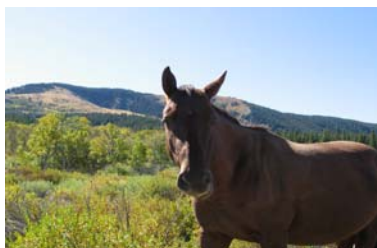
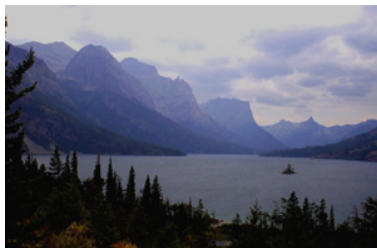


# COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

## NORTH CENTRAL MONTANA ECONOMIC DEVELOPMENT DISTRICT, INC

### ~ SWEETGRASS DEVELOPMENT ~



March 2006

Prepared for the  
**North Central Montana Economic Development District, Inc.**  
(Sweetgrass Development)  
By

**Sonoran Institute**  
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## **EXECUTIVE SUMMARY**

The principle task for Sweetgrass Development during the start-up phase is to produce this Comprehensive Economic Development Strategy (CEDS) and implement its recommendations. A CEDS is a document and planning process developed with broad participation that addresses economic problems and potential for an area.

Underlying the research and recommendations in this document is a philosophy, based on a growing body of literature on economic development, which states that successful approaches to prosperity focus on creating conditions in which entrepreneurship will succeed. This involves capitalizing on existing assets, cultivating innovation and economic diversity, supporting long-term social capital, and catalyzing regional partnerships.

The principle strengths of the region are: a relatively high education rate and above average earnings per job and per capita income. The region is economically diverse, has a low unemployment rate and plenty of affordable housing. There is a metropolitan area within the Sweetgrass region, which is reasonably accessible to some communities. Road and rail transportation is adequate. There also exists a high quality of life in the Sweetgrass region, which citizens value and wish to protect. There are identifiable local businesses that can act as models of success and a high level of locally invested citizens eager to contribute to a prosperous future.

The weaknesses of the region are: three out of five counties saw their total personal income decline from 1990 to 2003. In most counties, with the exception of Cascade and Teton counties, there is too much reliance on relatively lower wage tourism-related service sectors and not enough growth in the high-wage services, such as information, financial, and health services. In spite of good highways, three of the five counties (those with the lowest wage service industries) are isolated from major population centers and therefore cannot readily access a commercial airport. Agriculture, historically the most important industry, has not generated new jobs or income in recent years. Many counties within the region are experiencing high rates of drug use and an outflow of youth to more urban areas. Some communities do not have a skilled workforce able to compete for higher wage jobs.

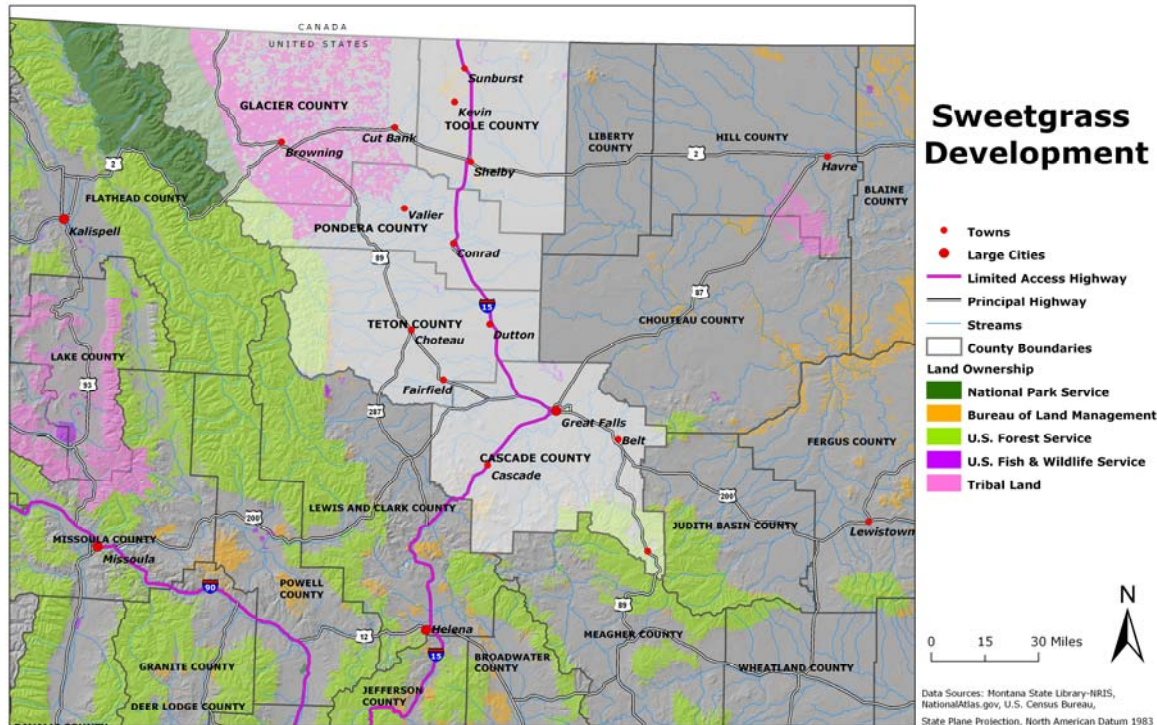
The Sweetgrass region as a whole will benefit from economic diversification, which will provide greater resilience for communities and a broader array of opportunities to individuals. Exploring high-wage service sectors and value-added agriculture should be a significant component of this diversification. It is equally important to develop a set of financial tools and resources for entrepreneurs in the region. Job training as well as advanced educational opportunities will be crucial to retaining area youth and positioning the region's labor force to compete successfully in higher wage enterprises.

This CEDS document outlines a plan of action that capitalizes on the region's strengths (i.e., trades on its competitive advantage) and addresses its weaknesses. It presents a region-wide plan, as well as county-by-county plans, with specific action items. We believe that if the underlying conditions of the region are re-examined in light of competitive strengths and emerging market opportunities, investors and entrepreneurs will apply their resources and skills to increase prosperity in the region.



## BACKGROUND – SWEETGRASS DEVELOPMENT AND THE CEDS PROCESS

The Sweetgrass Development District consists of Cascade, Glacier, Pondera, Teton and Toole counties, Montana.



## HISTORY OF THE CREATION OF SWEETGRASS DEVELOPMENT

### Federal Background

The Economic Development Administration (EDA) recognizes the effectiveness of regional economic development efforts in rural areas of the United States. During the 1960s and 1970s, EDA formed regional organizations called Economic Development Districts (EDD). The Districts often encompassed several rural counties. The most familiar EDD in Montana is Bear Paw Development Corporation located in the north central portion of the state. Bear Paw Development Corporation serves the counties of Hill, Blaine, Phillips, Choteau and Liberty. Bear Paw was officially recognized as an EDD on March 22, 1969.

The five counties of Cascade, Glacier, Pondera, Teton and Toole, also formed an Economic Development District during the 1970s. The EDD was called The Golden Triangle. It did not enjoy the success of Bear Paw Development Corporation and became defunct during the 1980s.

The North Central Montana Resource Conservation and Development (RC&D), another federal program sponsored through the United States Department of Agriculture (USDA) and Natural Resource and Conservation Service (NRCS), also recognized the effectiveness of regionalization. The RC&D formed its own, larger district. The RC&D district includes the five counties of Bear Paw Development Corporation as well as Cascade, Glacier, Pondera, Teton and Toole counties. The

RC&D provides technical assistance in grant writing, planning and other community development projects that have more of a land conservation focus.

The RC&D wrote the application for the western five counties of the RC&D district (Cascade, Glacier, Pondera, Teton and Toole) to once again form an Economic Development District. In early 2004, the new North Central Montana Economic Development District received notification from the EDA of official recognition and began doing business as Sweetgrass Development, EDD.

The benefits for the five counties of the new EDD include:

1. Participation in EDA and state funding programs;
2. Reduced dollar match for grant programs;
3. Inclusion in the area-wide CEDS document; and
4. Networking with other communities in the region.

## **State Background**

The economic downturn experienced in Montana during the 1990s caused State Government also to assess “best practices” among economic development efforts, one of them being an increased interest in regionalization. As a result, the State of Montana developed the Certified Regional Development Corporation Program.

In the late 1980s, the State of Montana put together a program called “Certified Communities.” The goal of Certified Communities was to better equip cities and towns to meet the needs of expanding or relocating business and industry. Each Certified Community was asked to complete a community profile. The community profile contained demographic information and potential industrial site data. The Certified Community program operated for more than 12 years without state funding. In 2000, the Montana State Legislature appropriated \$425,000 for the program. A formula using population, counties and cities served as well as square miles was developed to divide the money among the recognized certified communities.

There were approximately 40 qualified communities in the first year. In the second year, the number almost doubled. In 2003, the State of Montana underwent a budget crisis and the money was returned to the General Fund. With the intervention of Montana Economic Developers Association (MEDA), the program was salvaged, but with major changes. Individual communities would no longer receive funds. Rather, the money would go to Certified Regional Development Corporations.

## **Certified Regional Development Corporations**

The new plan provided for twelve Certified Regional Development Corporations (CRDC) throughout the state. The CRDC would provide four major services:

1. Small business technical assistance;
2. Revolving loan fund program;
3. Planning; and
4. Grant writing and administration.

And, to a lesser degree:

5. Business recruitment; and
6. Business retention and expansion.



In May and June of 2004, twelve applications were submitted and accepted. Sweetgrass Development, EDD was among those accepted. These include:

### **Development Organizations in the Region**

#### Cascade County:

- Great Falls Development Authority (GFDA)
- High Plains Financial

#### Glacier County:

- Browning Community Development Corporation
- GAIN Development, Inc. (Glacier Action and Involvement Now)

#### Pondera County:

- Pondera Regional Port Authority (PRPA)
- Valier Area Development Corporation

#### Teton County:

- Teton County Development Corporation (TCDC)

#### Toole County:

- City of Shelby Community Economic Development Director
- Northern Express Transportation Authority (NETA)

#### Regional Organizations:

- North Central Montana RC&D
- Sweetgrass Development

### **The Role of Sweetgrass Development**

Negotiations with local development organizations and local governments of Cascade, Glacier, Pondera, Teton and Toole Counties led to the successful application to the State of Montana. Because of the start-up nature of Sweetgrass Development, EDD as a CRDC, not all of the aforementioned services will be immediately undertaken.

1. Small business technical assistance and training will be provided for the region through the Small Business Development Center (SBDC).
2. Regional revolving loan plans will be accounted for through High Plains Financial in Great Falls.
3. Grant writing and administration will continue to be offered through the local development organizations: GAIN (Glacier County), TCDC (Teton County), PRPA (Pondera County), GFDA (Cascade County) and NETA (Toole County).
4. Business recruitment, retention and expansion would also continue to be offered through these same local development organizations.

With many of the economic development tasks in the hands of SBDC, GAIN, TCDC, PRPA, GFDA and NETA, the principle short-term task for Sweetgrass Development, EDD, is the development of a CEDS document and the implementation of its recommendations.

**THE PRINCIPLE SHORT TERM TASK FOR SWEETGRASS DEVELOPMENT,  
EDD, IS THE DEVELOPMENT OF A CEDS DOCUMENT  
AND THE IMPLEMENTATION OF ITS RECOMMENDATIONS.**

## Staff and Board of Sweetgrass Development

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Conrad	Byron Grubb	271-3623	411½ S Main Conrad, 59425
Dutton	Robert Dauwalder and Jean Schoonover	476-3311	PO Box 156 Dutton, 59433
Fairfield	Agnes Kolste (Lillian Alfson-Mayor)  Quentin Kujala	467-2510 467-2885 (H) ffield@3rivers.net Christine Hardin, CEDS 467-3620	PO Box 183 Fairfield, MT 59436  PO Box 291
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Great Falls Port Authority	John Kramer	454-1934 jkramer@gfdevelopment.org	701 1 <sup>st</sup> Ave N Great Falls, 59401
Kevin	Rick Rice	337-3762	PO Box 217 Kevin, 59454

COUNTY/CITY REPRESENTED	NAME	CONTACT NUMBERS	ADDRESS
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Pondera County	Cynthia Johnson	271-4010 pococo@3rivers.net	20 4 <sup>th</sup> Ave SW Conrad, 59425
Pondera Port Authority	Bonnie Field	279-3222 Home 279-3482 fri@3rivers.net	PO Box 154 Valier, 59486
Shelby	Lorette Carter	424-8799 434-5222 shbcd@3rivers.net	112 1 <sup>st</sup> St S Shelby, 59474
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## THE CEDS GOALS AND PROCESS

Production of a CEDS document is an EDA requirement to attain recognition as an Economic Development District. The CEDS document is the result of a local planning process designed to guide the economic growth of an area.

### Goals

This Comprehensive Economic Development Strategy (CEDS) is a resource for Sweetgrass Development to accomplish the following goals:

1. Create higher skill, higher wage jobs
2. Raise income levels
3. Diversify the economy
4. Improve quality of life while protecting the environment

### Process

This CEDS document was developed by the Sonoran Institute, a non-profit organization whose mission is *to promote community-based decisions that respect and benefit the land and people of the West* ([www.sonoran.org](http://www.sonoran.org)). Staff and board of Sweetgrass Development were closely involved in the identification of community opportunities and challenges and the development of an action plan. The process for developing the CEDS consisted of:

1. An analysis of regional and local economic conditions;
2. A series of focus groups, or listening sessions, with community leaders in each of the five counties;
3. A review of existing county planning documents;
4. Identification of strengths and weakness, both economic and social;
5. Development of Goals and Objectives for addressing opportunities and challenges;
6. Development of an action plan.

The focus groups and economic analysis were conducted during the summer and fall of 2005. A draft of the CEDS document was circulated for review by the Board of Directors, staff, and community leaders in December of 2005. A final draft was completed by January of 2006.

For guidance in the development of this document the authors made use of:

Comprehensive Economic Development Strategy (CEDS) Guidelines. 2002.  
U.S. Department of Commerce, Economic Development Administration, Washington DC  
(OMB Approval No. 0610-0093) [www.doc.gov/eda](http://www.doc.gov/eda)

# THE SWEETGRASS DEVELOPMENT REGION

## Economic History

The economic history of the Sweetgrass region begins with the Northwestern Indian tribes: the North Piegans, the Blackfeet (South Piegans), and Kainai (Bloods). Speaking a common language, these tribes are collectively known today as the Blackfoot Confederacy. The Blackfeet moved into the region after following the buffalo herds south from Saskatchewan, in the early 1700s. In the following 200 years, fur trappers, white settlers, missionaries and the railroad all heavily impacted the Blackfeet, and forever changed the economic and cultural landscape.<sup>1</sup>

Early development focused on cattle and sheep ranching, and then farming. Although periodic droughts remain a problem for dry land grain farming, the advent of irrigation allowed other forms of agriculture, such as the growing of malting barley, to become possible, particularly on the western half of the Sweetgrass region. Petroleum and natural gas development have also played a role. Railroads and highways led to an increase in transportation-related commerce, and Glacier National Park, created in 1910, gave rise to tourism-related enterprises.

As this CEDS document illustrates, the economy of the region has grown and diversified over time. With the exception of buffalo hunting, all of the historic economic activities in the region remain, and have been added to recently by the rise of service industries, construction, government and other sectors.

The changes in the Sweetgrass region's economy are consistent with changes that have taken place in Montana, the West, and the Nation.

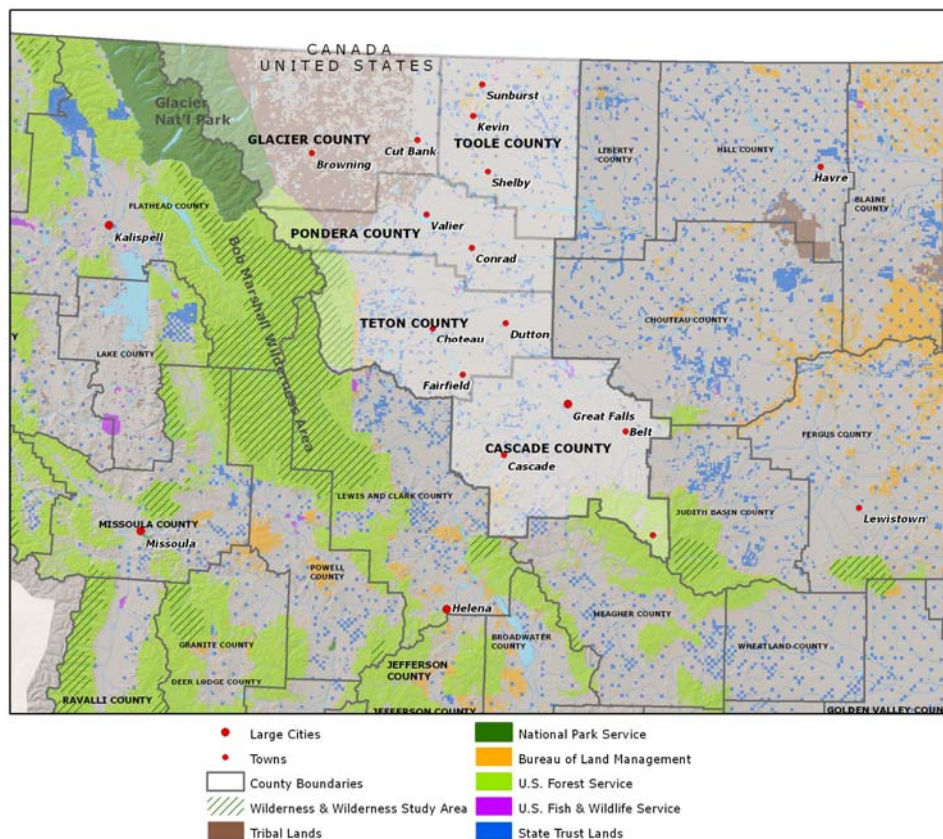
Much of the economic growth throughout the West in the last three decades has been in "service" industries. While the term conjures the image of low-paying jobs in the tourism industries, it is a U.S. Department of Commerce classification that also includes health care workers, accountants, realtors, financial consultants, engineers, and other relatively high-wage occupations. In this CEDS document we illustrate for each of the five counties the wages earned by industry, comparing goods-producing with service-providing sectors, and split these into sub-sectors to illustrate that a variety of wage levels exist in the economy in different sectors.

Like the rest of the West, non-labor income sources in the Sweetgrass region are also a fast-growing part of the economy. These include retirement income and income from investments. In the five counties in the region, non-labor income and services income accounted for over 80 percent of all net growth since 1970.<sup>2</sup>

These changes do not mean that historically important sectors are disappearing. Agriculture and oil and gas development, for example, remain important. But they have not been the source of new jobs in recent decades. This echoes West-wide and national trends.

## Natural Resources

The Sweetgrass region is where the prairies meet the Rocky Mountains. The eastern half of the five-county area is predominantly rolling hills interspersed with majestic buttes and gullies teeming with wildlife. Wheat and barley farms dominate the landscape, and occasionally a Hutterite colony can be seen in the distance. Oil pumps operate silently, visible along the foothills of the Rockies.



As the ground gains elevation heading the west, farms give way to ranches. Further west, the mountains rise up suddenly. This place, where ranch country meets the mountains, is referred to by Montanans with pride as the Rocky Mountain Front (or simply, The Front). The Front stretches approximately 110 miles in Montana. There is a high level of species and wildlife diversity due to the dramatic range of habitat; from foothills and grasslands to high elevation alpine meadows and tundra. The Rocky Mountain Front is also home to a third of all plant life found in Montana. These native plant and animal populations are generally intact since human settlement has been low impact and based principally on grazing<sup>3</sup>.

The Rocky Mountain Front is nationally recognized for its mega fauna, such as the grizzly bear, Canadian lynx, gray wolf and bighorn sheep, and its big game animals: elk, moose, mountain goat, mule deer, antelope and white-tail deer.<sup>4</sup> The Front is the last place in the lower 48 states where grizzly bears travel from the mountains to the prairies, and it is not unusual to see grizzly bears in and around the town of Choteau. For these reasons, this area is world-renowned among tourists, hunters and anglers.

The Marias River system runs throughout the Sweetgrass region. The Marias River is a tributary of the Missouri River and is approximately 210 mi (338 km) long. The headwaters of the Marias, Cut Bank Creek and the Two Medicine River flow out of the Rocky Mountain Front through the Blackfeet



Indian Reservation and come together near the border of Glacier County.<sup>5</sup> The Teton River joins the Marias River after coming from the Rocky Mountain Front through foothills and farmland. The Teton River passes south of the community of Choteau and its major tributaries are Muddy Creek, Deep Creek and McDonald Creek.<sup>6</sup> The Milk River is also a major river in the Sweetgrass region. Like the Teton, it begins in the Rocky Mountain Front, and flows through parts of Glacier and Toole Counties.

### **Federal Public Lands**

Much of the land on the western edge of the Sweetgrass region is primarily public land, managed by the U.S.D.A. Forest Service and the U.S. National Park Service. These public lands contain approximately 1.5 million acres in congressionally designated Wilderness that includes the Bob Marshall, Great Bear and Scapegoat Wilderness areas. It also includes Glacier National Park, the Lewis and Clark National Forest and a small but important strip of land (because of potential energy development) managed by the Bureau of Land Management (BLM). Glacier National Park borders Watertown Lakes National Park in Canada and the two were designated as the world's first International Peace Park in 1932. In 1995, Glacier National Park and Watertown Lakes Park were designated as a Biosphere Reserve and World Heritage Site.<sup>7</sup> Conservation groups, such as The Nature Conservancy and the Boone and Crockett Club, also manage private wildlife reserves in the area.

The Rocky Mountain Front is also part of what geologists call the Montana Thrust Belt, a formation that contains potentially recoverable oil and gas. The potential to develop this resource has long been a source of political tension in the region. Efforts to protect the Rocky Mountain Front date back to 1947, when the Montana state legislature designated the Sun River Game Preserve. The Bob Marshall Wilderness was created by Congress in 1964. It was later expanded and today covers over a million acres. But even in this Wilderness there was potential for development, so in 1983 an emergency withdrawal was executed by Congress to prevent oil and gas leasing. To prevent drilling in the Badger-Two Medicine area of the Front the Blackfeet Tribal Council passed a resolution declaring the area sacred tribal ground. By 1978 the Great Bear Wilderness was designated, creating further protection to the Front. In 1993, and again in 1996, the Department of the Interior established a moratorium on oil and gas development in the Badger-Two Medicine area. In 1997 the Lewis and Clark National Forest issued a decision to reject all attempts at oil and gas leasing on Forest lands for 10 to 15 years. By 2001 this was extended to disallow all hard rock mining on the same Forest for 20 years.

The pitched battles between protection for the Rocky Mountain Front from energy development and the opening of the Front for development continue today. Most recently, in 2004, the BLM began a review process as part of the development of an Environmental Impact Statement (EIS) to explore the possibility of leasing drilling permits for natural gas development in the Blackleaf area (a strip of BLM land northwest of Choteau, nestled between ranch land and National Forest land). Based on public feedback, in October 2004 the BLM decided to suspend drilling proposals in the Blackleaf area.

### **Population**

According to the U.S. Census Bureau 2004 Population Estimates, the population in the Sweetgrass Development region is 110,882.<sup>8</sup> The majority, 73 percent, live in Cascade County. Over 50 percent of the population lives in the city of Great Falls. Population growth from 1990 to 2004 has been modest, at 3 percent. The fastest growing county (11% from 1990 to 2004) was in Glacier County, with the growth occurring outside of the main population centers of Browning and Cut Bank. There was population growth in North Browning, which added 570 people from 1990 to 2000 (2004 figures were not available), and in small communities adjacent to Glacier National Park, (such as East Glacier Park Village).

**Population of the Sweetgrass Region**

	1990	2000	2004	Percent Change 1990 - 2004	2004 Percent of Regional Population
<b>Cascade County</b>	<b>77,691</b>	<b>80,357</b>	<b>79,849</b>	<b>3%</b>	<b>72%</b>
Cascade	729	819	799	10%	1%
Belt	571	633	617	8%	1%
Great Falls	55,097	56,690	56,503	3%	51%
<b>Glacier County</b>	<b>12,121</b>	<b>13,247</b>	<b>13,508</b>	<b>11%</b>	<b>12%</b>
Browning	1,170	1,065	1,084	-7%	1%
Cut Bank	3,329	3,105	3,155	-5%	3%
<b>Pondera County</b>	<b>6,433</b>	<b>6,424</b>	<b>6,148</b>	<b>-4%</b>	<b>6%</b>
Conrad	2,891	2,753	2,638	-9%	2%
Valier	519	498	479	-8%	0.4%
<b>Toole County</b>	<b>5,046</b>	<b>5,267</b>	<b>5,094</b>	<b>1%</b>	<b>5%</b>
Kevin	185	178	155	-16%	0.1%
Shelby	2,763	3,216	3,304	20%	3%
Sunburst	437	415	362	-17%	0.3%
<b>Teton County</b>	<b>6,271</b>	<b>6,445</b>	<b>6,283</b>	<b>0.2%</b>	<b>6%</b>
Choteau	1,741	1,781	1,758	1%	2%
Dutton	392	398	377	-4%	0.3%
Fairfield	660	659	641	-3%	1%
Power	na	na	171	na	0.2%
<b>Region</b>	<b>107,562</b>	<b>111,740</b>	<b>110,882</b>	<b>3%</b>	

U.S. Census Bureau, 2004 Population Estimates, Census 2000, 1990 Census.

na - not available through the Census.

The communities listed in the table below represent close to 70 percent of the population. It is remarkable that eight out of these 12 communities lost population from 1990 to 2004. Most of the growth was in the metropolitan Cascade County, while modest growth occurred in Teton County. The town of Shelby grew by 20 percent. This was due to the establishment of a private correctional facility outside of the town of Shelby (inmates are included in Census accounting).

Population by Square Mile		
	1990	2000
Cascade County	29	30
Glacier County	4	4
Pondera County	4	4
Toole County	3	3
Teton County	3	3
Montana	5	6
United States	70	80

U.S. Census Bureau, 2004.

The Sweetgrass region is, with the exception of Cascade County, remote and sparsely populated, with an average of 3.5 people per square mile (8.8 per square mile if Cascade County is included). In comparison, the U.S. population is more concentrated, at 80 people per square mile. While nation-wide population density is increasing, in the Sweetgrass region it did not change significantly between the last two census periods.

According to the 2000 Census, most of the population in the Sweetgrass region self-identified as being either White or American Indian. The counties with the largest Native American populations are Glacier (61.8%, and in particular the Blackfeet Indian Reservation, which spills over into Pondera County, with 83.8% American Indian), and Pondera County (14.5%).

Population by Race		
	% White	% Native American
Cascade County	97	4.2
Glacier County	35.4	61.8
Blackfeet Reservation	13.8	83.8
Pondera County	83.7	14.5
Toole County	93.9	3.2
Teton County	96.3	1.5
Montana	90.6	6.2
United States	75.1	0.9

U.S. Census Bureau, 2004.

According to the 2000 Census, the majority of Montana's population, and that of the Sweetgrass region, is Caucasian. Within this category, the largest reported ancestries in the state are German, Irish, English, Norwegian, and American. While German ancestry is the largest reported European origin at 27% of the state population, in the north central area there is a large reporting of other Scandinavian ancestry as well.<sup>9</sup>

### **The Blackfeet Tribe**

Part of what are now Glacier and Pondera counties were set aside as the Blackfeet Indian Reservation by the Fort Laramie Treaty of 1851<sup>10</sup> – a treaty signing where Blackfeet tribal members were not present.<sup>11</sup> In 1896, the Blackfeet ceded the western portion of their reservation, which eventually became Glacier National Park.

The Blackfeet traditionally depended on buffalo for their existence, supplemented with wild roots berries and fruit. As fur trappers and white settlers moved in and as the Great Northern railway was built, over-hunting led to the virtual elimination of wild herds. Starvation followed, and soon afterward the tribe became dependent on the government for basic necessities.

In 1907 the Allotment Act allocated 302 acres to every tribal member. Some land was reserved for town sites (Browning and Babb) and the remainder was sold to white settlers. Tribal members were allowed to patent their land, though many did not understand the patenting process, and sold their land for very low prices. "It wasn't unusual for a man to trade his acreage for one horse."<sup>12</sup>

By 1934 the Indian Reorganization Act (IRA) allowed the tribe to form their own system of government, which resulted in, among others, the creation of the Blackfeet Tribal Business Council. According to the 2002 Blackfeet Tribe CEDS:

Since 1934 the Blackfeet have made slow but steady progress towards becoming the proud and industrious people they were prior to the arrival of the white man approximately 200 years before. The past 50 years since the IRA, the Blackfeet Tribe has progressed in all areas – economic development, education, social services, increased Tribal land base, population, improved health services, physical system, housing, management skills, and other areas.<sup>13</sup>

As later sections of this document illustrate, Glacier County, which consists predominantly of the Blackfeet Indian Reservation, is growing in terms of population, employment and personal income, yet large disparities in well-being continue to exist between tribal and non-tribal members in the county.

### **Hutterite Colonies**

Montana is home to about 4,000 Hutterites and the Sweetgrass region is home to a number of Hutterite colonies.<sup>14</sup> There are at least 15 colonies in the region; at least four in Glacier County; five in Pondera County; three in Teton County, one in Toole County; and two in Cascade County.<sup>15</sup>

Hutterites are members of a Christian denomination that live in “colonies,” where property is commonly owned by the church and basic necessities are provided through a communal system of welfare. The colonies function as efficient, industrial agricultural operations. Each colony consists of a population of less than 200 individuals. The predominant language spoken in the colonies is a German dialect, although Hutterites are bilingual. Three distinct groups of Hutterites exist in Montana: the Schmiedeleut, Darisusleut and Lehrerleut.

Although Hutterites live in close-knit communities, they do interact with the outside world to buy farm inputs such as fertilizer and equipment, and to sell farm products. In most of the colonies in Montana children leave school at the age of 15 to work on the farm operations of the colony. Hutterites are known for being religiously devoted, hard working and productive: 39 Hutterite colonies in Montana produce 60 percent of the state’s pork, 50 percent of its eggs, and 17 percent of its milk.<sup>16</sup>

## ANALYSIS OF REGIONAL AND LOCAL ECONOMIC CONDITIONS

The sections that follow show the economy from several perspectives:

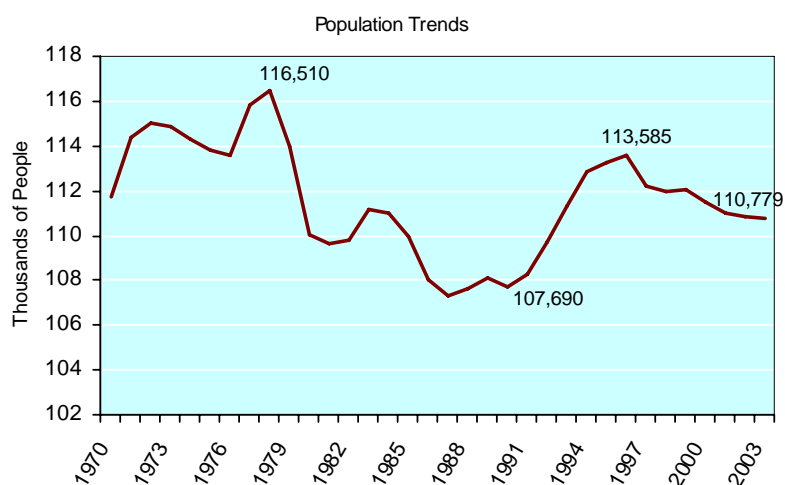
- The region;
- A comparison of the region against the state and the nation;
- Regional transportation capabilities; and
- County-by-county analysis.

NOTE: all figures in dollars terms have been adjusted for inflation (i.e., they are represented in constant dollars)

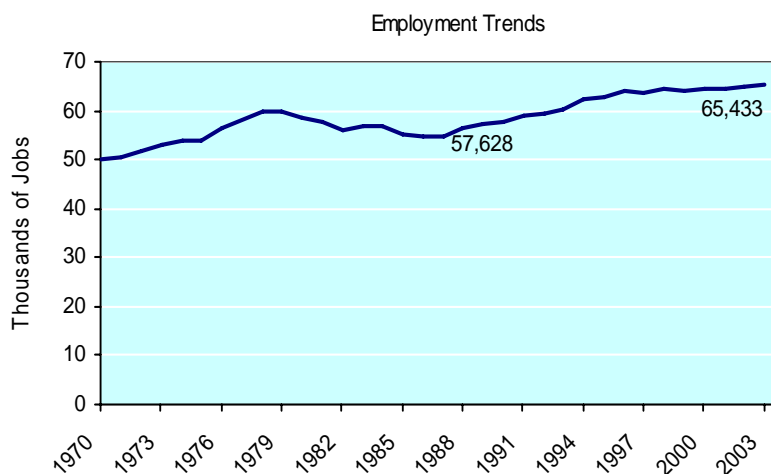
### THE REGIONAL ECONOMY<sup>17</sup>

#### Long Term Trends

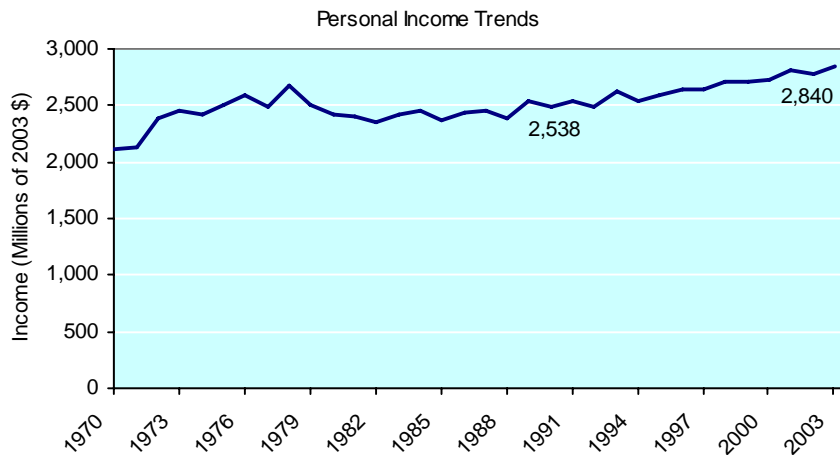
A detailed socioeconomic profile of the Sweetgrass region, which includes documentation of the data sources used to produce the graphs and tables below, is provided in Appendix B. Highlights from the profile follow below:



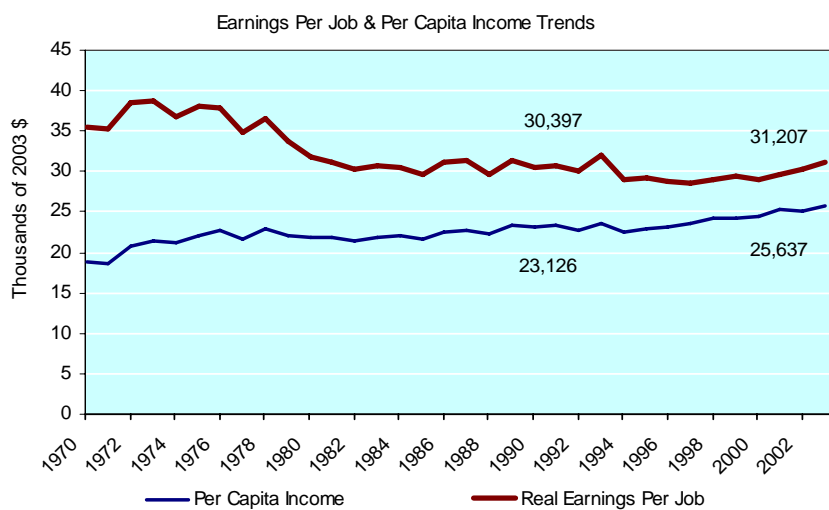
The population of the region has gone through several periods of rise and decline in the last 23 years. From 1990 to 2003 the region has added over 3,000 people (a 2.9% increase). From 1996 to 2003 the region lost 2,800 people (a 2.4% decline). As later sections show, some counties are growing very quickly (e.g., Glacier County), while others are not (e.g., Pondera County).



In contrast to the more dramatic ups and downs of population, the long-term employment trends for the region indicate a steadier upward trend. The exception is the late 1970s and early 1980s. From 1990 to 2003, over 7,800 new jobs have been created (a 13.5% increase).

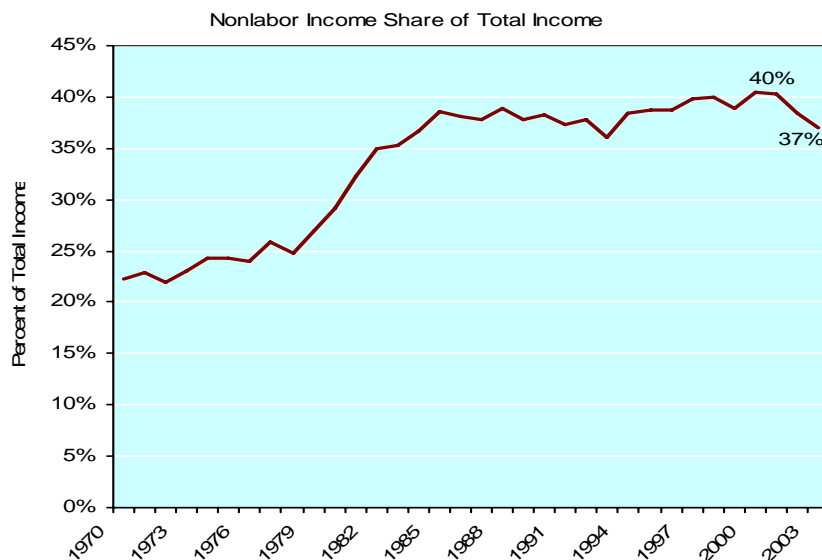


Following the same trend as employment, real personal income (adjusted for inflation) has grown steadily, with the exception of the late 1970s and early 1980s. From 1990 to 2003 over \$300 million in new personal income were generated in the region, an increase of 12 percent.



The average earnings per job in the region have declined steadily from the early 1970s to the 1990s. Earnings began to rise again in the 1990s and 2000s. From 1990 to 2003 average earnings per job grew by \$810, a 2.6 percent increase.

Per capita income in the region has grown steadily and continuously in the last 23 years. From 1990 to 2003 per capita income grew by over \$2,500, an 11 percent rise.



One reason for the steady growth in per capita income is the increasing importance of non-labor income sources in the region's economy. "Non-Labor Income" consists of Dividends, Interest and Rent (often referred to as money earned from investments) and Transfer Payments (payments from governments to individuals, much of it age-related, including Medicare, disability insurance payments, etc.).



## The Sweetgrass Region Compared to the Nation

When compared to the nation, Cascade, Glacier, Pondera, Teton and Toole counties – as a region – can be characterized by the following highlights. These are based on how this region compares to the distribution of all of the counties in the United States.

- Population Growth (Annualized rate, 1970-2003) was somewhat slow.
- Employment Growth (Annualized rate, 1970-2003) was somewhat slow.
- Personal Income Growth (Adjusted for Inflation, Annualized rate, 1970-2003) was somewhat slow.
- Non-labor Income Share of Total in 2003 was roughly average.
- Median Age was roughly average.
- Per Capita Income (2003) was somewhat high.
- Average Earnings per Job (2003) was somewhat high.
- Education Rate (% of population 25 and over who have a college degree) was somewhat high.
- Economically less specialized (more diverse) than the nation.
- Housing Affordability was somewhat less affordable.
- Government share of total employment was somewhat high.
- Unemployment Rate in 2004 was somewhat low.

The figure on the following page shows graphically the various ways the Sweetgrass is different from the nation.

The trends can be summarized in terms of strength and weaknesses of the region:

### Regional Economy Strengths:

1. Relatively high education rate
2. Relatively high average earnings per job
3. Relatively high per capita income
4. Economically less specialized (more diverse) than the nation
5. Affordable housing
6. Low unemployment rate

### Weaknesses:

1. Relatively slow growth in population, employment and personal income
2. A higher ratio of rich to poor than the nation (income is less evenly distributed)
3. A higher dependence on personal income from people employed in government

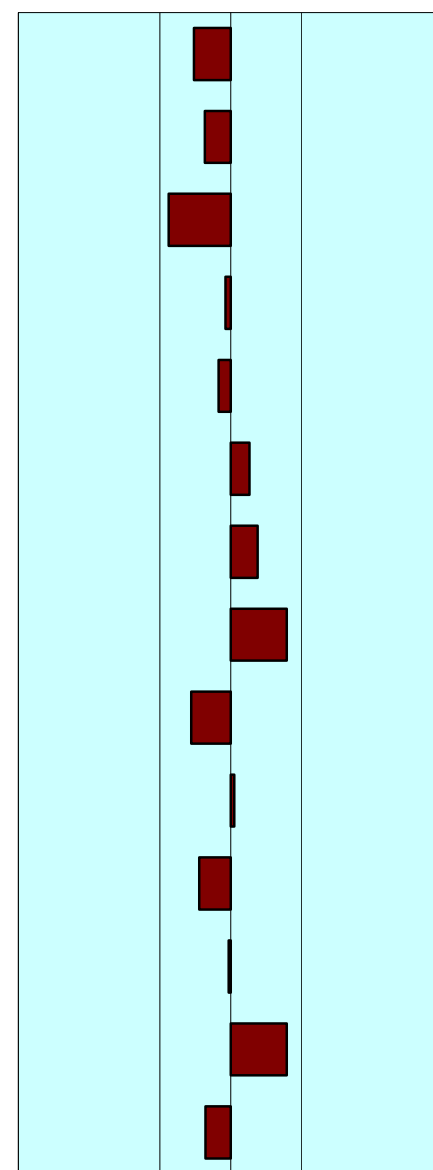
NOTE: Figures on the following pages compare the Sweetgrass region to the median of the U.S. and the median of the state. *Median* is the middle value of a list of numbers; it is the middle value in a distribution, above and below which lie an equal number of values. This is different from *mean (average)*, which is the sum of all the numbers in a list divided by the number of numbers in the list.

Benchmark = Median of all Counties in U.S.\*\*\*

Compared to benchmark area, the county has:

← Less Than | More Than →

	Sweetgrass	US Median
<b>Population Growth (Annualized rate, 1970-2003)</b>	-0.03%	0.7%
<b>Employment Growth (Annualized rate, 1970-2003)</b>	0.8%	1.4%
<b>Personal Income Growth (Adjusted for Inflation, Annualized rate, 1970-2003)</b>	0.9%	2.2%
<b>Non-labor Income Share of Total in 2003</b>	37.0%	37.6%
<b>Median Age*</b>	36.6	37.3
<b>Per Capita Income (2003)</b>	\$ 25,637	\$ 24,082
<b>Average Earnings Per Job (2003)</b>	\$ 31,207	\$ 28,076
<b>Education Rate</b> (% of population 25 and over who have a college degree)*	20.6%	14.5%
<b>Employment Specialization*</b>	810.1	961.0
<b>Ratio Rich/Poor</b> (Number of households that made under \$30K for every household that made over \$100K.)*	9.5	8.7
<b>Housing Affordability</b> (100 or above means that the median family can afford the median house.)*	157	186
<b>Change in Housing Affordability (1990-2000)*</b>	9.8%	10.3%
<b>Government share of Total employment</b>	21%	15%
<b>Unemployment Rate in 2004**</b>	4.6%	5.4%



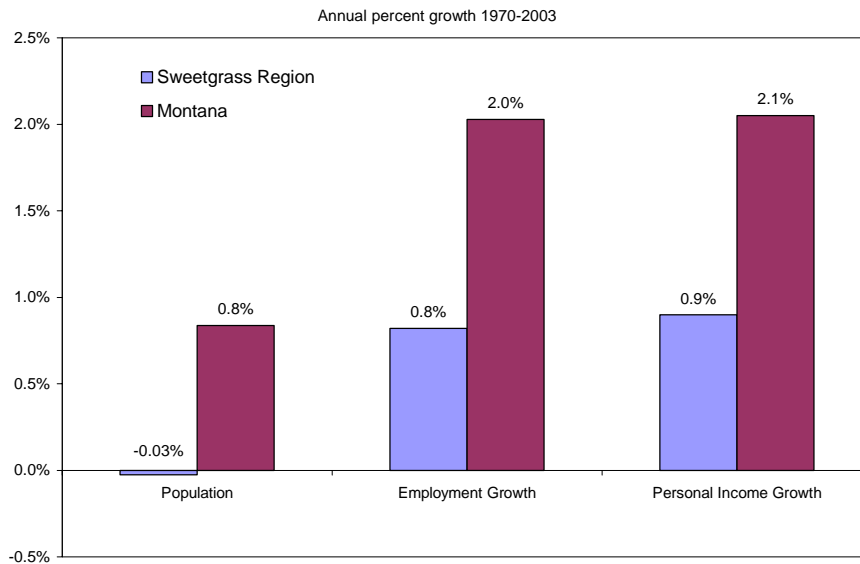
\* from 2000 US Census \*\* from Bureau of Labor Statistics

(3.00) (1.00) 1.00 3.00  
# of Standard Deviations from the Median

NOTE: The *housing affordability* figures assume a 20 percent down payment and that no more than 25 percent of a family's income goes to paying the mortgage. It is based on an interest rate of 10.01 percent in 1990 and 8.03 percent in 2000. This statistic is best if used as a comparative, rather than absolute, measure.

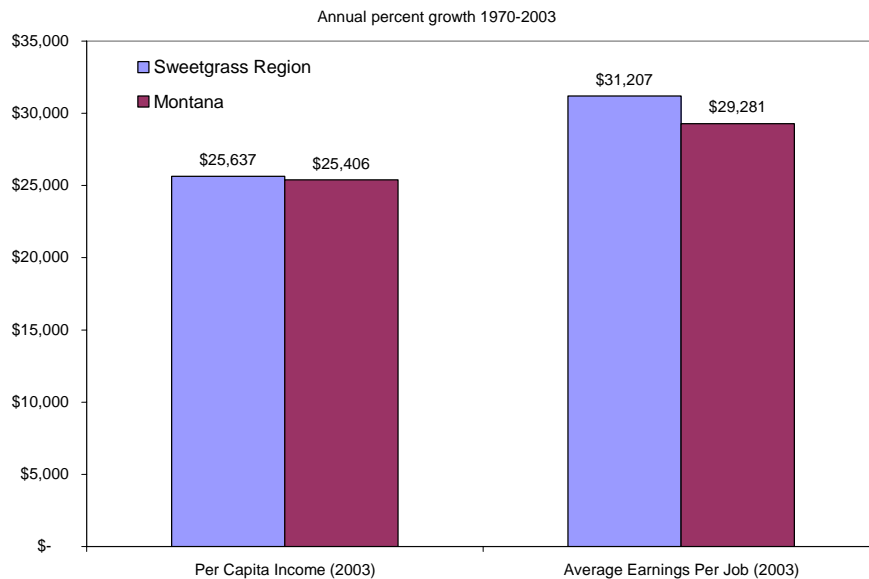
Owner Occupied Housing Affordability	1990	2000
Median home value (Adjusted for Inflation in 2000 \$)	\$ 74,967	\$ 87,300
% of median income necessary to buy the median house	18%	16%
Income required to qualify for the median house	\$ 25,284	\$ 24,668
Housing Affordability Index: (100 or above means that the median family can afford the median house.)*	143	157

## The Sweetgrass Region Compared to Montana



Compared to Montana the Sweetgrass region has slower growth (or absolute decline in terms of population) than the state in terms of adding new jobs or personal income.

While the Sweetgrass region is not growing at the same rate as the state of Montana, it has higher per capita income and average earnings per job.



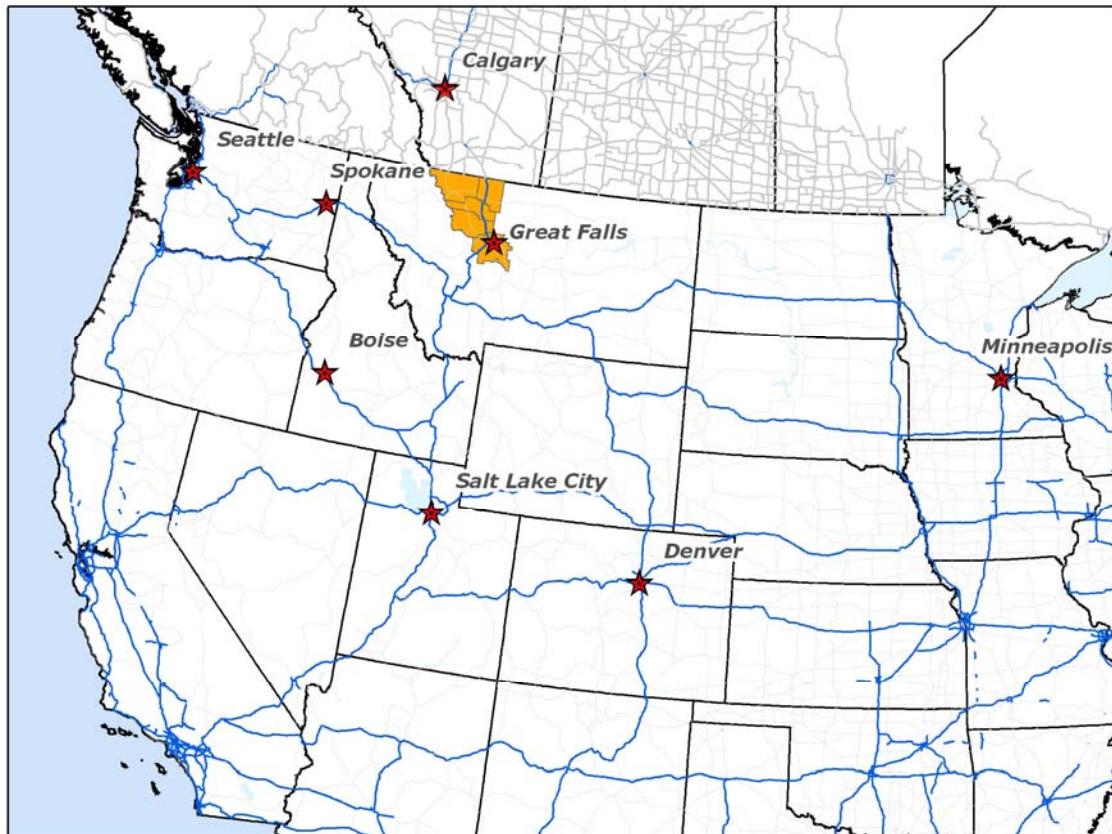
In other measures the Sweetgrass region has, like the state of Montana, a low unemployment rate, it is slightly more diverse economically, housing is more affordable, and there is a higher dependence on government employment as a source for personal income.

	Sweetgrass	Montana
Population Growth (Annualized rate, 1970-2003)	-0.03%	0.8%
Employment Growth (Annualized rate, 1970-2003)	0.8%	2.0%
Personal Income Growth (Adjusted for Inflation, Annualized rate, 1970-2003)	0.9%	2.1%
Non-labor Income Share of Total in 2003	37.0%	35.4%
Median Age*	36.6	37.5
Per Capita Income (2003)	\$ 25,637	\$ 25,406
Average Earnings Per Job (2003)	\$ 31,207	\$ 29,281
Education Rate (% of population 25 and over who have a college degree)*	20.6%	24.4%
Employment Specialization*	810.1	752.1
Ratio Rich/Poor (Number of households that made under \$30K for every household that made over \$100K.)*	9.5	8.1
Housing Affordability (100 or above means that the median family can afford the median house.)*	157	144
Change in Housing Affordability (1990-2000)*	9.8%	-2.2%
Government share of Total employment	21%	16%
Unemployment Rate in 2004**	4.6%	4.4%

## Regional Transportation Infrastructure

### Roads

Like the rest of Montana, one of the challenges for the Sweetgrass region is a high degree of isolation from major metropolitan areas and the trade opportunities they offer. A business owner in the area, wanting to see customers or suppliers, or transport a product, would have to drive a long distance. The closest large metropolitan area to Great Falls, for example, is Calgary – a five hour drive. The map below shows illustrates the degree of isolation of the Sweetgrass region from large metropolitan areas.



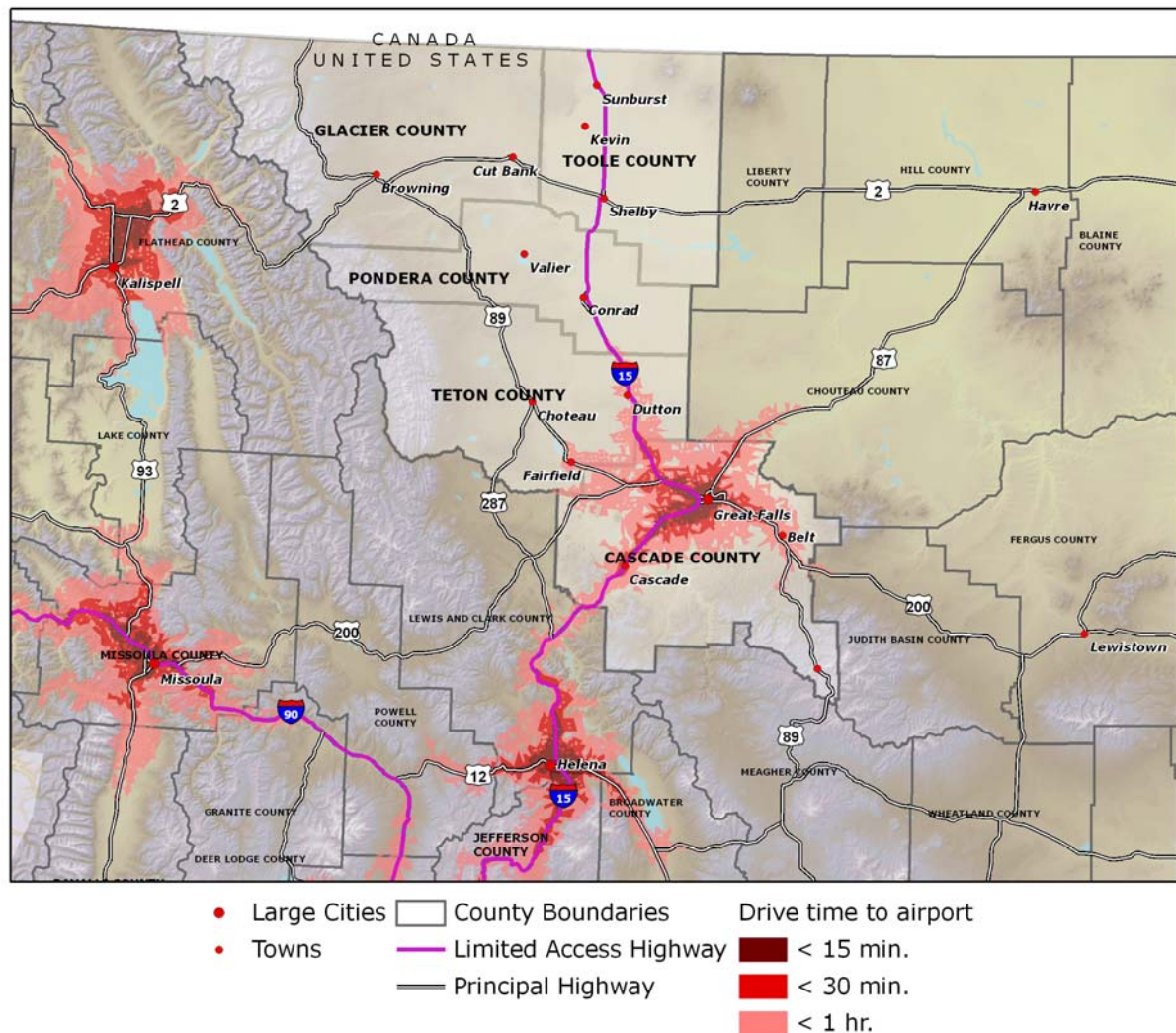
The nearest large commercial trading centers, with populations over 200,000, are: Calgary, Alberta to the north via Interstate Highway 15 (322 miles from Great Falls); Spokane, Washington to the west via Highway 2 or I-15 and I-90 (400 miles) and Seattle (679 miles); Minneapolis, Minnesota to the east via I-15 and I-90 (972 miles). Markets to the south are: Boise, Idaho via I-15 and I-84 (637 miles); Salt Lake City, Utah via I-15 (570 miles); and Denver, Colorado via I-15, I-90 and I-25 (772 miles).

While Montana is sparsely populated, with fewer than a million people total and approximately six people per square mile, there are several major population centers accessible to the Sweetgrass area via roads and highways.<sup>18</sup> The state's largest city is Billings (population 89,847), 220 miles from Great Falls. The next largest is Missoula (population 57,053), 160 miles from Great Falls. Great Falls, with 56,690 people is the third largest city in the state. The fourth largest is Bozeman (population 30,753) is 190 miles from Great Falls.

## Airports

Because the population of the Sweetgrass region is small, approximately 110,000, efforts at improving job opportunities must focus on maintaining and improving the ways business owners can connect with suppliers and customers outside the region. Besides road travel, this can be accomplished via air travel.

The map below shows in red a one-hour's drive time (on existing roads and assuming adherence to existing speed limits) to commercial airports with daily service to major hubs and metropolitan areas. A cut-off of 25,000 enplanements (passenger loadings) per year was used as the cutoff point to identify commercial airports.<sup>19</sup>



Three out of the five counties (Glacier, Toole and Pondera) in the Sweetgrass region are rural and isolated, far from cities and from commercial airports that can readily transport people to large population centers. Cascade and Teton counties, in contrast, have the majority of their population within an hour's drive to the Great Falls airport. The implications are that for Glacier, Toole and Pondera counties the prospects of attracting "footloose entrepreneurs" – people who work in the knowledge-based sectors and can work almost everywhere, as long as they stay connected, is limited. For Great Falls, and the towns of Fairfield and to a lesser extent Choteau, this form of economic development is a more likely option.



## Railroads

The map below shows the various railways connecting the Sweetgrass area to other population centers. Used largely for the shipping of locally produced grain, these railroad connections are vital to agriculture in the region. Of particular note are the communities where both highways and railroads intersect; Great Falls and Shelby. For Shelby, where every day thousands of railcars and semi trucks pass through, a successful transportation hub has been developed that has helped diversify the economy beyond its historical dependence on agriculture and petroleum.



### Transportation Strengths:

1. I-15 and local state highways
2. Close to Canada (opportunities for border trade)
3. Reasonable driving distance to metropolitan areas within Montana
4. Presence of metropolitan area (Great Falls)
5. Good railroad infrastructure
6. Commercial airport in Great Falls

### Weaknesses:

1. Isolation from large out-of-state metropolitan areas of over 200,000 people.
2. Direct routes to Missoula and Kalispell are blocked by mountainous terrain.

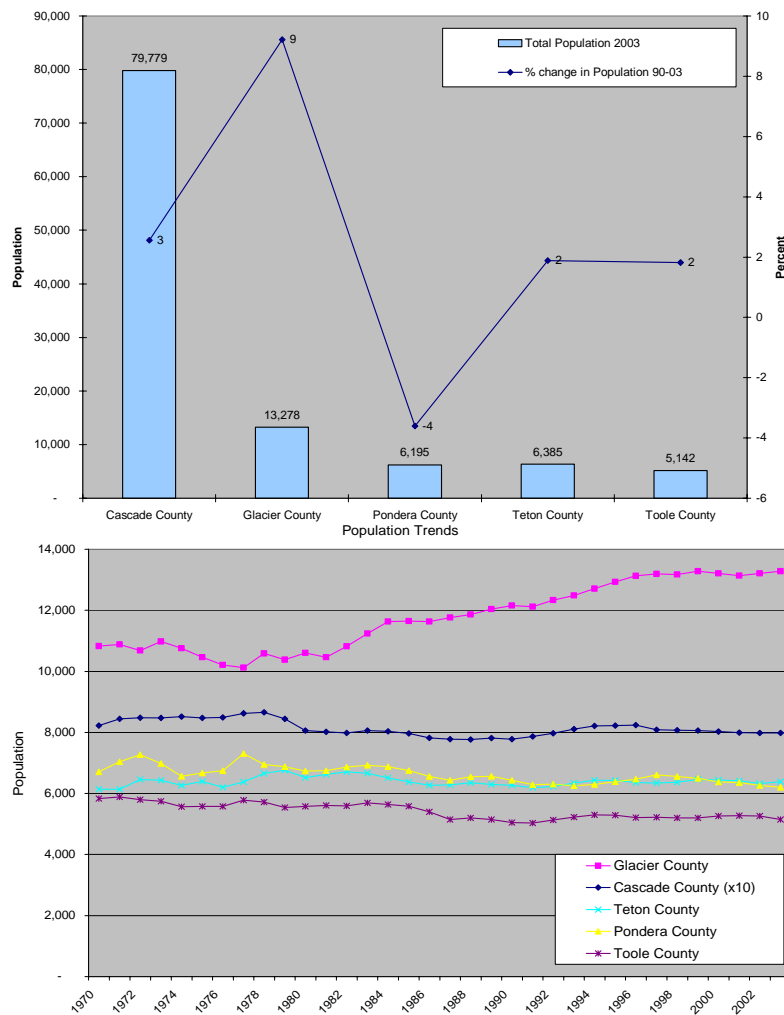


## THE ECONOMY OF INDIVIDUAL COUNTIES<sup>20</sup>

This section describes the differences between Cascade, Glacier, Pondera, Teton and Toole counties, and shows how each county is unique, with its own strength and weaknesses. This section also shows the interdependence between counties in terms of cross-county commuting flows. Detailed county profiles were produced for each county. These are on file, in PDF format, with the Executive Director of Sweetgrass Development.

### Comparisons Between Counties

#### Population



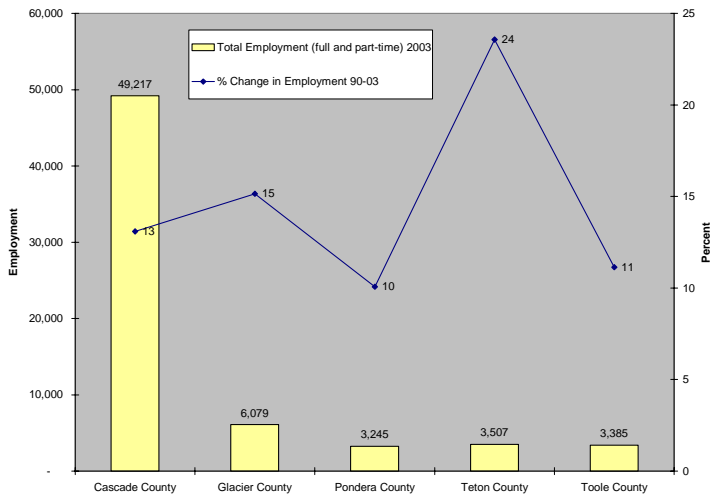
The bulk of the population in the Sweetgrass region is in Cascade County (72%).

The fastest growing county is Glacier County, which grew by 9 percent from 1990 to 2003. The slowest is Pondera County, which declined by 9 percent from 1990 to 2003.

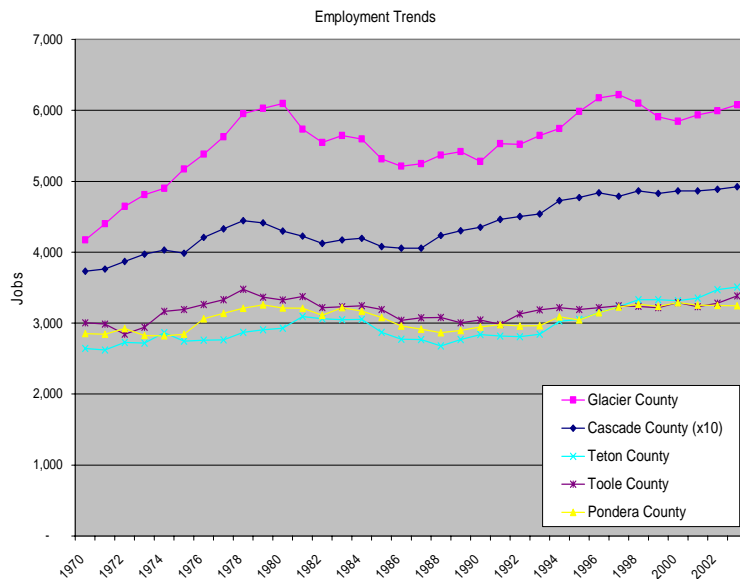
Long-term trends in population illustrate that the population growth in Glacier County has been continuous since 1980. In contrast, Cascade County's population has been hovering close to 80,000 people since 1980. In similar fashion, the population in Teton, Pondera and Toole has fluctuated up and down slightly over the years, but the long term trend is one of stability.

**NOTE:** In order to compare among counties on the same graph, and at the same scale, figures for Cascade County were divided by 10. When reading the units on the vertical axis, figures for Cascade County need to be multiplied by 10.

## Employment

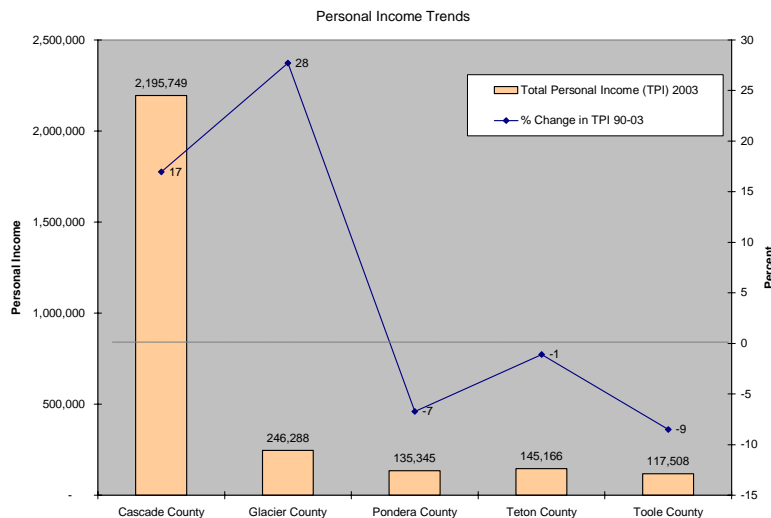


Most of the employment in the region (75%) is in Cascade County. The fastest growth in employment, from 1990 to 2003, was in Teton County (24%), where 699 new jobs were added. During that same period of time Cascade County added 5,700 new jobs, and Glacier County added 1,200 new jobs. Pondera and Toole counties had modest growth, adding 297 and 339 new jobs, respectively.



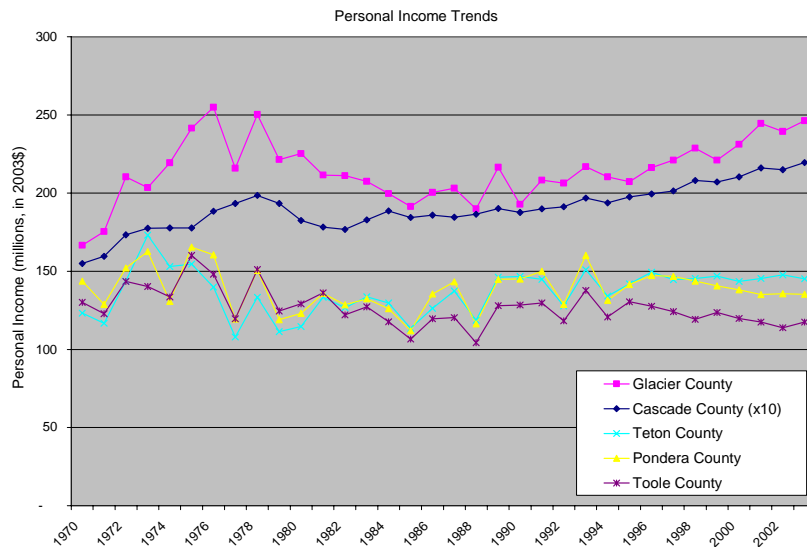
The long term trend for employment is similar to that of population growth: Glacier and Cascade counties have had a steady increase in jobs since the early 1980s. Teton County has had a steady rise in job creation since 1988, after an initial downturn in the early 1980s. Toole and Pondera counties have followed the same pattern as Teton County, although the rate of growth was slower. Pondera County showed a slight decline in jobs in the early 2000s.

## Personal Income



Cascade County accounts for 77 percent of the personal income in the Sweetgrass region.

From 1990 to 2003 personal income grew only in Cascade and Glacier counties. Pondera, Teton, and Toole counties lost personal income during that time (although the decline for Teton County was slight – only 1%).

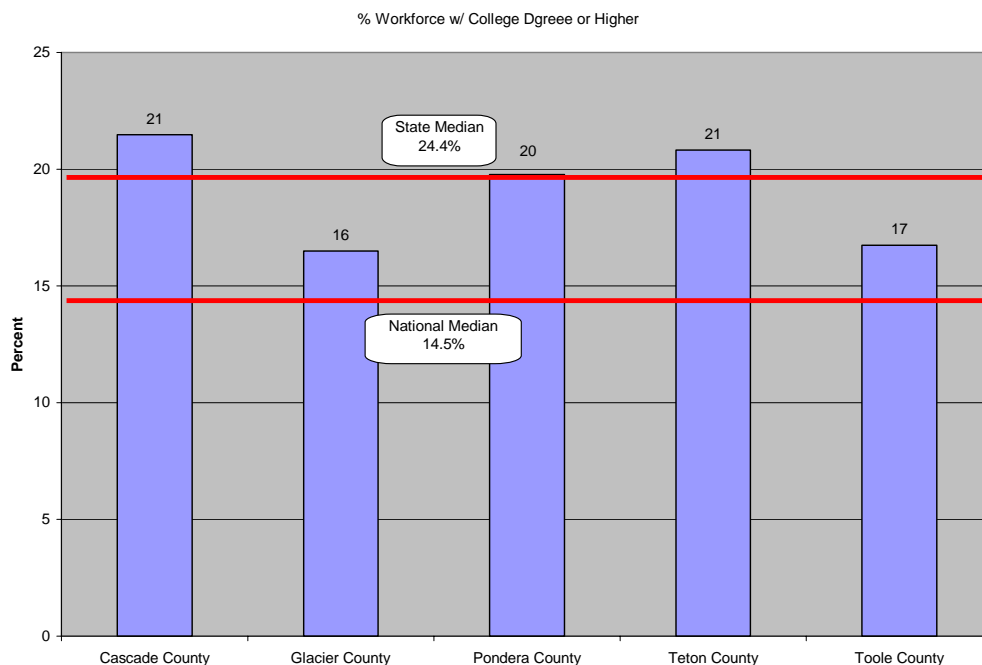


Glacier County has seen a long-term rise in total personal income (in constant dollars) since the mid-1980s, but with frequent periods of rise and decline in between. In contrast, the growth of personal income in Cascade has been steady and continuous since early in the 1980s.

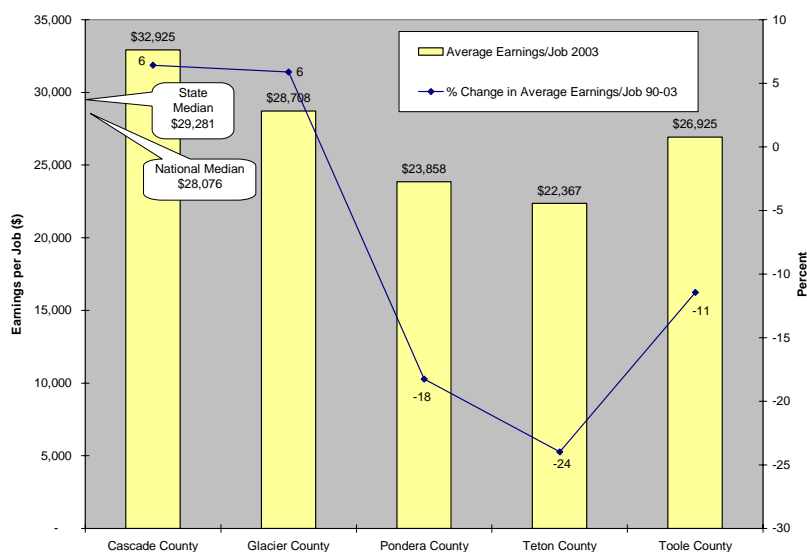
Long term changes in personal income in Teton, Pondera and Toole counties have shown an interesting trend: from 1970 to 1995 there was a great deal of volatility in the economy, with personal income rising and declining from year to year. Beginning in 1995 the economy stabilized, as shown by fewer radical fluctuations in personal income. Pondera and Toole counties have seen a slow and steady decline in total personal income from 1996 to 2003. In contrast, personal income in Teton County has almost remained stable.

## Education

One of the most important determinants of a county's ability to successfully adapt to change, and therefore to be resilient, is the education rate. Using the percentage of the workforce with a college degree or higher as an indicator, the figure below shows that all five counties are above the national median of 14.5 percent. Compared to the state median of 24.4 percent, Glacier and Toole Counties are less educated (in terms of this measure). Cascade and Teton Counties, at 21 percent, are closer to this state median. The Sweetgrass region as a whole has a median of 20.6 percent of the workforce with a college degree or higher, significantly higher than the nation.



## Average Earnings Per Job



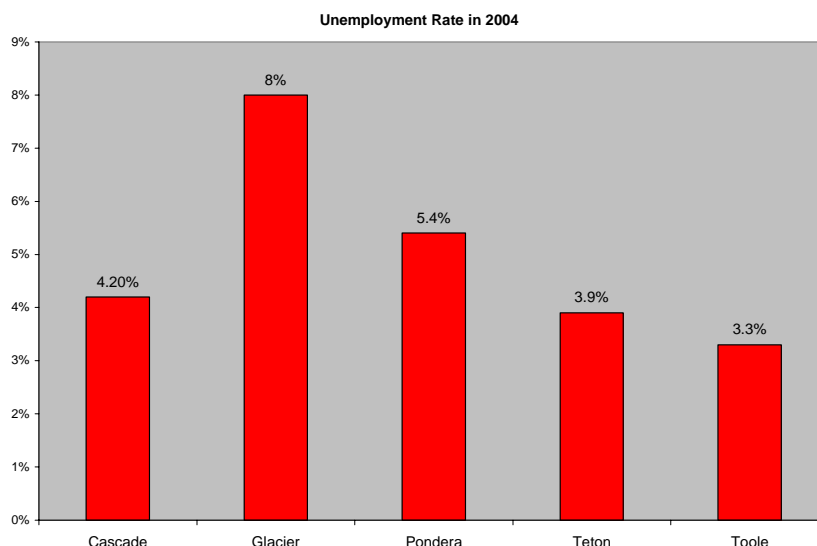
The highest paying jobs, (higher than the state median of \$29,281) are found in Cascade County (\$32,925). Only Cascade and Glacier counties have average earnings per job higher than the nation. The lowest earnings per job are in Pondera County (\$23,858) and Teton County (\$22,367).

The highest rate of growth in average earnings per job, from 1990 to 2003, was in the same counties with the highest average earnings (Cascade and Glacier

counties). During the same period of time, earnings per job, in real terms, declined in Toole County (-1%), Pondera County (-18%) and Teton County (-24%).

## Unemployment

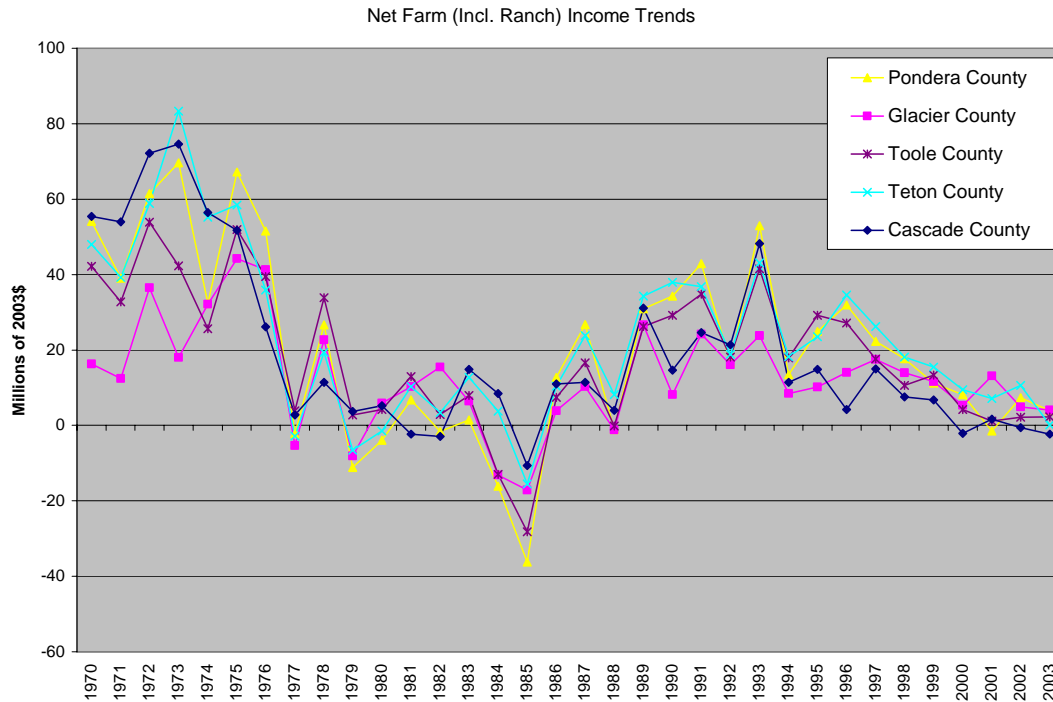
In 2004 the Sweetgrass region as a whole had an unemployment rate of 4.6 percent, only slightly higher than the state average of 4.4 percent. However, there is a great deal of variation among the five counties: the highest unemployment rate is in Glacier County (8%), and the lowest is in Toole County (3.3%).



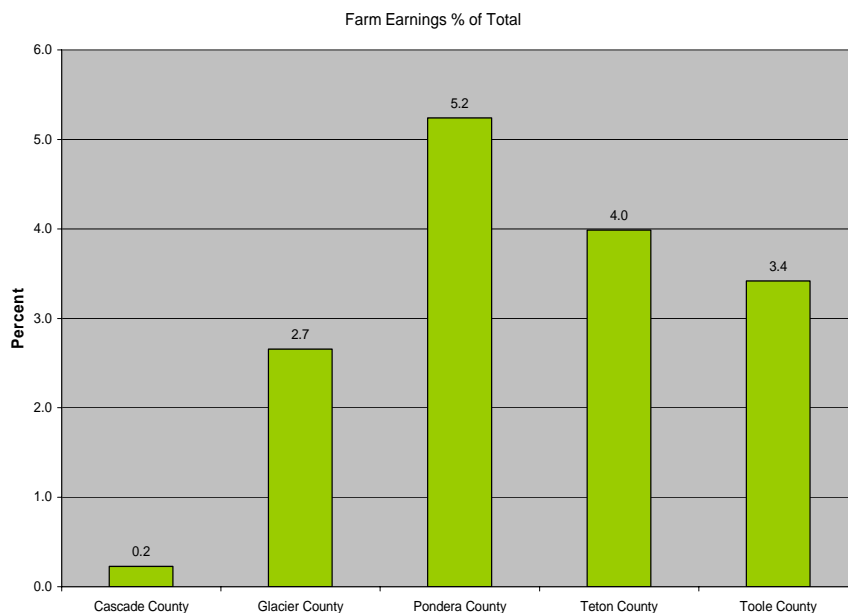
NOTE: There is a huge discrepancy between the Bureau of Labor Statistics unemployment rate for Glacier County in 2004 (8%) and the Bureau of Indian Affairs labor force survey, conducted in 2000 on the Blackfeet Reservation, showing the unemployment rate for the reservation at 62.5%.

## Agriculture

Because the Sweetgrass region has for a long time been heavily dependent on farming and ranching, the following pages focus on the agricultural sector to illustrate recent changes and differences between the five counties.



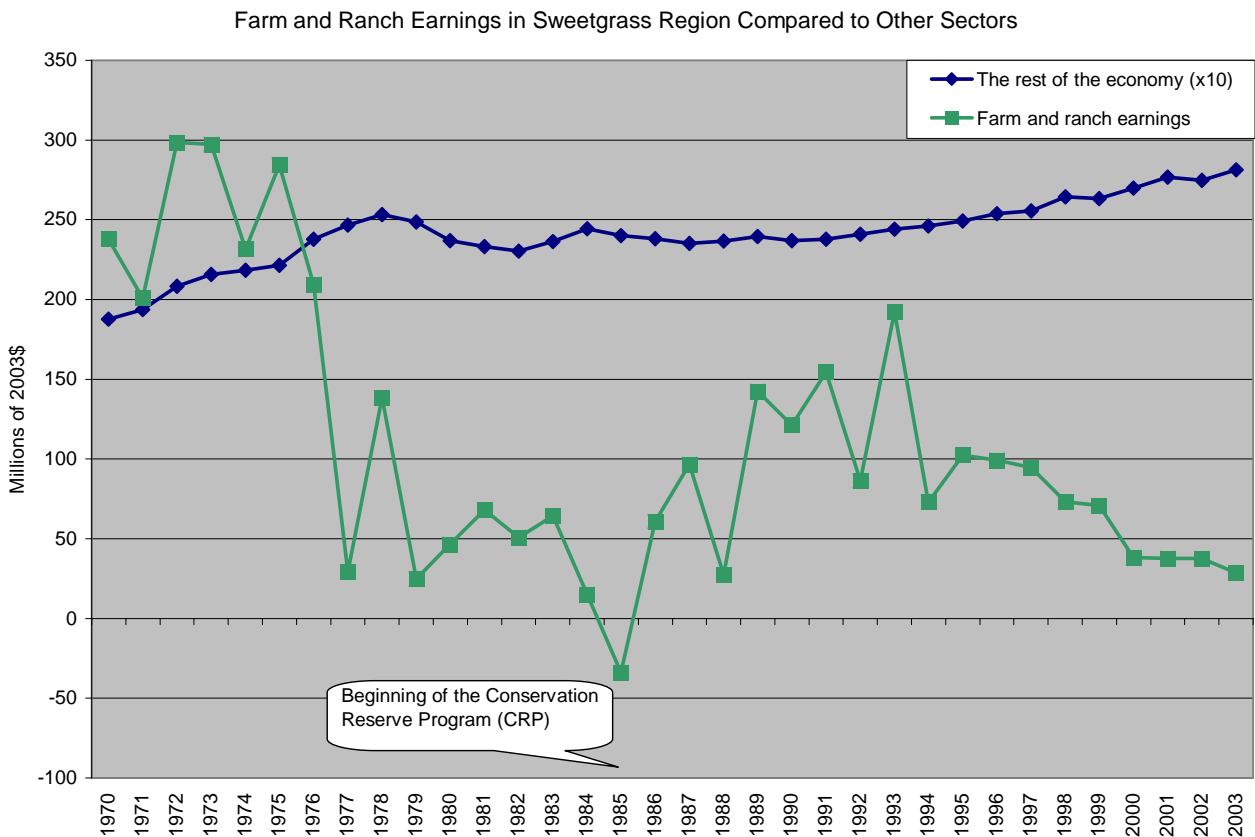
As this figure shows, net income from agricultural business, including family and corporate farms, was at its peak in the early 1970s, then declined significantly to the point where all counties were losing money in agriculture in the mid-1980s. Agriculture business income rose again, starting in 1985 and continuing into the mid-1990s, and then declined steadily from there to the break even point in the early 2000s.



As a percent of total personal income in 2003, income earned from people employed in farming was: 0.2 percent in Cascade County; 2.7 percent in Glacier County; 5.2 percent in Pondera County; 4 percent in Teton County, and 3.4 percent in Toole County.

In 2003, \$28.4 million dollars were earned by people employed in farming and ranching in the five-county Sweetgrass region. This represents **one percent** of the region's \$4.8 billion generated in personal income.

These figures will come as a surprise in an area known as The Golden Triangle, where good soils produce high-protein wheat and malting barley, among other crops. The reasons why farm and ranch personal income are recently a small component of total personal income are two-fold: there has been an *absolute* decline in farm and ranch income; and there has been a *relative* increase in personal income from other sources.



## The Conservation Reserve Program

A considerable amount of arable land in the Sweetgrass region is enrolled in the Conservation Reserve Program, or CRP. This is a voluntary program, administered by the Commodity Credit Corporation (CCC), wherein landowners may receive annual payments (based on the agricultural rental value of the land) in exchange for taking farmland out of production and planting cover crops. The CRP contracts last 10 to 15 years. According to the USDA's Farm Service Agency in 1997, the Sweetgrass region had cumulatively over 393,000 acres enrolled in the CRP program, with the largest amount in Toole County.<sup>21</sup>

County	Cumulative CRP Enrollment by County FY 1997 (acres)
Cascade	65,213
Glacier	64,224
Pondera	43,169
Teton	81,307
Toole	139,186
Total	393,100

The figure above shows that after CRP was established, farm and ranch earnings in the Sweetgrass region rose from a loss of \$34 million in 1985 to a gain of \$121 million by 1990. The rest of the economy during that time remained stable, and then grew during the 1990s and 2000s, despite declines in agriculture.



Although it is beyond the scope of this CEDS to investigate the economic impact of CRP, a review of the literature shows that its impact on rural communities is varied.

Recently, an extensive nationwide study was conducted by the Economic Research Service/USDA on the impact of CRP on rural communities. The authors conclude that:

...the economic impacts of CRP enrollment vary widely from one area to the next, but that the program's aggregate rural economic impacts have been modest. Factors other than CRP determine long run population and employment trends in rural America and in most cases CRP plays a minor role in the economic and social trends observed in rural counties. Nonetheless, there are significant interactions between CRP's influence and these other economic drivers which can make blanket statements about CRP's effects misleading in specific cases.<sup>22</sup>

The listening sessions conducted as part of the CEDS process indicate a persistent theme: people are concerned that CRP has negatively impacted farm-related businesses, such as implement and fertilizer sales, and grain elevators, as well as downtown retailers. However, participants in these sessions also pointed to the development of new grain elevators in Teton County as evidence that CRP has not devastated agriculture.

From the Economic Research Service study:

Our research suggests one likely source of job growth in areas with high levels of CRP enrollment. CRP's effects on wildlife and water quality led to an increase in outdoor recreational expenditures of as much as \$300 million per year, adding a significant stimulus to rural economies.<sup>23</sup>

In several instances it was brought to our attention that many recent land sales have not been made to neighboring farmers and ranchers, but to out-of-state hunters for game bird habitat.

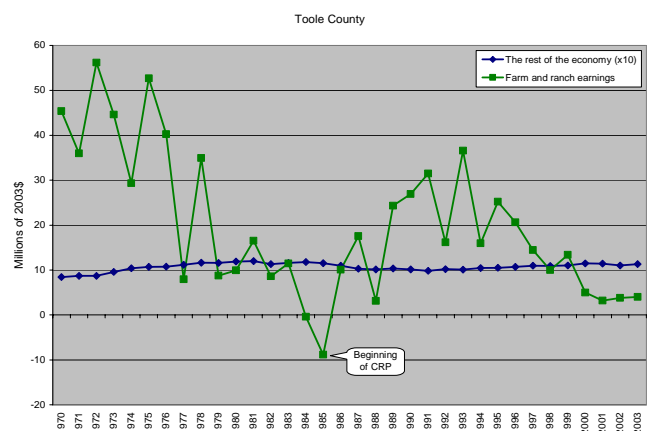
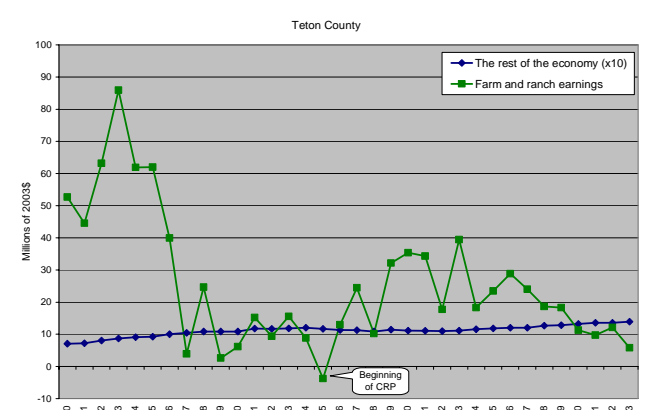
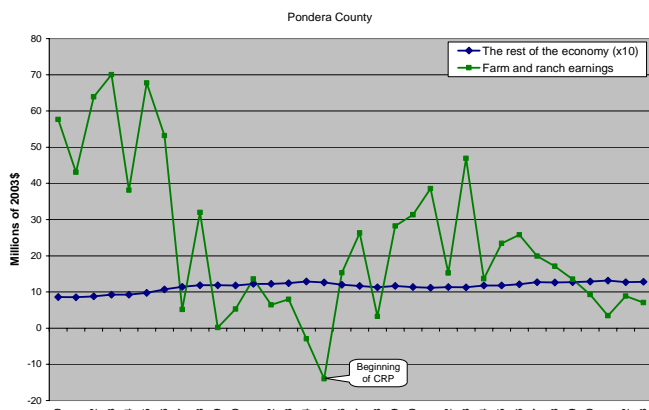
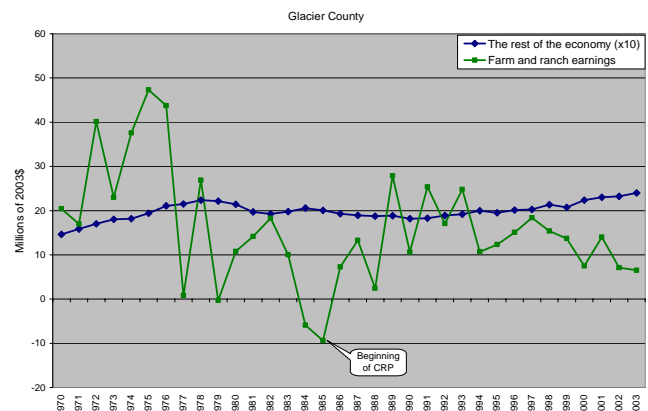
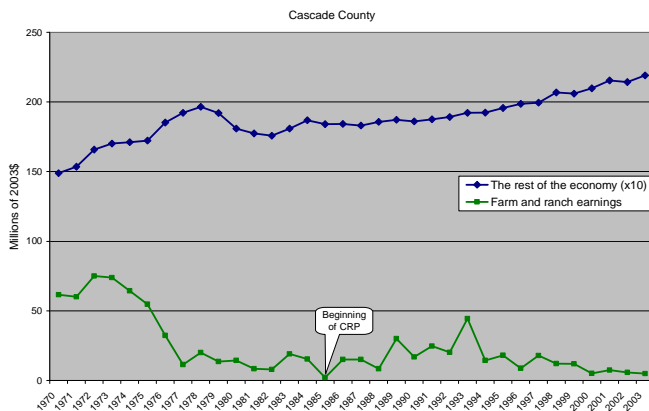
Regardless of large-scale studies of this type, and the obvious growth of the rest of the economy in the Sweetgrass region during years of declining farm income, the impact on small farm-dependent communities, and on the owners of implement dealerships and other farm service providers, can be significant. In one of the listening sessions a farmer referred to CRP as the "Community Reduction Program." When acreage lies idle, the result is fewer jobs for farmers and farm workers, fewer farm inputs sold (e.g., seed, fertilizer, equipment), and there are fewer people in rural communities to shop in local stores. Together with competition for retail trade with the "Big Box" stores in Great Falls, the CRP program has not been kind to local retailers and service providers.

The Conservation Reserve Program is a mixed blessing. On a nationwide or even regional scale, the long-term impact of CRP may be difficult to measure among the reasons rural communities are in decline. Yet there clearly are benefits. CRP has resulted in increased wildlife production. It can also be argued that idling land through CRP is a better option than federal buyout programs or conversion of the land to other uses, such as residential subdivisions. And CRP can also come in handy during times of drought, reducing the need for crop related drought relief.<sup>24</sup>

While CRP has proved to be a safety net for farmers, the impact on communities is a different story. According Ralph Peck, director of the Montana Department of Agriculture, who was quoted in a story by the Casper Star Tribune: "It's had a major impact in Montana," Peck said, "The folks who used to buy inputs no longer do. Main Street Montana has really felt the impact." On a more cautionary note, in the same story Montana State University Professor Jim Johnson acknowledges CRP has negatively

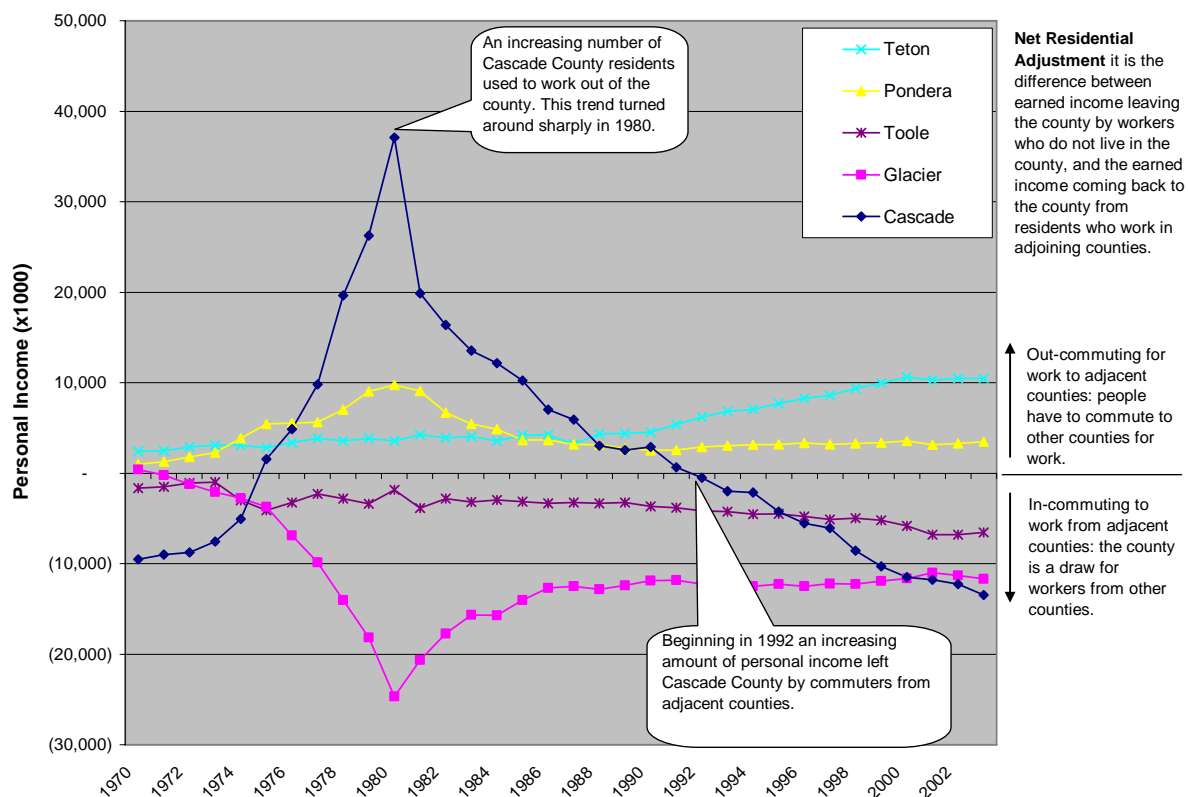
impacted rural communities; but also he points out that drought and low commodity process have played a negative role.<sup>25</sup>

As the figures below illustrate, farm income (in real terms) increased in the years after the creation of CRP before trailing off again. This makes clear that CRP is not the only factor affecting farm income. Weather, commodity cycles, the cost of inputs and international demand also play a significant role in determining commodity prices.



	% Change 1985 - 1990
in Millions of 2003\$	
<b>Cascade County</b>	
Personal income	2%
Farm earnings	715%
<b>Glacier County</b>	
Personal income	1%
Farm earnings	213%
<b>Pondera County</b>	
Personal income	30%
Farm earnings	324%
<b>Teton County</b>	
Personal income	29%
Farm earnings	1039%
<b>Toole County</b>	
Personal income	20%
Farm earnings	405%

## Cross-County Flow of Personal Income (from Commuting)

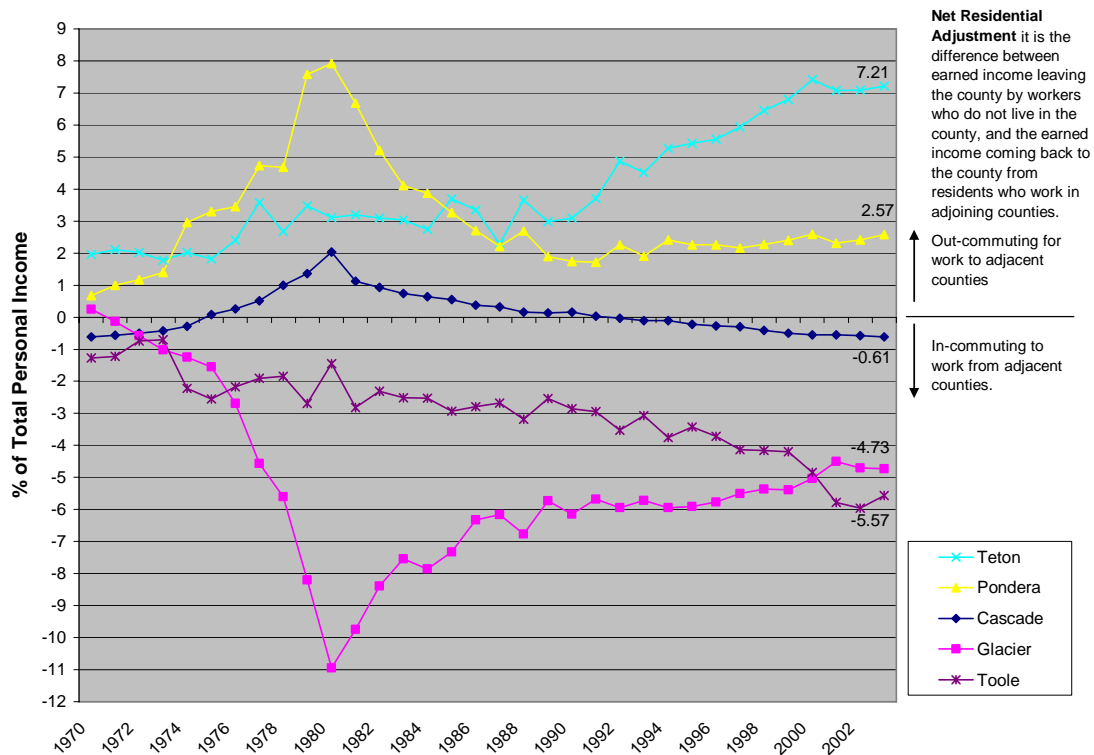


This figure above shows the net difference between the flow of personal income leaving the county by people who do not live in the county, and the inflow of dollars from county residents who work in adjoining counties. Cascade County, for example, used to have more income flowing out of the county from residents who out-commuted; i.e., the trend in the 1970s was to leave the county for work. By 1980 this began to turn around. By 1992 the county became a net draw for workers from adjacent counties.

Cascade, Glacier and Toole counties have more personal income from non-residents who commute *into* the county for work than income from residents who commute *out* of the county for work. The opposite is true for Teton and Pondera counties.

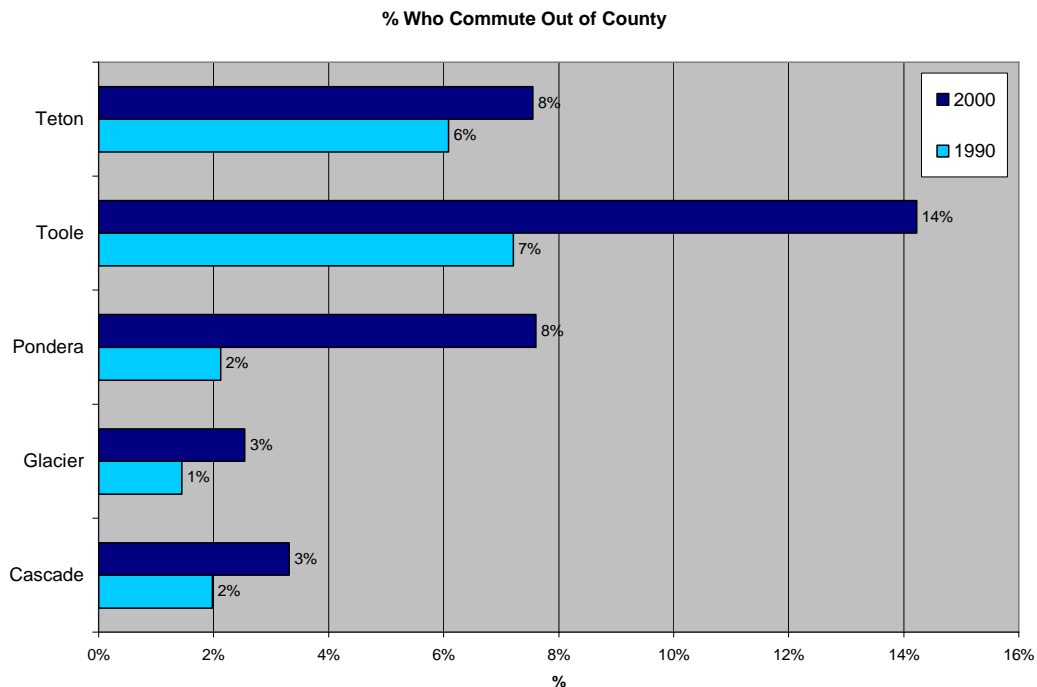
The figure on the following page illustrates the same long-term trend, depicted in terms of the percent of total personal income from out-commuters, or leaves via in-commuters. Teton County has the most out-commuting to work (these residents are going to Cascade County – see Appendix A). However, this represents only 7.2 percent of total personal income. For the other four counties it is even lower. This analysis reveals a remarkable aspect of the Sweetgrass region: as measured by the flow of personal income, there is very little commuting across county boundaries.

## Cross-County Income as a % of Total Personal Income



In terms of the employment, it is more evident that out-commuting to work is increasingly important to Toole County (14% of the workforce in 2000, up from 7% in 1990), as well as Teton and Pondera counties. However, the percent of the workforce that commutes to other counties is small in four of the five counties: Cascade (3%), Glacier (3%), Pondera (8%); and Teton (8%).

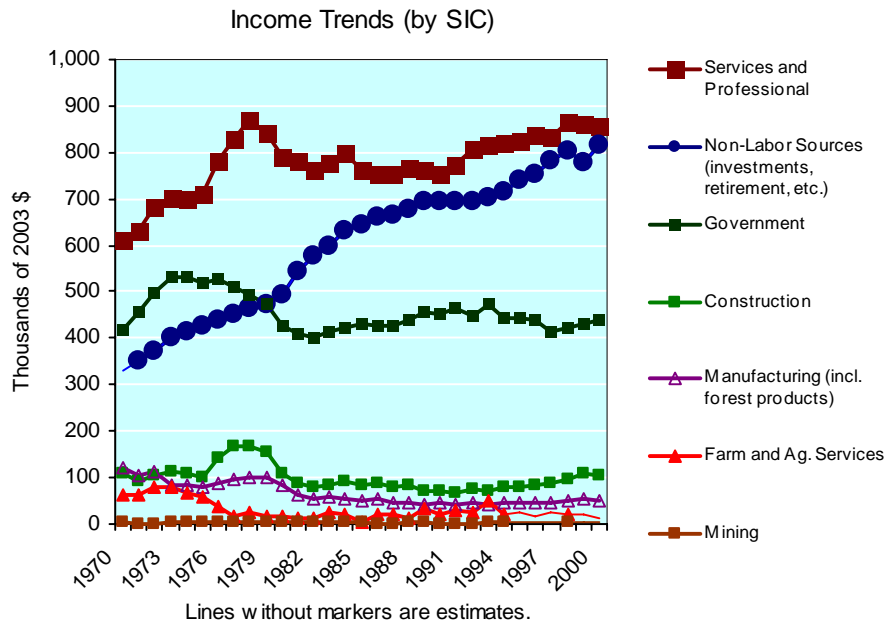
NOTE: for a detailed view of where county residents commute to for work, see Appendix A.



## CASCADE COUNTY

### Personal Income

NOTE: historical figures available from 1970 to 2000 only.<sup>26</sup>



The income category whose share of total gained the most was non-labor income, which went from 21.4 percent in 1970 to 38.8 percent in 2000 (this declined to 35% in 2003). Non-labor income accounts for 54 percent of new personal income from 1990 to 2000. The second fastest growing category was Service and Professional (45 percent of new income), a category consisting of a mix of low and high-wage occupations (e.g., hotel workers, doctors, lawyers, financial specialists). Over 20 percent of personal income in the county is from government employment (includes Malmstrom Air Force Base).

New Income by Type						
All figures in millions of 2000 dollars	1990	% of Total	2000	% of Total	New Income 1990 to 2000	% of New Income
Total Personal Income*	1,877		2,103		226	
Farm and Agricultural Services	23	1.2%	14	0.7%	-8	NA
Farm	17	0.9%	5	0.2%	-12	NA
Ag. Services	5.6	0.3%	9.2	0.4%	4	2%
Mining	1.6	0.1%	4.0	0.2%	2	1%
Manufacturing (incl. forest products)	44	2.3%	52	2.5%	8	4%
Services and Professional	755	40.2%	857	40.7%	102	45%
Transportation & Public Utilities	91	4.9%	80	3.8%	-11	NA
Wholesale Trade	83	4.4%	75	3.6%	-8	NA
Retail Trade	175	9.3%	174	8.3%	0	NA
Finance, Insurance & Real Estate	71	3.8%	116	5.5%	46	20%
Services (Health, Legal, Business, Oth.	335	17.9%	410	19.5%	75	33%
Construction	70	3.7%	105	5.0%	35	15%
Government	453	24.1%	440	20.9%	-13	NA
Non-Labor Income	694	37.0%	815	38.8%	121	54%
Dividends, Interest & Rent	406	21.6%	469	22.3%	63	28%
Transfer Payments	288	15.3%	346	16.5%	59	26%

\*The sum of the above categories do not add to total due to adjustments made for place of residence and personal contributions for social insurance made by the U.S. Department of Commerce.

## Wages and Employment

NOTE: latest figures available.

<b>Wages and Employment in 2003</b> <b>(Private Sector Only)</b>			
	Employment	% of Total	Average Annual Pay
Total, all industries	27,271	100%	24,637
Goods-Producing	2,792	10%	32,378
Natural Resources and Mining (Incl. Ag.)	128	0.5%	20,800
Construction	1,711	6%	32,243
Manufacturing	953	3%	34,176
Service-Providing	24,479	90%	23,755
Trade, Transportation, and Utilities	7,555	28%	24,282
Information	729	3%	30,903
Financial Activities	2,588	9%	30,766
Professional and Business Services	2,227	8%	30,711
Education and Health Services	5,705	21%	28,033
Leisure and Hospitality	4,528	17%	10,349
Other Services	1,145	4%	18,038

On average, the Goods-Producing industries have the highest wages in Cascade County, driven primarily by the Construction and Manufacturing sectors. The highest-paid Service-Providing industries are Information, Financial Activities, and Professional and Business Services, together accounting for 20 percent of the private sector. Another 21 percent consists of Education and Health Services, which also pay above average wages.

### Key Characteristics of Cascade County:

An older population: The population has gotten older since 1990. The median age in 2000 was 36.7 years, up from 32.7 years in 1990. The age group that has grown the fastest, as a share of total, is 45 to 49 years, up 1,468 people. In 2000 there were more adults between 35-49 (18,397; baby boomers) than children between 10-19 (12,118).

Income is more evenly distributed: In 1999, for every household that made over \$100,000, there were 8.4 households that made under \$30,000. Ten years earlier, for every household that made over \$100,000 there were 27.4 households that made under \$30,000.

Per capita income higher than state: In 2003, per capita income in Cascade County (\$27,523) was higher than the state (\$25,406) and lower than the nation (\$31,472).

Most businesses are small: In 2001, 87 percent of the firms had fewer than 20 employees.

Military and health care are key players: In 2003 personal income from people employed in the military represented 12 percent of total personal income in the county. This ties the health care industry (also at 12% of total) as the largest sources of personal income. The third highest sector is retail trade, representing 6 percent of total personal income.

### **Other characteristics of Cascade County (Health, Housing, Public Safety, Education and Schools, Environmental Issues):**

Cascade County has a city-county joint health department and a Community Health Care Center dedicated to “*the prevention of disease, promotion of good health practices and protection of the environment, delivered with respect, for every person in Cascade County through efficient and effective use of resources.*” The CHCD provides basic health and dental services, especially for citizens with limited insurance and incomes. The five areas that the Cascade City-County Health Dept focuses on are:

- Community and Family
- Communicable Disease Prevention
- Health Promotion/Chronic Disease Prevention
- Environmental Health
- Public Health

The health department include services such as Teen Pregnancy Prevention, Day Care Services, WIC, Food Safety and Public Water Safety Inspections, Junk Vehicle Removal, Subdivision Review and Emergency Response.<sup>27</sup>

According to the 2000 U.S. Census, there are over 35,000 housing units in Cascade County, at least 32,500 of which are occupied. These units house approximately 78,500 residents. 65 percent of these units are owner occupied and 35 percent are renter occupied.<sup>28</sup> The Great Falls Housing Authority serves over 1000 residents who are in need of low or moderately low income housing. There are five low income sites and one affordable housing site within the Great Falls city limits. The Great Falls Housing Authority also administers almost 200 vouchers for housing, serving approximately 528 family members. The U.S. Department of Housing and Urban Development have identified the Great Falls Housing Authority as a ‘High Performer’.<sup>29</sup>

Through the Community Development Department, the city of Great Falls also provides Housing Loan Programs, such as Deferred Payment and Rental Improvement Loans. Other programs available through Community Development are designed to meet housing and community development needs on a larger scale. These programs are funded by the U.S. Department of Housing and Urban Development through the Community Development Block Grant (CDBG) and HOME Investment Partnership (HOME) grant funds and are received on an annual basis. For the current year (Fiscal Year 2005/2006), the City of Great Falls will receive \$1,092,496 in CDBG funds and \$435,726 in HOME funds.<sup>30</sup>

There are 42 public schools in Cascade County, ranging in student population from fewer than 20, in Ulm 7<sup>th</sup> and 8<sup>th</sup> Grade School and Fair Haven Colony School, to Great Falls High School, which has almost 2000 students.<sup>31</sup> Great Falls School system includes two traditional high schools, one alternative high school, two middle schools and 15 elementary schools. The City of Great Falls also houses seven private schools.<sup>32</sup>

In Cascade County there are various recreational, cultural and entertainment opportunities. Most noteworthy is Montana ExpoPark, which covers more than 130 acres. The Park is owned by the County and hosts the Montana State Fair, Montana Pro Rodeo Circuit Finals, livestock and equestrian shows, as well as weddings, craft and trade shows, sporting events and other activities. There are 15 sites in Cascade County registered in the National Register of Historic Places, including various homesteads, the Fort Shaw Historic District and Cemetary, and the Great Falls Historic Railroad District.<sup>33</sup> Within Cascade County there are numerous city, state and federal parks as well; such as Cow Island and Slaughter River Recreation Areas, both managed by the Bureau of Land Management, which host outdoor recreation. Other parks, such as the Riverside Railyard Skate Park, with 27,000

feet of full bowls, curves, spines and rails, cater to a different crowd.<sup>34</sup> Recreation in Great Falls is also widely varied; from the after-school and child oriented activities at the Community Recreation Center, to the public swimming pools, golf courses, and national forest.<sup>35</sup> Approximately 4 miles outside of Great Falls is the Great Springs State Park, where day-use visitors picnic by the Missouri River, visit the fish hatchery and visitor center, take walks and use various fishing accesses along the Missouri.<sup>36</sup> Also in Cascade County visitors would find Sluice Boxes, Smith River-Camp Baker, Tower Rock and Ulm Pushkin State Parks. Each of these parks offers various recreational opportunities, including floating, fishing, camping, wildlife viewing and walks through historic mines, or bison kill sites.<sup>37</sup>

There are two Environmental Protection Agency Superfund sites in Cascade County. Carpenter-Snow Creek site is located near the town of Neihart in the Little Belt Mountains southeast of Great Falls. The site is an historic mining district, and includes approximately 96 abandoned mines, 21 of which are probable sources of contamination to surface water. Due to the heavy impact of mining activities in the area, groundwater, soils and some streams are contaminated with heavy metals and arsenic. Although contaminant levels in the nearby surface water, such as Belt Creek, Carpenter Creek and Snow Creek, are not above standards considered unhealthy for aquatic life or safe recreational use, concentrations of lead and arsenic are above screening levels in some residential areas.<sup>38</sup> The Barker-Hughesville site is located in Cascade and Judith Basin Counties. This site is also in a historic mining district and affects the area's groundwater, soils and surface water, which are now contaminated with heavy metals and arsenic. The greatest concern is dissolved zinc. At this site, Galena Creek is one of the most impacted surface streams. There is no fishery or aquatic insect life in Galena Creek because of the impact of mining wastes.<sup>39</sup>

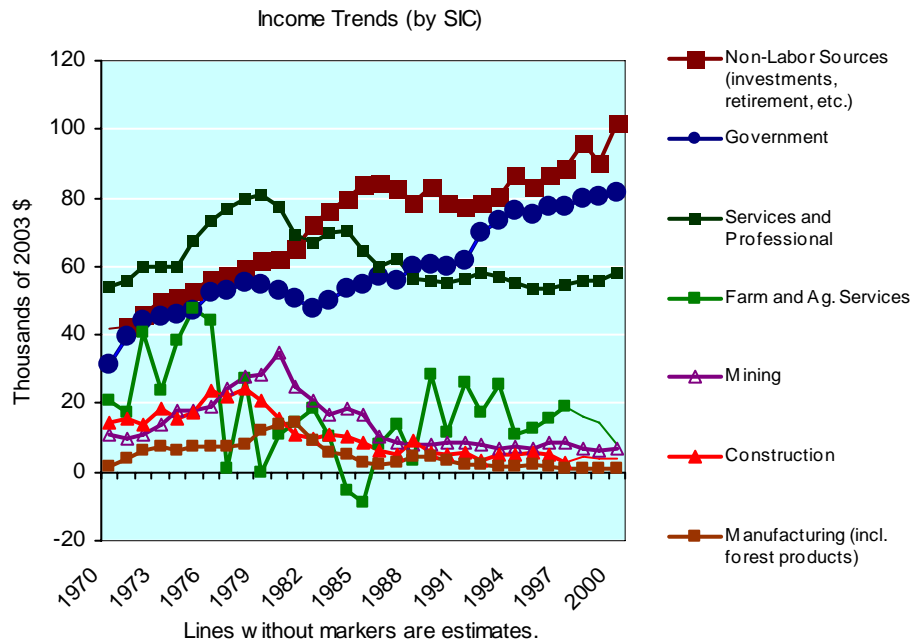
Cascade County is home to 296 abandoned mine sites. These are all located within the Belt, Smith and Upper Missouri watersheds. The county also houses 42 Montana Department of Environmental Quality Remediation Response sites. These include abandoned railyards with buried fuel tanks, waste tailing sites, wood processing plants, an active herbicide plant, active Air National Guard and National Guard stations, inactive landfills, oil refineries and leaking sewage sites. There are 11 landfills in Cascade County, only one of which is open to the public. There are also a number of private conservation easements— accounting for 22,280 acres. In addition the Montana Fish, Wildlife and Parks Department manages 2,434 acres of conservation easements on private lands. These easements account for 1.4 percent of the acreage in the county.<sup>40</sup>

In Cascade County there are also two threatened species under the Endangered Species Act. These are *Haliaeetus leucocephalus*, or the Bald Eagle, and *Lynx canadensis*, or the Canada Lynx. The bald eagle has its primary habitat in riparian and lacustrine areas (forested areas along rivers and lakes) and in wetlands, near major water bodies, and open water areas. Nesting sites are dependent on local food availability and minimum human disturbance, as well as tall, large diameter trees. The Montana Bald Eagle Management Plan directs the protection and repopulation of nesting pairs in the area.<sup>41</sup> The Canada lynx lives in subalpine forests, hunting in the winter through the range of the snowshoe hare, and in areas with dense and consistent snowfall. Lynx are found in populations of less than 10 in a 100 kilometer area and they range widely for food sources. In Montana, lynx are classified as a furbearing species but are currently not hunted because of their threatened status. On federal lands in the area, the Canada Lynx Conservation Assessment and Strategy manages critical habitat and lynx population.<sup>42</sup>



## GLACIER COUNTY

### Personal Income



The fastest source in new income in Glacier County has been from non-labor sources, representing 60 percent of the net growth from 1990 to 2003 (and 44% of total personal income in 2003). The second fastest source of new jobs has been in Government. Service and Professional industries grew significantly in the late 1970s, then declined in the 1980s, and were stable through the 1990s.

New Income by Type							
All figures in millions of 2000 dollars	1990	% of Total	2000	% of Total	New Income 1990 to 2000	% of New Income	Change in Share
Total Personal Income*	193		231		38		
Farm and Agricultural Services	11	5.8%	8	3.5%	-3	NA	
Farm	11	5.5%	7	3.2%	-3	NA	
Ag. Services	0.6	0.3%	0.6	0.3%	0.1	0%	
Mining	8.6	4.5%	7.1	3.1%	-2	NA	
Manufacturing (incl. forest products)	3	1.6%	1	0.3%	-2	NA	
Services and Professional	55	28.5%	58	25.2%	3	8%	
Transportation & Public Utilities	11	5.5%	12	5.2%	2	4%	
Wholesale Trade	7	3.4%	3	1.4%	-3	NA	
Retail Trade	15	7.9%	15	6.5%	0	NA	
Finance, Insurance & Real Estate	3	1.7%	3	1.1%	-1	NA	
Services (Health, Legal, Business, Oth.	20	10.1%	25	10.9%	6	14%	
Construction	5	2.7%	4	1.7%	-1	NA	
Government	60	31.0%	81	35.2%	22	57%	
Non-Labor Income	79	40.8%	102	44.1%	23	60%	
Dividends, Interest & Rent	38	19.6%	37	15.8%	-1	NA	
Transfer Payments	41	21.3%	65	28.3%	24	63%	

\*The sum of the above categories do not add to total due to adjustments made for place of residence and personal contributions for social insurance made by the U.S. Department of Commerce.

## Wages and Employment

Wages and Employment in 2003 (Private Sector Only)			
	Employment	% of Total	Average Annual Pay
Total, all industries	2,040	100%	21,348
Goods-Producing	216	11%	29,163
Natural Resources and Mining (Incl. Ag.)	106	5.2%	29,374
Construction	96	5%	31,289
Manufacturing	14	1%	13,320
Service-Providing	1,823	89%	20,421
Trade, Transportation, and Utilities	644	32%	26,298
Information	31	2%	8,563
Financial Activities	76	4%	26,655
Professional and Business Services	104	5%	17,869
Education and Health Services	205	10%	24,386
Leisure and Hospitality	678	33%	14,422
Other Services	84	4%	15,868

The average earnings per job in Glacier County (previous figure) were \$28,708 in 2003 – including both private and government employment. Average wages for private sector employment alone (figure directly above) is significantly lower: \$21,348, which indicates government jobs are pulling average wages up in the county. The highest wages in the private sector are in Construction (\$31,289) and Natural Resources and Mining (\$29,163; which includes the Agricultural sector). The highest Service-Producing wages are in Financial Activities (\$26,655, but with few workers), and Trade, Transportation and Utilities (with 32% of the private sector workforce).

Key characteristics of Glacier County:

Slightly older population, but also many teenagers: The population has gotten older since 1990. The median age in 2000 is 30.6 years, up from 28.3 years in 1990. However, the largest age brackets are children between 10 and 19 years of age (2,805). There are only slightly more adults between the ages of 35-49. Using the same age brackets, on the Blackfeet Indian Reservation there are more children /teenagers (2,057) than adults (1,778).

Income is more evenly distributed: In 1999, for every household that made over \$100K, there were 17.4 households that made under \$30K. Ten years earlier, for every household that made over \$100K, there were 438.0 households that made under \$30K. However, for both Census periods the single largest income bracket for households was less than \$10,000/year. As the discussion below shows, poverty is a persistent problem in the Native American portion of Glacier County.

Per capita income is low: In 2003, per capita income in Glacier County, Montana (\$18,549) was lower than the state (\$25,406) and the nation (\$31,472).

Most businesses are small: In 2001, 92 percent of the firms had fewer than 20 employees.

## THE BLACKFEET INDIAN RESERVATION

On the surface, Glacier County appears to be doing well economically. The percent change in the population, from 1990 to 2003, was the highest in Glacier County (9%). During that time it had the second fastest growth in employment (15%), the highest percent growth (28%) in real personal income, and the second highest growth in average earnings average earnings per job (6%). As with other counties, over the last three decades Glacier County has seen fast growth in service industries and non-labor sources of income.

However, Glacier County also has the lowest percent of college graduates (at 16% it is still above the national median of 14.5%), and the highest unemployment rate (8%). According to a Bureau of Indian Affairs labor force survey, conducted every two years on the Blackfeet Reservation, the unemployment rate for the reservation was 62.5% in 2000. This means that over 3000 people are without jobs, despite their availability to work.<sup>43</sup>

The table below shows comparative statistics from the 2000 Census for Glacier County (which includes reservation and non-reservation land), the Blackfeet Reservation, the reservation town of Browning, and the mostly non-Native American town of Cut Bank.

NOTE: the Census information is dated. In several focus groups the accuracy of the information has been questioned due to variable response rates based on an uneasy history with the Census. Because of these discrepancies, the following table is best used to illustrate differences between areas, rather than to highlight specific numbers.

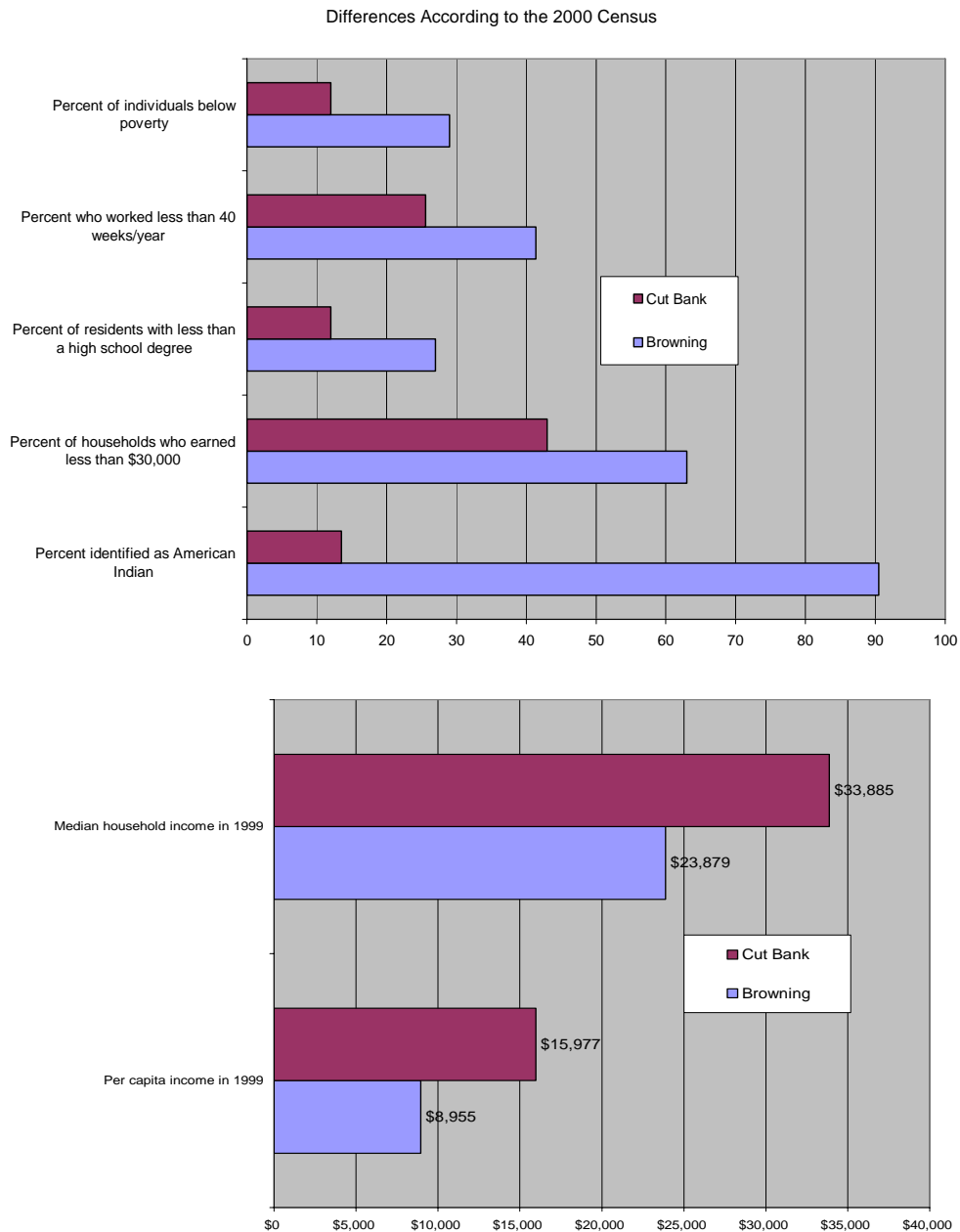
	Glacier County	Blackfeet Reservation	Browning	Cutbank
Percent identified as American Indian	61.8	83.8	90.5	13.5
Percent employed in education, health and social services	31	33	42	29
Percent employed in public administration	15	21	18	6
Percent who work in the county	95	97	99	92
Percent who work in town	44	22	79	67
Percent who lived in a different county in 1995	13	16.3	15	15
Percent of individuals who earned less than \$10,000	77	81	87	70
Per capita income in 1999	\$11,597	\$9,927	\$8,955	\$15,977
Percent of households who earned less than \$30,000	53	59	63	43
Median household income in 1999	\$18,598	\$24,739	\$23,879	\$33,885
Percent of income from wages and salaries	70.4	71.2	69.9	70.3
Percent of income from public assistance	1.1	1.8	1.5	0.1
Percent of residents with high school degree	27	25	23	32
Percent of residents with less than a high school degree	21	26	27	12
Percent of residents with college degree or higher	16	13	15	22
Percent who worked 50 - 52 weeks/year	51.9	47.4	48.5	58.9
Percent who worked less than 40 weeks/year	36.6	43.6	41.4	25.6
Families with two or more workers	55	52	50	63
Percent of individuals below poverty	27	33	29	12

The contrast between Cut Bank, in the non-reservation portion of Glacier County, and the Blackfeet Reservation emphasizes the differences in economic conditions between Native American and non-Native populations.

According to the Bureau of the Census, compared to the town of Cut Bank, the population of Browning suffers from higher poverty, lower family income, dramatically higher unemployment, and low education levels.<sup>44</sup> Approximately 37 percent of adults have a high school diploma, while 12 percent have a less than ninth grade education. Less than 3 percent of the population has a four-year degree of any kind. On average the number of high school students who drop out each year is

approximately 200.<sup>45</sup> Workers in Browning work fewer hours per year compared to workers in Cut Bank. Responses from the focus group in Browning indicate that for many tribal members, earning income is less important than being close to family, working on community-wide projects, and revitalizing the health and heritage of the tribe. Although these data may not reflect the full story, they illustrate the economic difficulties facing tribal members.

The most striking of the differences are illustrated in the figures below.



## Entrepreneurship in Native Communities

A 2004 study conducted by CFED, a nonprofit organization dedicated to expanding economic opportunity, explores native entrepreneurship in rural communities. The study emphasizes the importance of cultural context, education and training assistance, policy development, access to markets and native networking to the success of native entrepreneurship. The study also finds that in order for native entrepreneurship to flourish, businesses need to be community-driven, regionally-oriented, and supported by public policy.<sup>46</sup>

Entrepreneurship and small business development hold promise as strategies to alleviate poverty and increase economic opportunity. To succeed in a Native American context support for entrepreneurship must emphasize the role of community and cooperation, as well as tribal, family, and group relationships. An entrepreneurship strategy should therefore account for individual initiative that will benefit the entire community.

The American Indian Business Leaders organization describes the difference in native and non-native business models, explaining the need to merge the less materially-driven, contentment-oriented, group-focused, and relationship-based native model with the assertive, competitive and achievement-oriented non-native model.<sup>47</sup> The CFED study explains that federal, state and tribal policies that foster training, development of tribal codes, and partnerships are another important element in the growth of native entrepreneurship.<sup>48</sup>

The Harvard Project on American Indian Economic Development found that most development policies have failed due to: an emphasis on business start-up rather than maintenance, a lack of attention paid to tribal political environments, and a recognition of culture only as a resource to be sold rather than as a guiding principle for development strategies.<sup>49</sup>

Access to capital and access to markets can also prevent native business from flourishing. The CFED study notes that there is an absence of affordable capital in many native communities, often due to a lack of competitive interest rates, a refusal to make loans, or financial institutions which simply do not offer start-up businesses loans. Trust land (which cannot be used by tribes for mortgages or leased without the approval of the Secretary of the Interior) makes the lending process complicated for tribal members. Although they are growing, there is also a lack of alternative financing options for rural tribes, such as community development loan funds, venture capital funds and credit unions.<sup>50</sup>

Education about financial process and business practice is another barrier to economic success in tribal communities. Education is needed, both on the part of financial institutions who work within tribal communities, and for tribal leaders and teachers, to learn to navigate financial processes.<sup>51</sup> The CFED study identified culturally appropriate youth entrepreneurship curricula, business administration courses, and partnerships with regional native networks as viable training options.<sup>52</sup>

Other important factors to building successful native economies include: an information infrastructure, where access to data about business starts, business success, and churning rates are available in a centralized and comprehensive resource; and the promotion of partnerships with federal, state and regional government agencies.<sup>53</sup>

## **Other characteristics of Glacier County (Health, Housing, Public Safety, Education and Schools, Environmental Issues):**

Glacier County Health Department provides various health services to its residents. These include: WIC (Women, Children and Infants); a training and aid services for mothers and their children, TLC, Inc; a series of educational services that promote a chemical free lifestyle; as well as SAR (Search and Rescue) and EMS (Emergency Medical Services), both of which are focused on emergency health situations.<sup>54</sup> The Northern Rockies Medical Center and Nursing Home, which has 20 beds, and over 30 registered nurses, is located in Cut Bank. Browning is home to the Blackfeet Hospital, which has 25 beds and is operated by Public Health Service Indian Service.<sup>55</sup> In Browning there is also the Blackfeet Tribal Health Department, whose mission is; “... *to improve the quality of health care systems and evaluate the health status of the Blackfeet people to the highest possible level.*”<sup>56</sup> The Blackfeet Tribal Health Department administers 638 health contracts, acts as a liaison between Blackfeet Tribal Health and Indian Health Services, serves as a mediator for health complaints, and coordinates utilization of health services among other activities.<sup>57</sup> In addition, there is Senior Assisted Housing and Low Income Housing available in the town of Cut Bank. There are over 5000 housing units in Glacier County, approximately 62 percent of which are owner-occupied.<sup>58</sup>

There are sixteen public schools in Glacier County, ranging in size from fewer than 20, such as the Big Sky School in Cut Bank, to over 400 at the Napi School in Browning.<sup>59</sup> The Blackfeet Community College, located in Browning, is a public two-year Tribally Controlled Community College located on the Blackfeet Indian Reservation. The BCC was established through a Tribal Charter in 1974. In 1994, BCC was granted “Land Grant” status. The goal of the Blackfeet Community College is to provide post-secondary and higher educational services to the Blackfeet Nation and surrounding communities.<sup>60</sup> Also in Browning is the Niz Puh Wah Sin School, a private school with a Native student population.

There are various police forces in Glacier County. Within the city of Cut Bank there are 6 City Officers and 3 Reserve Officers. There are 8 County Deputies as well.<sup>61</sup> The Blackfeet Tribal Police have jurisdiction over Blackfeet Indian reservation, although any cases that involve non-members of the Blackfeet Nation are under county jurisdiction.<sup>62</sup>

Within Glacier County there are various places to visit and recreate. Cut Bank has 4 public parks, a public swimming pool, library, three local museums and a national historical site. The Museum of the Plains Indian, founded in 1941 to promote contemporary Indian arts, is operated by the Northern Plains Indian Crafts Association, an independently owned and operated Indian business.<sup>63</sup> The Lodgepole Gallery and Tipi Village provides a various number of activities for tourists: from herbal and nature walks that describe traditional Blackfeet activities and guided hunting and fishing and horseback riding to overnight stay in tepees. Guided tours to interesting cultural spots, like Head-Smashed in Buffalo Jump are also available.<sup>64</sup> Finally, the Glacier County Historical Society Museum, incorporated in 1980, houses collections from life in Glacier County from ages past. The purpose of the Society is to provide the people of Glacier with an appreciation of their heritage and methods for preserving their history.<sup>65</sup>

In Browning, at the heart of the Blackfeet Reservation, there are also various cultural and recreational activities available. Browning is known as the last encampment of "The Lords of the Great Plains", or the Blackfeet Indian Tribe. Browning and its environs are well known for the assortment of opportunities they offer to outdoor recreationalists. Hunting and fishing, golf, camping, hiking, rodeos, and two annual native celebrations occur during the summer and fall seasons; while in the winter tourists can enjoy snowmobiling, ice fishing, and cross-country skiing.<sup>66</sup> Glacier County is also home to Glacier National Park. The Park, managed by the National Park Service, has over a thousand camping areas for visitors. Biking, boating, backpacking, horseback riding, skiing, fishing and hiking

are all activities that go on during the course of the year at Glacier National Park. In addition, in 1932 Glacier and Waterton Lakes National Park, in Canada, were designated Waterton-Glacier International Peace Park. They were both designated Biosphere Reserves in 1976 and World Heritage sites in 1995.<sup>67</sup> These designations recognize the uniqueness of the region: a place where ecological diversity of international importance exists, but where humans co-exist with the natural landscape and there is support from local and national governments to manage the areas to the best possible benefit of human and the environment. A Biosphere Reserve is designated by UNESCO.<sup>68</sup>

In Glacier County there are four species listed as threatened under the Endangered Species Act, two of which have designated or proposed critical habitat. There is also one endangered species, *Canis Lupis*, the Grey Wolf, and one candidate species, *Botrychium lineare*, or Slender Moonwort. The grey wolf has been known to move seasonally anywhere from 70 to 500 miles in search of habitat with very little human disturbance, and of food sources. Montana wolves regularly roam into Canada, Idaho and Wyoming. In Montana, wolves have themselves as lower elevation and closer to human habitat than other states. Wolves are opportunistic carnivores. The first den of grey wolves documented in over 50 years was found in Glacier National Park in 1986. Since that time they have been reintroduced in several areas in the state and have reached population target. The wolf population is managed jointly by the U.S. Fish and Wildlife Service and the Montana Fish, Wildlife and Parks Department, under the Montana Gray Wolf Conservation and Management Plan.<sup>69</sup>

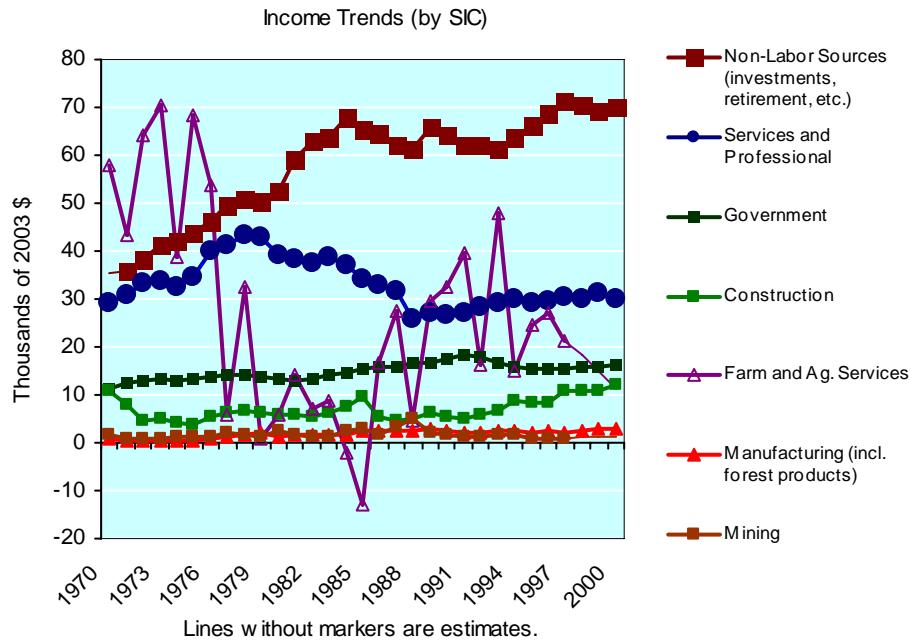
Glacier County has nine abandoned mine sites, six of which are within the Cut Bank watershed, and three of which are in the Milk River Headwaters area. There are also 16 Montana Department of Environmental Quality Remediation Response sites. Although some of them are related to crude oil releases and spills, others have to do with wood processing in the county, as well as inactive defense facilities. There are 162 miles of crude oil pipeline within Glacier, owned by four companies. There are 7 landfills and, at present, all are closed. The conservation easements within Glacier County account for 0.2 percent of the acreage: 4,396 acres are managed by the U.S. Fish and Wildlife Service, and 509 acres are under private easement.<sup>70</sup>

The four threatened species in Glacier County are the bald eagle, grizzly bear, Canada lynx, and the bull trout (*Haliaeetus leucocephalus*, *Ursus arctos horribilis*, *Lynx canadensis*, and *Salvelinus confluentus*). The bald eagle population in Montana and Glacier County has improved in recent years, due in large part to The Montana Bald Eagle Management Plan. This plan is implemented by the Montana Bald Eagle Working Group, which is made up of representatives from federal and state agencies, tribes, universities, conservation groups and private industries.

The grizzly bears are adaptable omnivores and range through meadows, seeps, riparian zones, mixed shrub fields, as well as closed and open timber. The bear population is managed by limiting interactions between bears and humans and protecting and expanding habitat. Bears will eat a wide variety of foods, from carrion, berries, fruits and fish, to rodents, sedges and garbage. This omnivorous diet can bring bears within range of human populations. Grizzlies live in the Northern Rockies area and are often ranging through the North Continental Divide and the Bob Marshall Wilderness into Glacier County and other areas along the Rocky Mountain Front.

The Canada lynx ranges throughout the seasons, following prey. Lynx are sparsely populated and are currently not hunted because of their threatened status. On federal lands in the area, the Canada Lynx Conservation Assessment and Strategy manages critical habitat and lynx population.<sup>71</sup> Bull trout are found in large river drainages and can be both migratory and can reside in particular streams for their entire lives. Migratory individuals can move great distances (up to 156 miles) among all types of surface water, while stream-resident bull trout migrate within tributary stream networks for spawning purposes only. Open migratory corridors, among tributary streams, and larger rivers and lake systems are critical for maintaining bull trout populations.<sup>72</sup>

## PONDERA COUNTY Personal Income



From 1990 to 2003 total personal income in Pondera County fell by over \$7 million (personal income fell further to \$135 million in 2003). Income from Agriculture, one of the staples of the county's economy, has declined by over \$21 million in the last three decades. The fastest source of growth in the county is in non-labor sources, such as retirement income and money earned from investments. Like Glacier County, personal income from Services and related industries grew in the early 1980s, then declined until 1988, and is today steady, representing over 20 percent of personal income.

New Income by Type						
All figures in millions of 2000 dollars	1990	% of Total	2000	% of Total	New Income 1990 to 2000	% of New Income
Total Personal Income*	145		138		-7	
Farm and Agricultural Services	32	22.3%	11	8.0%	-21	307%
Farm	31	21.6%	9	6.7%	-22	317%
Ag. Services	1.1	0.7%	1.8	1.3%	1	NA
Mining	1.8	1.2%	1.3	1.0%	0	6%
Manufacturing (incl. forest products)	2	1.7%	3	2.1%	0	NA
Services and Professional	27	18.3%	30	21.7%	3	NA
Transportation & Public Utilities	2	1.6%	3	2.3%	1	NA
Wholesale Trade	4	2.9%	4	2.7%	0	7%
Retail Trade	7	4.6%	7	5.4%	1	NA
Finance, Insurance & Real Estate	3	2.1%	4	2.9%	1	NA
Services (Health, Legal, Business, Oth.	10	7.2%	12	8.4%	1	NA
Construction	5	3.7%	12	8.9%	7	NA
Government	17	12.1%	16	11.6%	-1	21%
Non-Labor Income	64	44.3%	70	50.6%	6	NA
Dividends, Interest & Rent	40	27.8%	39	28.4%	-1	16%
Transfer Payments	24	16.5%	31	22.2%	7	NA

\*The sum of the above categories do not add to total due to adjustments made for place of residence and personal contributions for social insurance made by the U.S. Department of Commerce.



## Wages and Employment

Wages and Employment in 2003 (Private Sector Only)			
	Employment	% of Total	Average Annual Pay
Total, all industries	1,389	100%	22,264
Goods-Producing	338	24%	34,428
Natural Resources and Mining (Incl. Ag.)	39	3%	23,015
Construction	246	18%	38,894
Manufacturing	54	4%	22,144
Service-Providing	1,051	76%	18,350
Trade, Transportation, and Utilities	387	28%	19,704
Information	15	1%	24,564
Financial Activities	86	6%	23,456
Professional and Business Services	54	4%	21,376
Education and Health Services	295	21%	21,786
Leisure and Hospitality	156	11%	7,412
Other Services	57	4%	8,896

In Pondera County wages in the Goods-Producing industries are about \$16,000 higher per year than the Service-Providing industries. The highest paid Goods-Producing industry is Construction. The highest paid Service-Providing industry is Information Services and Financial Activities. However, few people are employed in those sectors.

Key characteristics of Pondera County:

The population has gotten older since 1990. The median age in 2000 was 38.6 years, up from 34.3 years in 1990. There are slightly more people between the ages of 35-40 (1,445) than children between 10-19 years (1,304).

Income is more evenly distributed: In 1999, for every household that made over \$100,000, there were 11.8 households that made under \$30,000. Ten years earlier, for every household that made over \$100,000, there were 46.6 households that made under \$30,000.

Per capita income is low: In 2003, per capita income in Pondera County, Montana (\$21,847) was lower than the state (\$25,406) and the nation (\$31,472).

Most businesses are small: In 2001, 95% of the firms had fewer than 20 employees.

### **Other characteristics of Pondera County (Health, Housing, Public Safety, Education and Schools, Environmental Issues):**

Pondera County Health Department provides a variety of professional health services that promote and maintain individual, group and community health. These programs include WIC, a Home Visit Program and the Health Nurse, a trained professional who provides school visits, immunizations and is responsible for public inquiries about health issues.<sup>73</sup> The Sanitarian also provides Pondera County with community health services, including the Communicable Disease Program, the Junk Vehicle Program, Food and Consumer Safety, and overseeing the Department of Environmental Quality regulations.<sup>74</sup> The Pondera Medical Center, located in Conrad, is a 20 bed acute care facility, with an extended care 59-bed capacity. The Center provides durable medical equipment service and oxygen service. There are five physicians on staff and additional visiting specialists.<sup>75</sup>

There are 17 public schools in Pondera County, and three private schools, including a Hutterite colony school and a Christian school. Many of the elementary schools in the small towns in Pondera have close to 20 students, while the high school in Conrad has over 200 students. Other high schools, such as Valier High School and Brady High School have fewer than 100 students.<sup>76</sup> Within the public schools in Pondera County the Montana State University Extension Service provides school enrichment programs in four specific areas: Family and Consumer Science, Agriculture, Youth Development and Community and Economic Development. The Extension Service also works with youth in the 4-H Program.<sup>77</sup>

There are 2,800 housing units in Pondera County, approximately 70 percent of which are lived in by the owners. Fifteen percent of the housing in the county is unoccupied. There is no housing department within the county government.<sup>78</sup> There are two sheriffs and a deputy in Pondera County, stationed in the county seat of Conrad. These officers carry out the following duties: crime investigation, preservation of the peace, carrying out court orders, serving warrants, collecting delinquent taxes, inspection of livestock brands, drug and alcohol education, road patrol and GVW permitting.<sup>79</sup>

There are abundant outdoor recreational activities available in Pondera County, although they are not set up for easy use by visitors and tourists. There are three historical markers in the county: MT 008, which marks a spot where Captian Merriweather Lewis and his team of explorers had a violent encounter with local Piegans; MT 071, which marks Dupuyer, the oldest town between Fort Benton and the Rockies; and MT 072, identifying Chief Mountain, or NINA-STA-QUAY, a revered Blackfeet landmark, and the Old North Trail, used by Northwest Plains Indians for many years.<sup>80</sup>

There are 19 abandoned mine sites in Pondera County, most of which are in the Two Medicine Creek watershed, and some of which are in the Marias River watershed. There are also 11 Montana Department of Environmental Quality Remediation Response sites, five of which are related to crude oil spills or releases from refineries. One company owns 83 miles of crude oil pipeline in the county. Although there were at one time seven open landfills in the county, now only one of them is operable. Additionally, there are 10,086 acres in the county protected by U.S. Fish and Wildlife Service conservation easements, and 2,261 acres of privately held conservation easements.<sup>81</sup>

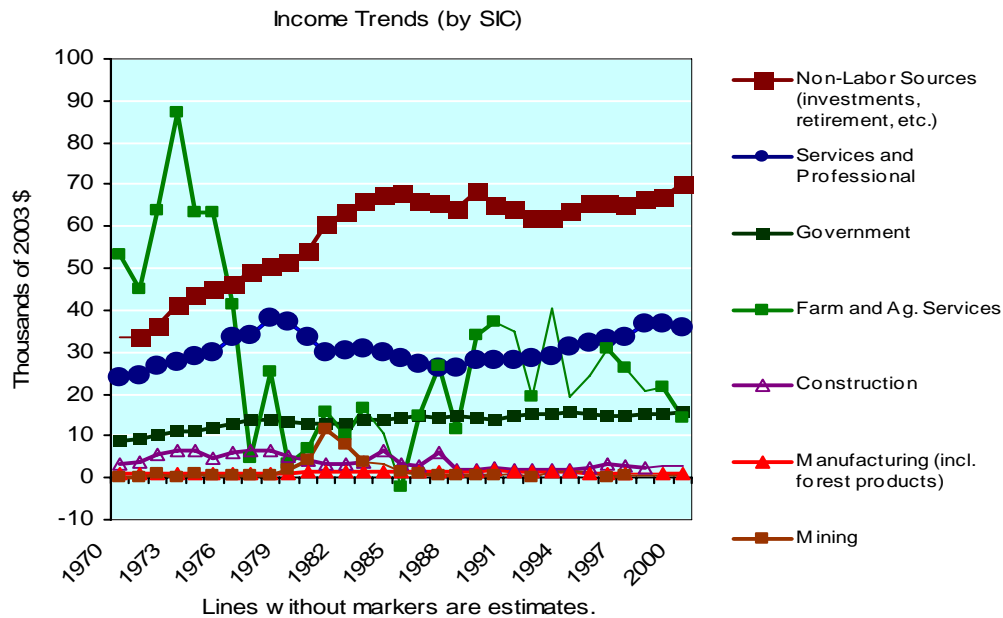
In Pondera County there are four threatened species, one of which has proposed critical habitat. These are the piping plover, bald eagle, Canada lynx and grizzly bear (*Charadrius melodus*, *Haliaeetus leucocephalus*, *Lynx Canadensis* and *Ursus arctos horribilis*). The Gray Wolf is also present in Pondera, which is the county's single listed endangered species. Both the gray wolf and the grizzly bear range into areas that are inhabited by humans, often in search of food. Wolf packs are territorial, so despite their wariness of people, they can be found in forested areas and other settings along the "urban – wildland" interface. The U.S. Fish and Wildlife Service and the State of Montana work with

ranchers in management of the wolf population. To reduce the risk of livestock being killed by wolves, the partners work to resolve conflicts through a combination of non-lethal deterrents and lethal control. In the last 17 years nearly 170 wolves have been killed in Montana, over half of the number killed in the tri-state area of Montana, Wyoming and Idaho.<sup>82</sup>

For bald eagles to be delisted, four conditions must be met. There must be a minimum of 800 nesting pairs and an average reproductive rate of 1 fledgling per pair. These goals must be met in 80% of the management zones and there must be stable or increasing winter populations.<sup>83</sup> In Montana, in 1995 there were 196 reproductive pairs.<sup>84</sup> Where the bald eagle needs space in forested areas for nesting, the piping plover primarily needs unvegetated beaches or islands, shorelines, wetlands and larger reservoirs or rivers. It is a water bird, eating small invertebrates, worms, beetles, mollusks and crustaceans. Piping plovers are migratory, and arrive in Montana in May, leaving again at the end of the summer. The greatest threat to piping plovers is high water – for this reason a flood or high water season is dangerous because they lose their habitat. Piping plover management, done by several agencies, includes various activities: moving nests above flood lines, releasing captive plovers to increase wild populations, and timing releases from dams to coordinate with natural seasonal flows. Other management activities are specific to human activity: reducing human and vehicular use of nesting areas, using signs to indicate nests, and doing public outreach.<sup>85</sup>

## TETON COUNTY

### Personal Income



From 1990 to 2000 Teton County lost \$3 million in personal income (by 2003 total personal income had increased slightly, to \$145 million). In 2000 Services and related industries represented almost a quarter of total personal income; another 50 percent came from non-labor sources.

New Income by Type						
All figures in millions of 2000 dollars	1990	% of Total	2000	% of Total	New Income 1990 to 2000	% of New Income
Total Personal Income*	147		144		-3	
Farm and Agricultural Services	37	25.4%	14	9.9%	-23	706%
Farm	35	24.1%	11	7.9%	-24	737%
Ag. Services	1.9	1.3%	2.9	2.0%	1	NA
Mining	0.5	0.3%	0.7	0.5%	0	NA
Manufacturing (incl. forest products)	2	1.2%	1	0.7%	-1	22%
Services and Professional	28	19.0%	36	24.9%	8	NA
Transportation & Public Utilities	8	5.4%	14	9.7%	6	NA
Wholesale Trade	6	4.1%	5	3.6%	-1	27%
Retail Trade	4	2.9%	4	3.0%	0	NA
Finance, Insurance & Real Estate	3	1.9%	4	2.5%	1	NA
Services (Health, Legal, Business, Oth.	7	4.7%	9	6.1%	2	NA
Construction	2	1.5%	3	1.9%	1	NA
Government	14	9.6%	15	10.8%	1	NA
Non-Labor Income	65	44.5%	70	49.1%	5	NA
Dividends, Interest & Rent	42	28.9%	44	30.5%	1	NA
Transfer Payments	23	15.6%	27	18.5%	4	NA

\*The sum of the above categories do not add to total due to adjustments made for place of residence and personal contributions for social insurance made by the U.S. Department of Commerce.

## Wages and Employment

Wages and Employment in 2003 (Private Sector Only)			
	Employment	% of Total	Average Annual Pay
Total, all industries	1,219	100%	23,170
Goods-Producing	115	9%	21,608
Natural Resources and Mining (Incl. Ag.)	57	5%	22,903
Construction	42	3%	22,238
Manufacturing	16	1%	15,486
Service-Providing	1,104	91%	23,333
Trade, Transportation, and Utilities	425	35%	24,581
Information	190	16%	34,500
Financial Activities	90	7%	28,846
Professional and Business Services	43	4%	27,455
Education and Health Services	190	16%	18,428
Leisure and Hospitality	128	11%	8,379
Other Services	33	3%	10,465

In Teton County the Service-Providing industries pay a higher wage than the Goods-Producing industries, largely due to the high employment and high relative wages in Information services, Financial Activities, Trade, Transportation and Utilities. The relative high wages in Services have been helped by several factors: the presence of 3Rivers Communications in Fairfield; a relative low-reliance on low-wage tourism-related industries (11% of total private employment compared to 33% in Glacier County); and the presence of railroads and grain elevators.

Key characteristics of Teton County:

An older population: The population has gotten older since 1990. The median age in 2000 was 40 years, up from 36.5 years in 1990.

More evenly distributed income: In 1999, for every household that made over \$100,000, there were 15.1 households that made under \$30K. Ten years earlier, for every household that made over \$100,000, there were 39.2 households that made under \$30,000.

Low per capita income: In 2003, per capita income in Teton County, Montana (\$22,735) was lower than the state (\$25,406) and the nation (\$31,472).

Employers are mostly small firms: In 2001, 95% of the firms had fewer than 20 employees.

### **Other Characteristics of Teton County (Health, Housing, Public Safety, Education and Schools, Environmental Issues):**

Teton County Health Department is located in the county seat of Choteau and runs various public health services. These include WIC, immunization services, tobacco programs and public health and safety education.<sup>86</sup> The Teton Medical Center, also located in Choteau is a 10-bed critical care hospital, with a 36-bed extended care capability. The Medical Center provides radiology, rehabilitation services, extended living, preventative health care and nursing home services as well.<sup>87</sup>

The Teton Nursing Home offers the following:<sup>88</sup>

1. Physical Therapy
2. Occupational Therapy
3. Alzheimer Care
4. Five Meal Plan
5. Respite Care
6. Nursing Rehabilitation
7. Short and Long Term Care
8. Adult Day Care
9. Speech Therapy

Although there are facilities for housing seniors and elder care, there appear to be no low-income housing efforts or programs in Teton County. There are approximately 2,900 housing units in Teton County as of 2002, of which 75 percent are owner occupied.<sup>89</sup>

There are 14 public schools in Teton County. They range in size from just over 20 students, at the Power 7<sup>th</sup> and 8<sup>th</sup> Grade School and the Dutton 7<sup>th</sup> and 8<sup>th</sup> Grade School, to nearly 200 students in the Choteau High School.<sup>90</sup> Teton County's Sheriff's Department is also housed in Choteau. The Sheriff's Department is responsible for the countywide enforcement of all laws and is also responsible for the service of criminal and civil warrants.<sup>91</sup>

As a visitor to Teton County, one would find a number of recreational activities. There are various hotels and inns, wildlife areas managed for hunting and bird watching, local parks and campgrounds, and a local Old Trail Museum. The Museum provides educational opportunities on the Montana Dinosaur Trail, which consists of a state-wide series of exhibits, field digs and educational programs.<sup>92</sup> Choteau promotes its hiking, wildlife watching, nature hikes and hunting access in to Rocky Mountain Front.<sup>93</sup> In 1947, local elected officials consolidated the entire County, all 1,468,160 acres, into the Teton County Conservation District. The Conservation District provides programs in erosion control, water conservation, soil fertility management and proper land use. In addition, the District has memoranda of understanding signed with the Natural Resources Conservation Service (NRCS) and Extension Service to provide assistance in carrying out sound soil and water conservation programs.<sup>94</sup>

Teton County has two abandoned mine sites, both of which drain into the Teton River watershed. There are four Montana DEQ Remediation Response sites, including agricultural run-off and improper permitting. There are 33 miles of crude oil pipeline in the county, belonging to one company. There are no open landfills, but a closed one in each of the towns of Choteau, Dutton and Fairfield. The USFWS and NRCS manage 9,486 acres of conservation easements in the county, and there are 32,084 acres under private management. Also in Teton County are congressionally designated Wilderness areas, Bureau of Land Management Special Designation areas, and Research Natural Areas, all of which are in federal ownership. The Wilderness areas constitute eight percent of the Teton County area, or 117, 641 acres. The BLM Special Designation areas, which may be Areas of Critical Environmental Concern, Outstanding Natural Areas, or Primitive Areas and Wild Horse Ranges, make

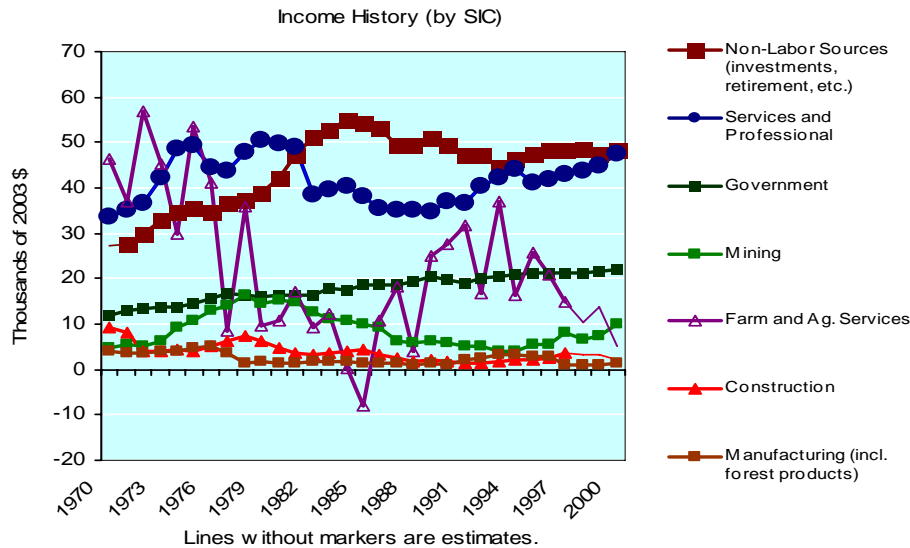
up 0.9 percent of Teton County area, or just over 13,000 acres. There are 1,791 acres designated as Research Natural Areas.

In Teton County there are three threatened species, and one endangered – the same species that one finds north and south along the Rocky Mountain Front. The bald eagle, grizzly bear and Canada lynx all live in Teton County. The gray wolf also has territory within Teton County.<sup>95</sup>



## TOOLE COUNTY

### Personal Income



From 1990 to 2000 Toole County lost \$9 million in personal income, more than any other county in the Sweetgrass region (total personal income declined even further to \$117 by 2003). Toole County is also the only one of the five counties to experience a decline (over \$1 million) in non-labor income sources during that time. While Agriculture has declined the fastest, Services, Government, and Mining (primarily oil and gas) sectors have added personal income to the economy.<sup>96</sup>

New Income by Type						
All figures in millions of 2000 dollars	1990	% of Total	2000	% of Total	New Income 1990 to 2000	% of New Income
Total Personal Income*	128		120		-9	
Farm and Agricultural Services	27	21.4%	5	4.4%	-22	260%
Farm	27	21.0%	5	4.2%	-22	256%
Ag. Services	0.5	0.4%	0.2	0.2%	0	3%
Mining	5.9	4.6%	9.9	8.2%	4	NA
Manufacturing (incl. forest products)	1	0.8%	1	1.0%	0	NA
Services and Professional	37	28.7%	48	39.7%	11	NA
Transportation & Public Utilities	17	12.9%	20	16.3%	3	NA
Wholesale Trade	4	2.7%	4	3.4%	1	NA
Retail Trade	6	4.9%	6	5.2%	0	2%
Finance, Insurance & Real Estate	3	2.1%	3	2.7%	1	NA
Services (Health, Legal, Business, Oth.	8	6.0%	15	12.2%	7	NA
Construction	2	1.3%	2	1.9%	1	NA
Government	20	15.3%	22	18.3%	2	NA
Non-Labor Income	49	38.3%	48	40.2%	-1	12%
Dividends, Interest & Rent	32	24.6%	28	23.2%	-4	44%
Transfer Payments	18	13.8%	20	17.0%	3	NA

\*The sum of the above categories do not add to total due to adjustments made for place of residence and personal contributions for social insurance made by the U.S. Department of Commerce.

## Wages and Employment

<b>Wages and Employment in 2003</b> <b>(Private Sector Only)</b>			
	Employment	% of Total	Average Annual Pay
Total, all industries	1,357	100%	23,522
Goods-Producing	191	14%	28,926
Natural Resources and Mining (Incl. Ag.)	116	9%	30,270
Construction	47	3%	27,661
Manufacturing	28	2%	25,485
Service-Providing	1,166	86%	22,638
Trade, Transportation, and Utilities	524	39%	26,002
Information	42	3%	23,314
Financial Activities	69	5%	29,099
Professional and Business Services	182	13%	21,961
Education and Health Services	81	6%	25,299
Leisure and Hospitality	241	18%	14,096
Other Services	27	2%	12,558

In Toole County the highest wages are in Natural Resources and Mining, which represent 9 percent of the total workforce. Other relatively high wage sectors are in Construction, Trade, Transportation and Utilities. Eighteen percent of the private workforce is employed in the relatively low-wage tourism-related sector: Leisure and Hospitality.

Key characteristics of Toole County:

An aging population: The population has gotten older since 1990. The median age in 2000 was 39.1 years, up from 35.4 years in 1990.

More evenly distributed income: In 1999, for every household that made over \$100K, there were 14.8 households that made under \$30K. Ten years earlier, for every household that made over \$100K, there were 50.3 households that made under \$30K.

Low per capita income: In 2003, per capita income in Toole County, Montana (\$22,853) was lower than the state (\$25,406) and the nation (\$31,472).

Predominantly small firms: In 2001, 92% of the firms had fewer than 20 employees.

### **Other Characteristics of Toole County (Health, Housing, Public Safety, Education and Schools, Environmental Issues):**

In Shelby, the Marias Medical Center provides primary, long-term, assisted living and select care services to residents throughout the county. The Center combines a 20-bed hospital with a 68-bed nursing facility that provides rehabilitation and restorative care. In addition to radiology, surgery and acute care, the Center also provides a Home Health service to patients of all ages in their own homes.<sup>97</sup>

There were approximately 2,295 housing units in Toole County in 2002. Just over 70 percent of these were owner occupied.<sup>98</sup>

There are 12 public schools in Toole County. Most of these schools are in the towns of Sunburst and Shelby. There are 10 students in the Galata Elementary School, 113 students in Sunburst Elementary School, 20 students in the Hillside Hutterite Colony School, and 200 in Shelby High School.<sup>99</sup>

The Shelby Chamber of Commerce is active in promoting the region's natural amenities and tourist activities. Among these are boating and fishing around Lake Elwell and the Marias River, golf at the Marias Valley Golf and Country Club, and hiking through the area's natural sandstone formations at 'Little Jerusalem'.<sup>100</sup> Shelby is also home to the Marias Museum of History and Art, which has collections including artifacts from Native American culture, gold mining, homesteading and agriculture. Shelby houses a community recreation center, which is outfitted for indoor recreation: a kid's game room, a work-out room, gym classes and a public swimming pool.<sup>101</sup> The 1923 World Heavyweight Boxing Championship fight also took place in Shelby.

Shelby was selected to receive a 2005 brownfields cleanup grant. Provided with funding from the Environmental Protection Agency, Shelby is working to clean up asbestos and lead-based paint contamination at three abandoned schools. Once these sites are cleaned up, they will be used for a variety of community services, including an educational center, a Head Start Program, alternative secondary education classrooms, adult education programs, and a satellite-learning program.<sup>102</sup>

Toole County is home to the threatened bald eagle and the endangered black-footed ferret (or *Mustela nigripes*). This small weasel is the rarest mammal in North America, with a captive population of nearly 300 and small wild populations that are reestablished. At this point, none of the three reintroduced ferret populations, one in Montana, is well established and the genetic viability of the captive population is at risk. Black-footed ferrets are closely tied to prairie dog populations; living within prairie dog tunnels, preying on them, and limited to the same habitat. Only large prairie dog populations, established over thousands of acres, can support black-footed ferrets. Although management agencies try to find new ferret populations, the problem is that less than eight percent of North America's historic prairie dog acreage remains.<sup>103</sup>

Toole County has eight abandoned mines sites, five of which are now used for recreation purposes. There are also 11 Department of Environmental Quality Remediation Response sites in Toole, five of which are located in Shelby. Eight of these sites are related to oils spills, oil refineries, or petroleum processing. 9,251 acres of Toole County are currently under a federal Fish and Wildlife Service conservation easement. There is also one open landfill in the county and seven closed landfills and 71 miles of crude oil pipelines in the county.<sup>104</sup>

### **Other Environmental Characteristics of the Sweetgrass Development Region:**

The following section outlines specific environmental characteristics that are not covered in the county-by-county analysis above. The Sweetgrass Development Region has a number of significant designated and protected areas and is relatively free of non-compliance with state and federal environmental regulations.

The Sweetgrass Development Region falls into two state watershed areas, the Upper and Lower Missouri watersheds. The Missouri River, stretches of which are nationally designated as a Wild and Scenic River, runs through this area.<sup>105</sup> There are nearly 230 miles of the Missouri within Cascade County, on which many of the state parks and recreation areas are situated. The major rivers and shorelines in the Sweetgrass region are listed below, although none of them are designated Wild and Scenic Rivers.<sup>106</sup>

<b>COUNTY</b>	<b>RIVER/ShORELINE</b>	<b>MILES WITHIN COUNTY</b>
Cascade	Missouri River	230 miles
	Belt Creek	85 miles
	Smith River	62 miles
	Sun River	62 miles
Teton	Teton River	108 miles
	Muddy Creek	95 miles
Pondera	Pondera Coulee	68 miles
	Birch Creek	60 miles
Glacier	Cut Bank Creek	144 miles
	Milk River	87 miles
	Two Medicine	65 miles
Toole	Marias River	98 miles
	Lake Elwell (Tiber Reservoir)	77 miles
	Willow Creek	77 miles

According to the Montana USGS Water Information Center, approximately 10 of the streamflow gaging stations operated by USGS and the Bureau of Indian Affairs and Tribal entities within Montana are scheduled to be discontinued in the spring of 2006 due to reductions in funding from the BIA and the Tribes. Also of note is that in 2005, the Marias River had below normal flows.<sup>107</sup>

According to the Environmental Protection Agency's AirData public website, there are no non-attainment areas for any particular pollutants within the Sweetgrass Region.<sup>108</sup>

## Summary of Strengths and Weaknesses Arising from Economic Analysis

	STRENGTHS	WEAKNESSES
Sweetgrass Region Compared to the Nation		
	Higher education rate	Slower growth in population, employment and personal income
	Higher average earnings per job	A higher ratio of rich to poor (income is less evenly distributed; but getting better)
	Higher per capita income	A higher dependence on personal income from government employment (see NOTE below)
	Economically more diverse	Loss of young adults who are leaving region
	More affordable housing	
	Lower unemployment rate	
	Higher dependence on government employment (see NOTE below)	
Sweetgrass Region Compared to the State		
	Also a low unemployment rate	Slower growth in population, employment and income
	Economically more diverse	Lower education rate
	More affordable housing	Higher dependence on government jobs
	Higher per capita income	
	Higher average earnings per job	
	Higher dependence on government jobs	
Regional Transportation		
	Interstate 15, Highways 2, 89, 287	Relative geographic isolation
	Presence of a metropolitan area (Great Falls) with a commercial airport	Two counties have difficulty accessing the Great Falls airport due to distance
	Attraction of knowledge industry workers more likely for Cascade and Teton counties	Attraction of knowledge industry workers less likely for Glacier, Pondera and Toole counties
	Trade opportunities with Canada	Mountainous terrain make east-west travel difficult, especially in winter
	East-West, North-South rail corridors	

NOTE: Dependence on government for jobs and income can be a benefit and a liability. In some counties government jobs pay relatively well, and provide important benefits like health care. Often government and military jobs add stability to the economy. Yet dependence on government can also be a weakness. In places like Cascade County with high dependence on a military base, the economy is in a precarious position because the decisions to keep the base open, close it, or change its size or mission are primarily made at the federal level. In some places, like Glacier County, a high dependence on government employment is a sign of a relatively weak private sector.

	STRENGTHS	WEAKNESSES
Cascade County		
	Most economic growth in the private sector: services and professional and non-labor income sources represent 99% of net income growth in last three decades	12% of total personal income is from military employment (Malmstrom Air Force Base)
	Continued growth of real personal income 1970-2003	Great Falls has lower wages than comparable urban areas
	Many “service” industries are high-wage	Loss of young adults who are leaving county
	A diversity of high-wage jobs exists in both goods-producing and service-providing sectors	
	A large and growing health care center	
	Airport with daily commercial service to major hubs and metropolitan areas	
Glacier County		
	Rapid and sustained <i>growth</i> in population, employment, personal income and earnings per job	The lowest average wages in the region; rapid growth of earnings per job primarily due to growth in government employment.
	Gateway to Glacier National Park: opportunities for tourism	Highest unemployment rate in the region
	High growth in government employment (without these jobs, the economic situation in the county would be severely depressed)	A disparity in income, formal education levels, poverty levels, per capita income, earnings per job, etc. between Native American and non-Native populations
	Blackfeet culture and sense of identity	Older population with more teenagers to support; on Reservation more children than adults
		Agricultural income is erratic and declining
		Wages suppressed by over-dependence on tourism (33% of employment is in low-wage Leisure and Hospitality)
		Over 100% of net growth in last three decades from government and non-labor sources; relatively low growth in private sector
		Most frequent annual household income bracket is less than \$10,000
Pondera County		
	Personal income growth in late 1990s and early 2000s	Long-tem decline in total personal income (1970 to 2000)
	High-wage goods-producing jobs exist, especially in construction (18% of workforce)	Declining income in service-related industries
	Proximity to Rocky Mountain Front	Agricultural income is erratic and declining
		Service sectors are over-dependent on relatively low-wage Leisure and Hospitality
		Almost as many teenagers as adults

	STRENGTHS	WEAKNESSES
Teton County		
	Personal income growth in late 1990s and early 2000s	Long-term decline in total personal income (1970 to 2000)
	Most of the county's population lives within an hour's drive of the Great Falls airport (untapped potential)	Low average earnings per job
	3 Rivers Communications – a high-tech employer	Most of the growth in non-labor sources; relatively slow growth in services
	Large health care sector (16% of workforce)	Low per capita income
	High-wage service industries (higher than goods-producing)	11% of private industry workforce in relatively low-wage tourism sectors
	Proximity to Rocky Mountain Front	Loss of young adults who are leaving county
Toole County		
	Personal income growth in late 1990s and early 2000s	Long-term decline in total personal income (1970 to 2000)
	An increase in "mining" (oil and gas) in the 1990s	Decline in non-labor income (1970 to 2000)
	High-wage goods-producing jobs exist (14% of workforce)	Income from agriculture is erratic and declining
		18% of private industry workforce in relatively low-wage tourism sectors
		Loss of young adults who are leaving county
Characteristics Common to all Five Counties		
<p><u>Other sectors grow while agriculture declines</u>: this is evidence that much of economy has moved away from agriculture. While the decline of any industry is lamentable, adaptability and reliance in other sectors is a good sign.</p> <p><u>Little cross-county commuting</u>: this is an untapped opportunity, which leads to a need for regional transportation system (e.g. public transportation to get workers looking for jobs and people seeking health care in and out of Great Falls).</p> <p><u>Much of the growth is recent</u>: from the mid-1990s to 2003, per capita income, total personal income and average earnings per job have increased; reversing the trend from the previous decades.</p> <p><u>Aging population</u>: in all counties the population is getting older and there is a substantial growth in non-labor income, which includes investment and retirement income.</p> <p><u>Higher education rate</u>: compared to Montana and the nation, more people in the Sweetgrass region have a college degree; a necessary condition to compete economically.</p> <p><u>Small firms</u>: most employment is in firms of fewer than 20 employees, in a wide variety of sectors. This diversity is good for the ability of the region to adapt to change. It also means less reliance on any one sector.</p> <p><u>Income more evenly distributed than in the past</u>: while poverty still exists, over time the gap between rich and poor has narrowed, and a bigger middle class existed in 2000 compared to 1990.</p>		



## COMMUNITY PARTICIPATION IN THE CEDS PROCESS

The first step in the development of this CEDS document was to ensure thorough and regular participation from a wide range of citizens and community leaders. This was accomplished as follows:

1. A series of in-depth listening sessions (focus groups) or interviews with community leaders in each of the five counties of the North Central Montana Economic Development District:

August 30, 2005 - Conrad, Montana (Pondera County), focus group with participation from city government, county commissioners, state representatives and local elected officials of Conrad, Valier, and rural farming areas of the county.

August 31, 2005 – Choteau, Montana (Teton County), focus group with participation from county and city government, local businesses and community leaders from Choteau, Fairfield, and Dutton.

September 21, 2005 – Shelby, Montana (Toole County), focus group with participation from local businesses leaders, city government, local economic development organizations, and community leaders from Shelby.

September 20 and October 12, 2005 – In depth interviews conducted in Great Falls, Montana (Cascade County), with local and city government, community planning and development officials and local business owners of Great Falls, and Hilier.

October 12, 2005 – Cut Bank, Montana (Glacier County), focus group with participation from citizens of Cut Bank and Browning, including city and state government, local business and economic development organizations, and community volunteers.

October 13, 2005 – Browning, Montana (Glacier County), focus group with participation from residents of the Blackfeet Nation tribal government, local development organizations, county government, and tribal businesses, such as the community college and hospital.

2. Review of ongoing community development efforts, via in-person interviews and review of development documents, land-use plans, capital improvement plans, and transportation plans.
3. Circulation of drafts of the CEDS document to community leaders via the Executive Director of the North Central Montana Economic Development District.
4. Incorporation of comments and suggestions into the final draft.

## **FOCUS GROUPS (LISTENING SESSIONS)**

### **Overview**

The focus groups, or listening sessions, which were held in each county within the Sweetgrass region, provided the opportunity to verify and gain local knowledge about the economic and social realities of the area. Each focus group yielded a wealth of information about community efforts at economic development; opportunities and obstacles to creating a diverse and stable economy with high-wage, high-skill occupations; and the importance of quality of life issues, such as a clean environment, transportation, and crime rates.

Five focus groups, and a series of in-depth interviews in Great Falls, were completed between September and October 2005. The sessions were designed to gather information, opinions, and perspectives from local leaders that could form the basis of a vision for economic success in the region. At each session, participants were given an overview of the Comprehensive Economic Development Strategy process and their local economy and were asked to discuss:

1. Local values,
2. Current challenges, and
3. Future opportunities.

This report summarizes the main discussion themes and general outcome of each session. It is important to note that each summary comes directly from notes taken during the sessions, and is meant only to reiterate what was discussed. In Great Falls, a focus group that involved many of the community leaders generating data together was impossible to convene. Instead, in-depth interviews were conducted with key local leaders.

### **Focus Group Design**

Each focus group began with a review of the CEDS document process and a discussion of the ‘desired future’ for the geographic location. The attendees were presented with information developed by the Sonoran Institute, generated by the Economic Profile System<sup>109</sup> and were asked to review it. The focus group participants were asked to concentrate on identifying existing challenges to economic success, community achievement and long term viability of the area. Each group of participants was also asked to address the potential for success in the region; the identification of existing models and economic objectives for the region. The sessions ended with an explanation of how the local information gathered would be used in the CEDS document.

#### **In-Depth Interviews - Great Falls, Cascade County September 20 and October 12, 2005**

The focus group in Great Falls was not successful in pulling together members of the community, so instead Sonoran Institute staff interviewed key leaders in and around Great Falls (the mayor, a financial consultant, and members of the planning and economic development departments).

Great Falls community leaders recognized that the urban center leads the region economically. Most were of the opinion that successes in Great Falls would contribute to opportunities in surrounding towns and counties. Great Falls has been actively involved in partnerships with other cities in Montana and with government networks in the area.

There were a variety of bold ideas expressed about how to address Great Falls' weaknesses and take the city and region toward an agreed upon future. These include increasing Malmstrom's capabilities to accommodate NASA needs, diversifying regional agriculture through value-added activities, developing resources to support investment packages for relocating or growing companies, expanding health services and technical medical expertise, providing advanced educational opportunities for young adults to help keep them in the region and allow them to compete for higher-wage jobs, joint city-county-airport planning, and development of alternative energy sources.

In the following table, in-depth interview information from Great Falls is summarized:

<b>Great Falls</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic</b>	Develop a stable and diverse economy	<ul style="list-style-type: none"> <li>-MT is the least marketed state in the nation</li> <li>-No introduction to the corporate world</li> <li>-Hard to maintain the region's medical facilities</li> </ul>	<ul style="list-style-type: none"> <li>-Put together investment packages</li> <li>-Specialize workforce to bring higher wages</li> </ul>
	Expand value added agriculture	Agriculture as an industry is declining, but the area around Great Falls has a historic and social stake in agriculture	<ul style="list-style-type: none"> <li>-Diversify the types of agriculture done, and support the communities through long term commitment</li> <li>-Provide public education that development of Great Falls will not detract from rural economies</li> </ul>
	Find competitive advantage for Great Falls as a business opportunity	Economic competition with the whole world	-Emphasis on proximity to national parks and public lands
	Expand Air Force Base (Malmstrom AFB) capabilities	Malmstrom competes with other major national AFBs for expansion	<ul style="list-style-type: none"> <li>-Add a refueling wing and a division to retrofit ICB missiles</li> <li>-Add a long term contract to work with the space shuttle components</li> <li>-Bring in NASA research facility</li> </ul>
	Maintain a highly educated workforce	Lack of a graduate program at University	<ul style="list-style-type: none"> <li>-Bring in specialized physicians and technicians</li> <li>-Support and strengthen Great Fall's NIH research facility</li> </ul>
<b>Infrastructure</b>	Develop a diverse portfolio of energy generation	Lack of a investment to move forward with projects	<ul style="list-style-type: none"> <li>-Emphasize on alternative energy development (ethanol, synfuels and hydrogen)</li> <li>-Use energy diversification as an attractant for business</li> <li>-Potential power plant which would provide hydrogen for space shuttle project</li> </ul>

<b>Great Falls</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
	Develop a city-wide transportation plan and airport		-Complete the transportation plan for hospital district  -Upgrade to Category 3 runway  -Bring in flight service and develop a 'destination' airport for tourism flights
<b>Social and Community</b>	Maintain good working relationships between the city, county and the airport		Assistance in development plans and transportation futures
	Expand model neighborhood housing projects		
	Create competitive wages for young people	Out migration of young people due to lack of competitive wages	

### **Workshop - *Browning, Glacier County* October 13, 2005**

This workshop included 9 participants, including representatives from the Blackfeet Community College, the Blackfeet Community Development Council, the Blackfeet Community Hospital, the Blackfeet Women's Business Center, and the Tribal Economic Resource Council (TERO). Also attending were a tribal Planning representative, and a county commissioner. Two Sonoran Institute staff facilitated this focus group (Ben Alexander and Sarah Waring). Kelley Shepp, the Executive Director of Sweetgrass Development, also attended.

At the Browning workshop the discussion was framed by issues the Blackfeet nation confronts as a tribe, sovereign nation, and historically marginalized entity. The relationship between quality of life, economic development, historical events and present day racism is complex. The Blackfeet face a variety of economic challenges: high levels of unemployment, low per capita income, and restricted procedures for loans and trust lands - all of which contribute to a lack of business investment in the area. There are also tribal issues such as historical grief, culturally specific notions of success, tribal governance, and data/resource sharing problems, which have become obstacles to realizing economic development. Then there are problems that Browning and the Reservation, share with other rural parts of northern Montana such as rampant drug use and an untrained workforce.

These problems notwithstanding, the Browning workshop was a very positive and collaborative effort – success stories were related, and action items were identified for further work. Members of the Blackfeet tribe have done significant work both under the auspices of tribal government and independently to bring about community success. The workshop participants agreed that using local examples of economic and community success to celebrate and build upon was imperative. They also agreed that workforce education and training is important, that a community-accepted (and hosted) resource for information/data is critical, and that using the Blackfeet culture as the overarching

framework for development would be key to success. Safe and adequate housing and healthcare were also mentioned as priorities.

In the following table, the discussion from the Browning focus group is summarized:

<b>Browning</b>	<b><i>Vision of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic</b>	Lower poverty levels	-High debts for education	-Education for native children on the reservation  - Grant Writing workshops so that there is more capacity within the community to do
	Lower unemployment rates	-Very few jobs in the reservation  -Low levels of expertise and availability of training but a large labor force	-Creation of job training programs  -Creating business packages to attract firms  -Training for customer service  -Getting accurate numbers for Census
	Develop conditions for thriving business community	-Indians are and have been turned down by banks, being 'redlined'  -No financing for incoming projects  -No capital in local community to invest  -One bank in town, not trained to handle native equity and finance management  -Tribal government is restrictive to economic growth due to its changeable nature and structure	-Basic skill building workshops  -Attracting a bank that will loan, and is locally owned and is familiar with Trust Lands  - Use available monies wisely so that people can have the opportunities to build new companies  -Explore the option of free commerce between Indian nations, following Mohawk tribe example; learning from other tribes.
	Train tribal government in money management and finance		- Provide tribal members and officials with training courses on business practices and financial management
<b>Infrastructure</b>	Upgrade infrastructure , consistent throughout reservation towns	-Lack of a Capital Improvements plan with high level of local buy-in  -Labor force issues	

<b>Browning</b>	<b><i>Vision of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Infrastructure (continued)</b>	Provide sufficient housing for community	50% of existing housing is substandard, and most families do not have resources to help themselves	-Partnership with local industries and working through government programs to improve/increase existing housing
	Control water resources on reservation		-Headwaters of Cut Bank creek are on the reservation, and this provides an opportunity for the tribe, especially in the region to deal with other cities and towns and counties
	Upgrade the communications infrastructure for towns: DSL and telephone lines	-Lack of funding and qualified workforce	- Provide low cost access in public spaces to high speed internet and break down technology barrier
	Establish a mutually respected central information/data collection system, available to all organizations	-Different groups are protective of their data collection  -Inaccurate reporting to Census means that we are not receiving our full benefits and operating at a lower capability.  - Natural reaction to government research is negative because of history of exploitation and misrepresentation  -Duplication of grants	-Centralize information into a bank/repository (perhaps the college) so that all people have access to it  -Organize local members of groups to do data collection would allow for a trust that outside groups do not have (as has happened with the labor force survey, conducted by Tribal Revenue Department rather than BIA).  -Create a Task Force to provide data to different tribal groups, like Blackfeet Planning so that they can write grants with accurate info.
	Use the natural resources, such as wind, to bring projects to the reservation	- Production tax and tribal government complications prevented project success	-Potential to tie into the Southern Canadian grid and providing power to Alberta
<b>Social and Community</b>	Develop economic development plans which use Blackfeet culture as guiding principle		-Establishment of a PRIORITIES LIST for community, which would lead to action oriented decisions
	Establish lending institutions and non-native schools that are free of racism and prejudice		-Education for tribal leaders and for financial institution on alternative lending opportunities and equity resources

<b>Browning</b>	<b><i>Vision of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Social and Community (continued)</b>	Provide sufficient health care that is affordable to handle drug abuse, poor nutrition and teen health	-High rates of alcoholism and drug addiction	-Adequate health care services and follow up services
	Create tribal government and politics that are separate from tribal entrepreneurship		-Groups within the community should be working together; like BCDC, TERO, and tribal govt.

**Workshop – Cut Bank, Glacier County  
October 12, 2005**

This workshop included 8 participants, including representatives from the local government, the local bank, economic development organization and health center. There were also citizens present who were active volunteers in the community, retired county commissioners, and a state legislator. Two Sonoran Institute staff facilitated this focus group (Ben Alexander and Sarah Waring) and Kelley Shepp, the executive director of Sweetgrass Development, also attended.

Cut Bank is unique in that it shares a county with a large reservation. Much of the community discussion was focused on finding better ways to work with and share economic success across the county. Cut Bank workshop participants identified their economic development obstacles as being a lack of workforce education and skills, an outflow of young people to better jobs and more attractive communities, a lack of housing and municipal infrastructure to attract new residents, and few successful partnerships with the Reservation. The solutions discussed include job skills training, development of partnerships with Blackfeet tribe, enhancement of tourism, especially related to Glacier National Park, beef processing plant and value-added agriculture, celebration of business successes (e.g., retail) and establishment of business networks.

In the following table, the discussion from the Cut Bank focus group is summarized:

<b>Cut Bank</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic</b>	Expand value-added agriculture in the area	Skill base needs to be developed	-Processing of local beef and the promotion of local and regional cattle industry would be advantageous
	Increase visibility for area in tourism and business	Lack of a major highway running through Cut Bank and therefore a loss of the trucking industry	-Bring stewardship back into the jobs that do exist  -Good proximity to Glacier National Park and ability to work with Browning to establish gateway community  -Use existing successful models to train businesses

<b>Cut Bank</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic (continued)</b>	Provide business opportunities for small businesses to return to Cut Bank	Labor shortage in Cut Bank  Transportation costs for businesses moving into Cut Bank, both from trucking and railroad ends	-Enhance what small businesses already do; Syntex, Continental Oil Company – and explore opportunities for expansion
	Create competitive jobs	Outflow of people to better paying jobs	-Create a local or regional network of successful businesses and celebrate the examples  -Develop investment packages for businesses
	Diversify of the businesses and industry base	Retail jobs are not sustaining and many people are working 2 or 3 jobs to make a living wage	-Retail center for the area, lots of shoppers coming in from Shelby and Browning
<b>Infrastructure</b>	Maintain of hospital in Cut Bank	Hospital is only viable year to year, but it not assured long term	
	Keep good health care providers	Other health care providers in Great Falls with better benefits	
	Build a new nursing home for retirees	Nursing home was through a bond issue	
	Replace of old infrastructure and fire hydrants	Cut Bank pays for upgrades through the fee system, not through bonds	
	Provide training and high standard of living for young people	-Jobs for young people are scarce: oil fields are played out and no longer employ large numbers	-Develop local and regional training centers -Increase private investment in good business practices
	Fill existing housing and supply for housing need		-Establish Community housing program
	Maintain a steady population increase	-Lack of incentive for new residents to move here	
<b>Social and Community</b>	Eliminate racism in schools	Very hard to manage racism related problems	-Work to celebrate successes in community -Provide public education in community about native and non-native cooperation
	Eliminate schism between towns in the county	Territoriality and misconceptions over tax base, tribal government.  Division between government and business investments	-Use models of existing success stories to expand a network into the county
	Bring a higher portion of young people into community	-No high wage jobs -No training that can keep them here -No amenities that appeal to them	-Use cooperation regionally to expand training programs -Make Cut Bank an attractive place to live



<b>Cut Bank</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Social and Community (continued)</b>	Eliminate the Methamphetamine problem in the community (4 meth labs discovered in Cut Bank in the last year)	<ul style="list-style-type: none"> <li>-There is not enough law enforcement</li> <li>-The problem adds to poorly educated workforce</li> <li>-Businesses won't invest because of it</li> </ul>	-Need support for children in the form of year-round activities and programs that will educate against drug addiction

**Workshop – Conrad, Pondera County**  
**August 30, 2005**

This workshop included 13 participants, with representation from county government, county health care, Port Authority, community economic development organizations and the Chamber of Commerce. Three Sonoran Institute staff facilitated (Ben Alexander, Ray Rasker and Nina Chambers), and Kelley Shepp of Sweetgrass Development was also in attendance.

Conrad participants agreed that while agriculture used to be a primary way of life for residents, they need assistance adjusting their economic activities to a changing environment. They identified a need for local and regional technical assistance in building business networks and partnerships. They agreed on the importance of supporting value-added agriculture, new energy technology development, natural resource-based and heritage tourism, and financial resources for business startups and expansion. Workshop participants were clear that public works funding for municipal and transportation infrastructure will be beneficial to the area's quality of life and attractiveness for new businesses. Continued support for health care and assisted living facilities will also be important to retain an aging population.

In the following table, the discussion from the Conrad focus group is summarized:

<b>Conrad</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic</b>	Develop a strong and diverse economic base, emphasizing expansion of value-added agriculture	Lack of knowledge about how to attract new businesses that are community friendly	<ul style="list-style-type: none"> <li>-Need local technical assistance to train resident business owners to expand and support each other</li> <li>-Adopt area-wide "business friendly" processes; regulations, procedures and climate are difficult for new investors to understand</li> <li>-Need help for new businesses: revolving loan funds, gap financing, local advice and encouragement, tax incentives, etc</li> </ul>
	Develop area niche market to compete with larger regional and world markets	Larger communities can offer retail, 24 hour service, and other amenities, which Conrad cannot	<ul style="list-style-type: none"> <li>-Need to add value-added products and plan for the long term economic stability (baking, malting, etc)</li> <li>-Need to capitalize on existing resources that will bring in business</li> </ul>

<b>Conrad</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic (continued)</b>	Become a region with green power generation and technology industries	Lack of educated workforce, training and knowledge to begin the project	<p>-Major investment potential in new technologies is available, but the research needs to be available to establish them</p> <p>-Establishment of new businesses still needs to be community friendly</p> <p>-Need to find a way to support <b>new</b> business that doesn't fit established models</p>
	Preserve the high quality of life, community friendly business atmosphere and the natural amenities	Need to ensure that people are actively involved with management of natural resources, health care, local events, etc	<p>-Need to maintain high quality of life through partnerships and resource sharing</p> <p>-Need to strengthen the spirit of cooperation that exists with businesses</p> <p>-Maintain and strengthen patronage to local businesses</p>
	Add tourism to the local economy		<p>-Need better marketing for local heritage and Rocky Mountain Front offerings</p> <p>-Need additional infrastructure extensions to accommodate tourism</p>
<b>Infrastructure</b>	Update the existing infrastructure: sewer, water, roads, sidewalks, trees, etc	Funding for updates is competitive and difficult to get	-Utilize public works money to update infrastructure
	Fill existing housing		-Housing plan in place but population growth is needed
	Provide basic health services locally and attract residents due to services		-Strategic health plan in place but it needs support, especially with aging population bringing non-labor income
	Create an industrial park for businesses to locate		

<b>Conrad</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Social and Community</b>	Develop services and social capital to support new economic ventures	Citizens are not completely on board with changes to economy and community	-Need to take pride in changes: successful sports teams, welcoming new residents, and outreach to tourists
	Collaborate community wide for mutually beneficial and successful goals		-Need to strengthen our methods of sharing information and resources; need to get residents past the misinformation stage
	Build up the locally supported amenities	-Family owned pool in Valier is getting old  -Retirees moving in do not have services they need  - Not enough activities for youth year-round	-Need to find a way to strengthen community involvement and quality of life without losing it in economic development  -Need support to strengthen local medical services, assisted living facilities, providing services for retirees and youth
	Sustain the hospital with well trained and educated staff	Hospital will fail if it does not have a good CEO and business practices	

**Workshop – Choteau, Teton County**  
**August 31, 2005**

This workshop included 19 participants, with representation from local businesses, economic development corporations, local banks, the Chamber of Commerce, county commission and the mayors of Choteau, Fairfield and Dutton. Three Sonoran Institute staff facilitated (Ben Alexander, Ray Rasker and Nina Chambers), and Kelley Shepp of Sweetgrass was also in attendance.

Choteau participants focused much of the workshop discussion on area strengths: natural amenities and beauty, rural character, a strong sense of community, and a diversity of wildlife and tourism options. There was interest in developing value-added agricultural markets, defining an economic niche that complements Great Falls, cultivating resident support for local business, land use planning to protect natural amenities, partnerships with USFS, Museum of the Rockies and others to create centers of learning and high value visitation opportunities, capitalizing on the area's high speed internet infrastructure to support remote businesses, and competing for high wage businesses based on community character and regional quality of life.

In the following table, the discussion from the Choteau focus group is summarized:

<b>Choteau</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic</b>	Diversify economy and supplement farm and ranch income	Shallow labor pool for diversification	-Expand value added agricultural products and utilize existing resources and skills
	Bring business plans brought all the way to fruition	Lack of investment capital and equity	-Residents need to support local businesses, especially those that are good for the community  -Businesses need to broaden their markets and find technical assistance; improve their marketing
	Simplify the permitting process for small businesses	Lack of experience to get the loan or assistance to try new investment	-Outreach and education to potential businesses about what policies and guidelines exist  -Need to work in partnership with federal agencies to obtain guide permits
	Bring down overhead for small businesses	Health insurance is the most expensive for small businesses to cover	
	Create higher wages for residents	Difficulty attracting new residents because wages can't compete, and there are not jobs for spouses	-Use examples of successful local businesses to encourage new growth: Sun River Electric Cooperative, 3Rivers Communications
	Complete comprehensive planning for development that brings community vitality and preservation of natural resources		-Long term planning in partnership with surrounding towns and local organizations to implement strategies  -Work closely with existing resources in the area to build competitive advantage in a world market
	Develop of tourism as an economic strength	Very little local promotion of tourism	-Need better exposure and promotion of local attractions and natural resources
	Develop a system of information exchange with local communities		-Expertise needed to help each community benefit from development and exchange information effectively

<b>Choteau</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Infrastructure</b>	Transportation: need to maintain rail spur and opportunities for truckers		-Buy Rail spur to help present a good potential for business
	Develop advanced land use planning	Sprawling development does not respect environmental regulations, good practices, and community character	-Plan carefully to avoid fire hazards, maintain wildlife corridors, and prevent spread of weeds
	Provide low cost DSL and high speed internet for the area	High speed internet access suffers from affordability and competition	-Capitalize on high speed internet at a low cost will help attract businesses
	Create open store fronts for businesses to move in	Need capital and renovation projects to provide store space	
	Upgrade municipal infrastructure	Roads, subdivision infrastructure and water are inadequate for growth	-Need to invest in public works so that businesses are more attracted to this area
<b>Social and Community</b>	Market tourism focused on natural amenities; creating a tourism infrastructure that will not adversely affect the resources	Marketing is not sufficient and wild public lands are an underused asset	-Bird watching and wildlife watching attract a lot of visitors  -Forest Service visitor center; could be co-sponsored by Chamber and become a local center as well, connecting the Museum of the Rockies, Egg Mountain, Old Trail Museum, Old North Trail
	Maintain natural resources, rural culture and character	Continue to preserve viable wildlife populations, diversity of species and protection of habitat from fragmentation	-When building new developments for incoming populations, ensure that weeds are not spread
	Tailor education to support our economic strategies		-Need resources to understand the economic history of the area, and the potentials so that training can be tailored
	Increase community volunteerism	Without economic prosperity, and employment people are not committed to the area	-To attract the non-labor income industry we need to attract newcomers and retirees (market quality of life)
	Provide community education about the relationships between sustainable growth and cultural heritage		-Highway upgrade will contribute to tourism  -Heritage tourism is potential that will preserve local rural culture

**Workshop – Shelby, Toole County**  
**September 21, 2005**

This workshop included nine participants, with representation from the Chamber of Commerce, Port Authority, city government, and local medical center. The city planner and two county commissioners also attended. Two Sonoran Institute staff facilitated this focus group (Ray Rasker and Sarah Waring) and Kelley Shepp, the executive director of Sweetgrass Development was also in attendance.

Shelby elected officials and local government were focused on making Shelby a thriving community, both economically and socially. The workshop discussion centered on the strides Shelby has made towards economic diversification and community revitalization. By identifying local strengths, Shelby has been able to share resources, and assist businesses to invest and relocate. What was clearly identified during the workshop, however, was that the county and region have not been as successful in doing so. The most clearly identified solutions to regional problems were as follows: renew MSU distance learning center, attract business with affordable and reliable access to high speed internet, and develop a public transportation system to move workers to and from industry centers. Finally, participants identified the need for more retail and service business locally.

In the following table, the discussion from the Shelby focus group is summarized:

<b>Shelby</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic</b>	Diversify economy: projects that are other than agriculture, oil and gas, and transportation	Difficulty obtaining capital to invest in projects for economic diversification	
	Expand the private correctional facility – existing infrastructure will support 1500 beds	Community is undecided about value of increasing prison for region	-Opening community discussion around potential impacts and their mitigation through existing community discussion channels
	Expand tourism in the region	Not very many visitors because there is not much to attract them	-Plans for a privately funded, local museum that will showcase the region's heritage and history  -Plans for a 'World Championship Fight' Park, celebrating the boxing match  -Plans for a gun collection display in a local community museum
	Build a successful industrial park	Community infrastructure exists, but no place for companies to move	
	Train a qualified work force for incoming industries	There is a lack of trained workers for our new business/industry plans	-Development of training  -Maintenance of the Long Distance Learning Center from MSU

<b>Shelby</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Economic (continued)</b>	Keep our local physicians and medical staff	These are high wage jobs that we cannot retain in the community	-Need to advertise the existing amenities and community quality of life
	Create growth in higher wage job areas	Attracting small businesses and their employees is difficult	-Need access to high speed internet across the county  -Need to advertise the existing amenities and community quality of life
	Keep a busy and successful Main Street with lots of retail opportunities	Retail in Glacier County and Cascade is better and people will drive there instead	-Bring in support of local business leaders, especially women-
<b>Infrastructure</b>	Provide affordable housing for everyone, especially start-up homes so that people will move into Shelby	-There are a lot of people immigrating to work because housing is cheaper elsewhere.  -No capacity to build new homes, which is what incoming residents want	- Find partners to work with town of Shelby in demolition and building
	Retain long distance education facilities and improving training for workforce.	Existing long distance learning center is being shut-down by MSU, so Shelby is losing its local workforce training capabilities	-Convince MSU to retain long distance learning center  -Construct a facility to house GED, adult learning, traveling teachers, library, classrooms, etc, for surrounding region
	Maintain reliable regional water systems	-Smaller towns in Toole County have problems with water supply	
	Add sewage capacity to increase attractiveness to businesses and individuals	-Existing sewage system cannot handle any major increases, which becomes an economic obstacle	
	Provide affordable and convenient public transportation	-There is no bus system here, but a big existing need for intercity public transportation	- Develop area-wide transit system so that the workforce can commute easily

<b>Shelby</b>	<b><i>Visions of Success</i></b>	<b><i>Obstacles</i></b>	<b><i>Actionable Items and Solutions</i></b>
<b>Social and Community</b>	Preserve way of life and quality of life on the Montana High Line		-Increase community input on decisions, open discussions, and well-planned economic development  -Capitalize on community involvement to preserve heritage and foster growth
	Maintain annual growth rate of 1-2% annually over 20 years	Shelby does not have the existing infrastructure and capability to support that community growth, nor is it attractive enough to individuals	
	Provide opportunities for youth, especially for high wage jobs	No way to retain educated young workforce	



## Summary of Strengths and Weaknesses from Focus Groups

	STRENGTHS	WEAKNESSES
Cascade County		
	A metropolitan area a commercial airport, railroad service, and interstate highway	Need to compete globally and do not have the resources to put investment packages together
	Malmstrom Air Force Base (AFB)	Need to upgrade airport and AFB for further economic development
	National Institute of Health research and medical center	Historical attachment to agriculture as major industry results in a need to expand and explore complementary industries and value-added agriculture to diversify
	Strong governmental connection to 'Seven Sister Cities' in MT	Region surrounding metropolitan area is trying to compete, rather than working in collaboration with Great Falls
	Good community housing model, being adopted county-wide	No graduate program at university
	University campus	Young people are moving out because there is a lack of competitive wages
	Worker training through university	
	Educated workforce	
	A mid-point between Glacier National Park and Yellowstone National Park	
	Potential for new energy technologies being developed in region, especially wind and hydrogen	
Glacier County		
	Local models of successful business and community organizations: community college, federally funded medical clinic, immersion school, Syntex and Continental Oil Company	High unemployment, combined with a lack of educated workforce and prevalent drug and alcohol abuse problems
	Retail businesses in Cut Bank	Housing and health care deficiencies
	Proximity to Glacier National Park	Lack of investment in business development, combined with lack of knowledge of business practices, especially as related to investment on tribal lands
	Good water supply	No local service and retail skills training
	A rich and unique culture	Jail location issue, combined with law enforcement jurisdictional issues leads to racial and territorial tensions

	STRENGTHS	WEAKNESSES
Pondera County		
	Social investment in maintaining community character, especially connection to agrarian roots	No structural support in place for changing the economic emphasis and for diversification
	High quality of life	Lack of educated workforce to support an economic diversification initiative
	High non-labor income in county	High reliance on a few industries
	Potential for new technology development and green power investment	No experience in marketing to businesses and establishing a business friendly county; and no compelling packages for small businesses (i.e., tax incentives, revolving loans, community support, etc.)
	Good stewardship of local ecosystems	No research available on green power and technologies, also no trained workforce
	Proximity to Rocky Mountain Front; potential for tourism and high quality of life to attract footloose businesses	No expertise in community for governmental procedures and paperwork necessary to invite new businesses – need training
Teton County		
	Proximity to Rocky Mountain Front; potential for tourism and high quality of life to attract footloose businesses	Business plans are not completed due to lack of expertise and investment
	Potential for value-added agricultural products	No compelling packages for small businesses (i.e., tax incentives, revolving loans, community support, etc.)
	Potential to develop good relationships in county and region through specialization of economies	Old public works; municipal infrastructure no longer sufficient
	Bird, wildlife, and archeological resources major plus for attracting tourists, retirees, and businesses	No overall long term planning for the county which would capitalize on strengths and weaknesses
	Potential to connect community resources via technological and mechanical infrastructure	Lack of educated workforce to support diversification of economic base industries
Toole County		
	Strongly committed local government	No specialized training for incoming businesses
	City and County planner employed	Losing the long distance learning center from MSU that provides for the county
	Private correctional facility	No area-wide transit system to move employees
	Major transportation hub: rail, interstate highway, and highway 2, proximity to border crossing	Infrastructure, especially in smaller towns, can't support growth
	Proximity to Canadian markets	Not able to retain young adults
	Lots of social capital	Need further support to diversify economy and explore industries that complement agriculture
	Economic diversification projects beginning	

## REGIONAL PLAN OF ACTION

The economy of the Sweetgrass region appears to work as follows: Great Falls serves as the financial, retail trade, health care, and transportation center – the hub of the region. People in surrounding communities within reasonable driving distance to Great Falls often work and shop here. These communities are also able to support footloose businesses that choose to live in rural areas, but require easy access to larger markets. Further away, communities are smaller and more isolated, and each has had to develop its own strategy, independent of the influence of Great Falls. These areas are more dependent on agriculture, tourism, retirement and investment income. A few have identified and developed their unique competitive advantages, while others are on their way to doing so.

The region as a whole needs to focus on training and education to retain young adults and prepare the workforce for higher-skill, higher-wage jobs; regional partnerships that recognize regional complementarities; further diversify the economy beyond a historic reliance on commodity agriculture; provide incentives to technology-related industries; develop a set of financial tools and resources for entrepreneurs; and protect the area's high quality of life and unique natural environment.

Actions that are regional in nature and will benefit all counties are:

1. Upgrade the Great Falls airport (e.g., larger runway) and push for improved commercial service.
2. Develop a public transportation system to:
  - a. Increase opportunities to commute to job source areas (Fairfield, Shelby, Great Falls, and Glacier National Park).
  - b. Improve access to medical care in Great Falls or in other communities as they develop more medical capabilities.
  - c. Increase access to the Great Falls airport (via regional public bus transportation and/or via a private sector shuttle bus).
3. Establish a graduate program at the Montana State University College of Technology in Great Falls to accommodate training for industry and research employment. Maintain distance learning facilities in smaller area communities, such as the MSU center in Shelby.
4. Take advantage of an aging population and the trend toward retirement in places with recreational amenities by:
  - a. Funding remote campuses to train professional workers (e.g., nurses, engineering, architects, financial consultants, software programmers, marketing, medical research and management services).
  - b. Improve public transportation.
  - c. Targeted marketing to this demographic to promote the Sweetgrass region's high quality of life and affordable housing.
5. Promote further development of value-added agriculture:
  - a. Tie crop production to renewable energy (e.g. bio-diesel, ethanol).
  - b. Develop a regional meat packing plant to allow niche marketing of beef products.
  - c. Invest in specialty value-added agriculture facilities, such as malting plants.
6. Undertake regional land use planning to:

- a. Protect the region's competitive advantage in productive and scenic natural resources.
  - b. Identify areas where growth is desirable fiscally, economically and ecologically.
  - c. Prepare for the downsides of "amenity-driven" growth (e.g., unplanned growth that detracts from the region's amenities) and the rise of "footloose" businesses.
  - d. Prepare for growth with proper sewer, water and road infrastructure.
  - e. Halt the spread of weeds and maintain local ecological integrity.
- 7. Promote and coordinate regional tourism:
  - a. Recruit flight service that treats Great Falls as a "destination" airport.
  - b. Develop regional scenic byway.
  - c. Develop tourism within the Blackfeet Reservation that promotes, respects and celebrates tribal identity and sustainability, and links the Reservation to Glacier National Park.
  - d. Encourage marketing of cultural, historical, agricultural and scientific attractions (i.e., promoting heritage and regional history).
- 8. Promote the Sweetgrass region as a desirable place to live and do business.
- 9. Use Sweetgrass Development as an umbrella organization to:
  - a. Gather and share regional data.
  - b. Coordinate region-wide activities, especially between county and community economic development organizations.
  - c. Solicit outside investment for projects and activities with regional impact.

## **ACTION ITEMS, BY COUNTY**

### **Cascade County Action Items:**

- 1. Establish a graduate program at the MSU College of Technology to accommodate training for industry and research employment.
- 2. Upgrade airport (e.g., larger runway) for more regional access to larger markets and push for improved commercial service
- 3. Upgrade and diversify the Malmstrom AFB: more training exercises in the region's expansive air space, using the F-15s; improve AFB technology to be able to contract for the manufacturing of NASA space shuttle components.
- 4. Improve marketing with emphasis on community character, skilled labor force, affordability, and natural amenities such as national parks, wilderness areas and other public lands.
- 5. Commit resources to support investment packages for relocating and growing companies.
- 6. Expand research and technology development in the energy related businesses.
- 7. Adopt a hospital district and expand health care expertise and service; attract more physicians and medical technicians.
- 8. Promote value-added agriculture (e.g., malting and meat processing facilities) and small scale manufacturing (e.g., business networks and entrepreneurial roundtables).
- 9. Support city-county planning to ensure adequate supply and location of commercially zoned properties, safe and efficient travel network, and attractive urban fringe.

**Glacier County Action Items:**

1. Develop partnerships between businesses, community organizations, and tribal and local government to highlight area examples of successful business and celebrate them as models for local entrepreneurs.
2. Establish training centers or opportunities to educate the workforce on skills relevant to businesses and industries moving into the county.
3. Expand retail opportunities in Glacier County.
4. Re-invest in housing and public infrastructure to make communities more attractive, retain current population, and attract newcomers.
5. Utilize local, regional and national expertise to support entrepreneur training and networking.
6. Position Cut Bank and Browning as gateway communities to Glacier National Park.

**Blackfeet Reservation Action Items:**

These items are summarized from the Blackfeet Tribe Comprehensive Economic Development Strategy, completed in December 2002.

- a) Revise land use and environmental regulations, and strengthen their enforcement.
- b) Develop a planning framework for economic development within the Blackfeet Reservation wherein culture and heritage is used as the overarching theme.
- c) Establish a shared tribal repository for economic, historical, and cultural data on the Blackfeet Reservation.
- d) Complete community parks.
- e) Construct a grocery store.
- f) Create campground development close to Glacier National Park.
- g) Gain access to affordable telecommunications service.
- h) Develop small business information center and loan program.
- i) Expand Community Development Corporation (revolving loan funds for housing).
- j) Create a Community Development Entity (new markets tax credit program).

**Pondera County Action Items:**

1. Diversify agricultural economy, with emphasis on value-added enterprises.
2. Develop experience marketing local assets to entrepreneurs and small businesses.
3. Maintain high quality of life: uphold community friendliness, volunteerism, and safety; protect ecological diversity, wildlife, and natural resources.
4. Develop high-value, low-volume tourism based on the area's unique natural resources and cultural heritage.
5. Marshall financial resources to support business startups and expansion.
6. Support research on new technologies, especially green power technologies.
7. Keep pace with public works projects, especially municipal and transportation infrastructure.

**Teton County Action Items:**

1. Diversify the agricultural economy, with emphasis on value-added enterprises.
2. Develop a vision for an economic niche that takes advantage of proximity to Great Falls on the one hand, and the Rocky Mountain Front on the other.
3. Upgrade municipal infrastructure so that businesses are more likely to expand and relocate.
4. Develop plan to capitalize upon technology infrastructure, attract footloose entrepreneurs and complement current economic base.

5. Expand natural-amenities and resource-based tourism, marketing for wildlife and bird watching, hiking, etc.
6. Update county land use plan and regulatory framework to direct and minimize impacts of future growth, especially in areas around Choteau and Fairfield.
7. Enter into partnerships with organizations like the Museum of the Rockies to co-create centers of learning, scholarship, regional promotion, etc.

**Toole County Action Items:**

1. Expand and fund the Montana State University distance learning center for the training of the region's workforce.
2. Establish inexpensive access to high-speed internet for small businesses.
3. Develop a public transportation system between Sweetgrass and Great Falls and East Glacier-Babb and Chester.
4. Expand retail and service industries.
5. Increase tourism in the area by developing tourism infrastructure, and trading on cultural heritage and proximity to Glacier National Park.
6. Invest in value-added agriculture opportunities.
7. Attract more health care professionals.
8. Expand transportation related industries.
9. Develop an electrical transmission system between Lethbridge, Alberta and Great Falls, MT.
10. Develop green power generation capabilities in the area.
11. Update public infrastructure; expand housing opportunities.

## **PERFORMANCE MEASURES FOR FUTURE EVALUATION**

Following the adoption of this Comprehensive Economic Development Strategy document, and the formal acceptance by the Economic Development Administration, Sweetgrass Development, EDD, will measure and track the implementation of the CEDS action items.

Using the same data sources developed for this document, and through further focus groups, or “listening sessions,” the staff and board of Sweetgrass Development will continuously monitor and measure progress towards:

- Correction of the identified weaknesses in the local and regional economy; and
- Capitalization on the region’s strengths and comparative advantages.

A final measure of performance is whether, in addition to Sweetgrass Development, other area development agencies act in unison towards the common goals set forth in this CEDS. These are: the Small Business Development Center (SBDC); High Plains Financial; GAIN (Glacier County), TCDC (Teton County), PRPA (Pondera County), GFDA (Cascade County) and NETA (Toole County).

Coordination and communication among the various economic development entities is one of Sweetgrass Development’s ongoing roles.

## SUMMARY

University of Montana economist Larry Swanson points out that there are really three Montanas. Eastern Montana is for the most part agriculturally dependent, economically depressed, and depopulating. Western Montana is in the midst of an economic boom, driven in large measure by immigration for the region's quality of life. And there is the middle of Montana – counties on the edge of the mountains and the prairies – that could go either way. Today, residents of the Sweetgrass region have a choice: they can look to the west or to the east for their future.

A look toward the west would involve economic growth and diversification. It would increase wages and offer young adults an opportunity to remain in the region while attracting talent from elsewhere. It would welcome new ideas and require support for risk taking entrepreneurs. More than anything, it would necessitate a recognition that much of the region's competitive advantage resides in the high quality of life offered by its communities and unique natural amenities.

To be sure, an embrace of asset-based economic development and growing sectors of the larger region's economy will require investment and planning. Sewer and water facilities, transportation infrastructure, and rural land use planning are all crucial to support growth while protecting the region's precious landscape. Also vital are investments in education, such as remote campuses and facilities for training rural nurses, and technical assistance for entrepreneurs. Networks that can share information and marketing costs, and reduce risk through resource pooling and joint ventures will also be important.

The economic transformation underway in the Sweetgrass region mirrors national trends. Traditional natural resource sectors are not faring well, while a mix of low and high wage service industries are growing rapidly. A key challenge is to create value-added opportunities in traditional industries and ensure that area residents are prepared to work in higher wage service occupations. The population is aging and there is rapid growth in retirement income, investment income, and from other non-labor sources. The region can capitalize on these economic and demographic trends, and some communities are already doing so.

An overall view of the Sweetgrass region's economy should give residents reason for hope. In the late 1990s and early 2000s the economy pulled out of a long period of stagnation. While employment growth could be higher, and the income disparities between sub-sectors of the population could be smaller, the region boasts relatively high education rates, earnings and per capita income. It is relatively diverse economically, with a preponderance of affordable homes, and the unemployment rate is low – with the notable exception of the Blackfeet Reservation. The western edge of the region is a paradise for hunters, anglers, hikers and horseback riders. It is one of the most beautiful places in the world.

The key to success will be to create a setting that makes the Sweetgrass region an attractive place to live and do business, and that encourages entrepreneurship to thrive. Many thoughtful conversations were held to inform the development of this document. From these we can attest that the area's social capital – the ability of residents to act on their values for the greater good of the community – is high. Social capital is rarely talked about in economic development circles, but it is a comparative strength for the region and will be a crucial ingredient in taking the ideas suggested by focus groups participants and outlined in this document to fruition.



## **ADDENDUM - Energy Development**

Because there is a history of limited energy development in the Sweetgrass region, and because recent proposals to drill in the Blackleaf area of the Rocky Mountain Front have been controversial enough that the BLM temporarily withdrew its consideration of proposed drilling, we investigated this issue further. Although it is beyond the scope of this document to estimate the potential for jobs and income from full energy development along the Front, a review of Environmental Impact Statements (EIS) reveals that the boost in jobs comes early on during the drilling phase, and then tapers down significantly during production.

A 1992 EIS for the BLM's Blackleaf area estimated that each gas producing well would create 26 full-time and 36 part-time *short term* jobs per new well, and in the *long term* two direct and indirect jobs per well that stays in production.<sup>110</sup> Representatives from Startech Energy Inc., a lease holder from Alberta, Canada, stated that five to seven jobs would be created by its proposal to drill public lands along the Front.<sup>111</sup>

It is important to note that in the six focus groups oil and gas development as a potential job stimulant was brought up by only a couple of people. When it was mentioned by others, it was in the context of its historic role. For example, in Shelby it was pointed out that while oil rig workers tended to live in Cut Bank, the financial institutions financing energy development settled in Shelby. Hydrogen was also brought up in the context of the potential space shuttle project in Great Falls. Ethanol and wind farm energy also came up in discussion.

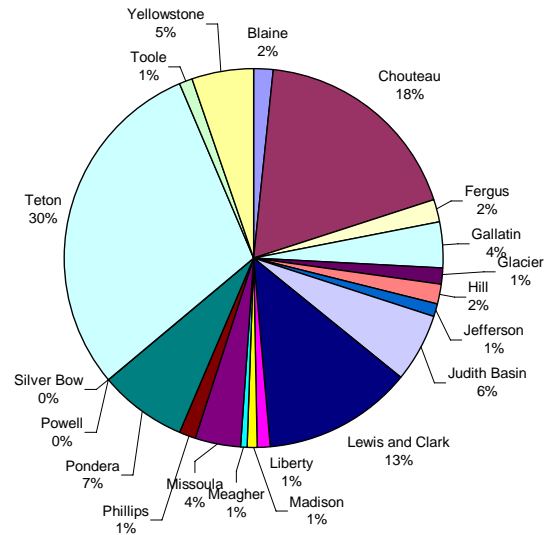
In Teton County, near the Blackleaf area, the local debate on oil and gas has been ongoing. A letter to the Great Fall Tribune in 2004 submitted by Mary Sexton, then a Teton County Commissioner, pointed out that the tax structure today does not allow the county to benefit from gas development the way they did in the 1980s. During the 1980s, Teton County received almost 18 percent of gross proceeds, which totaled around \$400,000 from oil and gas taxes annually. As Sexton points out: "If the same amount of annual gross proceeds (about \$2 million) came from gas production now, Teton County would receive half of 0.75 percent for the first 18 months, or about \$7,600 annually. In the first couple of years of production, county government services would get less than \$2,500. In later years about \$27,000 – one half of one percent of our county budget – that is, if production continues." Sexton also notes that the cost to the county of the maintenance of the Teton River Road into the Blackleaf area, assuming 140 trips by oil trucks and semi trucks, would cost the county between \$10,000 and \$20,000 each year.<sup>112</sup>

A press release by the Department of the Interior entitled "Bureau of Land Management, U.S. Fish and Wildlife Service Move to Conserve Wildlife along Rocky Mountain Front" makes it clear that gas development on the Front is not a high priority, and therefore unlikely to be a source of economic growth in the foreseeable future. In the article Rebecca Watson, Assistant Secretary of the Interior for Land and Minerals Management, is quoted as saying, "Clearly, development along the Front is a complex issue. President Bush has met with hunters and anglers and told them there are some places that should not be developed in order to protect wildlife. The Rocky Mountain Front is important for wildlife and is of great interest to the hunting community. There is very little existing development in this area and we need to step back and look at the issue on a landscape level to be sure we conserve our resources in a balanced way."<sup>113</sup>

## APPENDIX A – Where People are Commuting

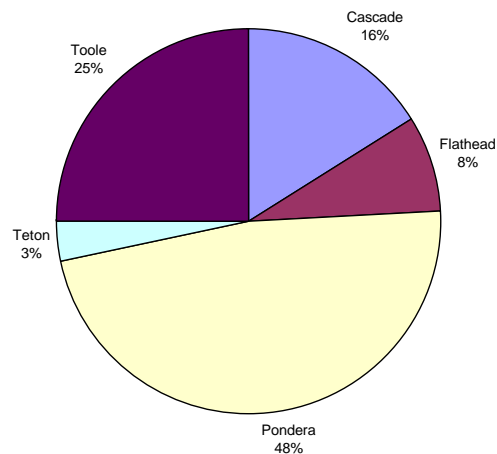
### CASCADE COUNTY

Workers in Cascade County Who Commute Out of County (1,241 workers, 3% of workforce)  
Commute to .....



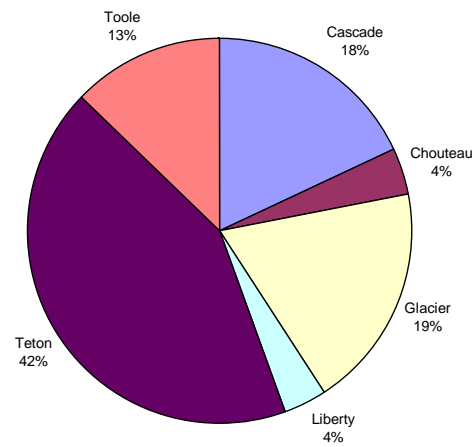
### GLACIER COUNTY

Workers in Glacier County Who Commute Out of County (120 workers, 3% of workforce)  
Commute to ....



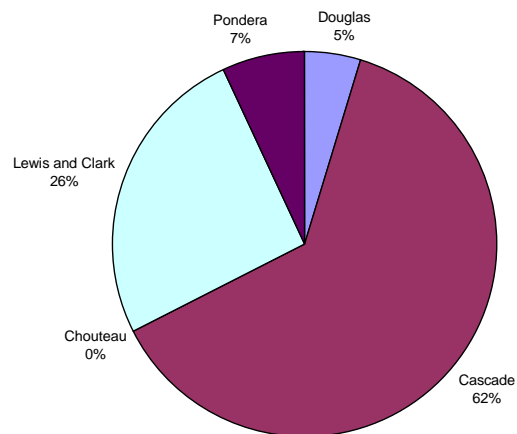
## PONDERA COUNTY

Workers in Pondera County Who Commute Out of County (220 workers, 8% of workforce)  
Commute to ....



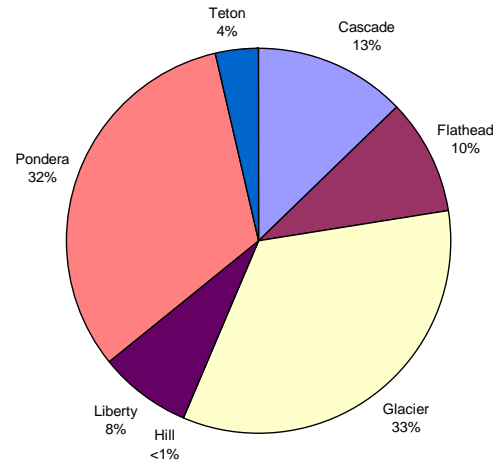
## TETON COUNTY

Workers in Teton County Who Commute Out of County ( 172 workers, 8% of workforce)  
Commute to ....



## TOOLE COUNTY

Workers in Toole County Who Commute Out of County (334 workers, 14% of workforce)  
Commute to ....



## **APPENDIX B**

### **ECONOMIC PROFILE OF THE SWEETGRASS DEVELOPMENT REGION**

The following is a detailed socioeconomic profile of the region. Similar profiles of individual counties are available in PDF format from the Executive director of Sweetgrass Development.

## ENDNOTES

- <sup>1</sup> Blackfeet Tribe Comprehensive Economic Development Strategy, 2002.
- <sup>2</sup> Data sources for this section: Regional Economic Information System (REIS CD-ROM) of the Bureau of Economic Analysis, U.S. Department of Commerce. See also page 30 of Appendix B.
- <sup>3</sup> Coalition to Protect the Rocky Mountain Front: Homepage: <http://www.savethefront.org/front/index.php>. (accessed December 21, 2005).
- <sup>4</sup> Forest Service Montana Partners projects: <http://montanapartners.fws.gov/mt3d6a.htm>
- <sup>5</sup> Wikipedia contributors, "Marias River", Wikipedia, The Free Encyclopedia, [http://en.wikipedia.org/wiki/Marias\\_River](http://en.wikipedia.org/wiki/Marias_River) (accessed December 5, 2005)
- <sup>6</sup> Montana Watersheds, Watershed and Landscape Groups, <http://water.montana.edu/watersheds/groups/details.asp?groupSubMajorBasin=Marias&groupID=28> (accessed December 5, 2005)
- <sup>7</sup> National Park Service, Glacier National Park: <http://www.nps.gov/glac/>
- <sup>8</sup> United States Census Factfinder. <http://factfinder.census.gov/servlet/SAFFPopulation?sse=on> . (accessed December 19, 2005)
- <sup>9</sup> Wikipedia contributors, "Montana Demographics", Wikipedia, The Free Encyclopedia, <http://en.wikipedia.org/wiki/Montana#Demographics> (accessed December 5, 2005)
- <sup>10</sup> Wikipedia contributors, "Blackfeet Indian Reservation," Wikipedia, The Free Encyclopedia, [http://en.wikipedia.org/w/index.php?title=Blackfeet\\_Indian\\_Reservation&oldid=23700582](http://en.wikipedia.org/w/index.php?title=Blackfeet_Indian_Reservation&oldid=23700582) (accessed December 1, 2005).
- <sup>11</sup> Blackfeet Tribe Comprehensive Economic Development Strategy, 2002. p. 3
- <sup>12</sup> Ibid, page 6.
- <sup>13</sup> Blackfeet Tribe Comprehensive Economic Development Strategy, 2002. p. 7
- <sup>14</sup> <http://www.choteauacantha.com/articles>
- <sup>15</sup> Arnie Gettel, County Commissioner , personal communication 12/1/05. Various estimates were given to the authors of the number of Hutterite colonies in the region. We acknowledge that Mr. Gettel's figures are but one of several estimates.
- <sup>16</sup> <http://www.cutbankchamber.com/visit/hutterite.htm> The Hutterite web site <http://www.hutterianbrethren.com/> reports there are 43 Hutterite colonies in Montana.
- <sup>17</sup> Data sources for this section: Regional Economic Information System (REIS CD-ROM) of the Bureau of Economic Analysis, U.S. Department of Commerce; Bureau of Labor Statistics, U.S. Department of Labor; County Business Patterns, Bureau of the Census, U.S. Department of Commerce; U.S. Bureau of Census.
- <sup>18</sup> U.S. Census Bureau, State and County Quick Facts; <http://quickfacts.census.gov/qfd/states/30000.html> (accessed December 6, 2005)
- <sup>19</sup> Adapted from methods developed for: Rasker, R., B. Alexander, J. van den Noort, R. Carter. 2004. Public Lands Conservation and Economic Well-Being. Sonoran Institute. Bozeman, Montana; and for: Hansen, A.J, R. Rasker, B., Maxwell, J.L. Rotella, J.D. Johnson, A. Wright Parmenter, U. Langer, W. B. Cohen, R. L. Lawrence, and M. P.V. Kraska. 2002. "Ecological Causes and Consequences of Demographic Change in the New West." BioScience. Vol. 52(2): 151-162.
- <sup>20</sup> PDF versions of individual counties are on file with the Executive Director of Sweetgrass Development. Data sources for this section: Regional Economic Information System (REIS CD-ROM) of the Bureau of Economic Analysis, U.S. Department of Commerce; Bureau of Labor Statistics, U.S. Department of Labor; County Business Patterns, Bureau of the Census, U.S. Department of Commerce; U.S. Bureau of Census.
- <sup>21</sup> [www.fsa.usda.gov/dafp/cepd/stats/FY1997.xls](http://www.fsa.usda.gov/dafp/cepd/stats/FY1997.xls)
- <sup>22</sup> *The Conservation Reserve Program: Economic Implications for Rural America / AER-834* Economic Research Service/USDA., [www.ers.usda.gov/Publications/aer834/aer834d.pdf](http://www.ers.usda.gov/Publications/aer834/aer834d.pdf)
- <sup>23</sup> Ibid.
- <sup>24</sup> Ted Monoson. "Montana Nets \$4.2 Million in Grazing Funds." Casper Star Tribune. April 2, 2003.
- <sup>25</sup> Ibid.
- <sup>26</sup> Historical data is organized by the U.S. Department of Commerce according to the Standard Industrial Classification (SIC) system, which ended in 2000. In 2001 the Department began using the North American Industrial Classification System (NAICS), which is not backward-compatible with SIC. The personal income by industry line graphs were developed using SIC data to show long-term trends. More recent data, on employment and wages, is shown for 2003, which is the latest data available.

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[http://factfinder.census.gov/servlet/SAFFacts?\\_event=Search&geo\\_id=&geoContext=&street=&county=cascade+county&cityTown=cascade+county&state=04000US30&zip=&lang=en&sse=on&pctxt=fph&pgsl=010](http://factfinder.census.gov/servlet/SAFFacts?_event=Search&geo_id=&geoContext=&street=&county=cascade+county&cityTown=cascade+county&state=04000US30&zip=&lang=en&sse=on&pctxt=fph&pgsl=010) (Accessed March 6, 2006)
- <sup>29</sup> Great Falls Housing Authority website <http://www.greatfallsha.org/index.htm> (Accessed March 6, 2006)
- <sup>30</sup> Community Block Grant and HOME Development, Great Falls Community Development Department:  
[http://www.ci.great-falls.mt.us/people\\_offices/cdev/cdbg/index.htm](http://www.ci.great-falls.mt.us/people_offices/cdev/cdbg/index.htm) (Accessed March 6, 2006)
- <sup>31</sup> Public Schools Report <http://schools.publicschoolsreport.com/Montana/GreatFalls/GreatFallsHighSchool.html> (Accessed March 6, 2006)
- <sup>32</sup> Great Falls School System <http://www.gfps.k12.mt.us/Schools/Schools.html> (Accessed March 6, 2006)
- <sup>33</sup> National Register of Historic Places;  
<http://www.nationalregisterofhistoricplaces.com/MT/Cascade/districts.html> (Accessed March 6, 2006)
- <sup>34</sup> Travel Montana website; <http://www.visitmt.com> (Accessed March 6, 2006)
- <sup>35</sup> Community Recreation Great Falls; [http://www.ci.great-falls.mt.us/people\\_offices/park\\_rec/index.htm](http://www.ci.great-falls.mt.us/people_offices/park_rec/index.htm) (Accessed March 6, 2006)
- <sup>36</sup> Great Springs State Park; Parks and Recreations Home: [http://fwp.mt.gov/lands/site\\_282690.aspx](http://fwp.mt.gov/lands/site_282690.aspx) (Accessed March 14, 2006)
- <sup>37</sup> State Parks Region 4, Parks and Recreation Home: [http://fwp.mt.gov/lands/search.aspx?st=sp&q=CTY\\_11\\_50](http://fwp.mt.gov/lands/search.aspx?st=sp&q=CTY_11_50) (Accessed March 14, 2006)
- <sup>38</sup> EPA Superfund Sites Region 8; <http://www.epa.gov/region8/superfund/sites/mt/carpenter-snowck.html> (Accessed March 6, 2006)
- <sup>39</sup> EPA Superfund Sites Region 8; <http://www.epa.gov/region8/superfund/sites/mt/barker-hughes.html> (Accessed March 6, 2006)
- <sup>40</sup> Montana Natural Resources Information System, by geographic location, Environmental Impacts:  
<http://maps2.nris.state.mt.us/mapper/ThemeList.asp?Profile=1969909&qLayer1=County&qField1=County&qV alue1=Cascade&Oper1=&Buffer1=0&TabName=Land%20Information> (Accessed March 16, 2006)
- <sup>41</sup> Fish, Wildlife and Parks, FieldGuide site: [http://fwp.mt.gov/fieldguide/detail\\_ABNKC10010.aspx](http://fwp.mt.gov/fieldguide/detail_ABNKC10010.aspx) (Accessed March 15, 2006)
- <sup>42</sup> Fish, Wildlife and Parks, FieldGuide site: [http://fwp.mt.gov/fieldguide/detail\\_AMAJH03010.aspx](http://fwp.mt.gov/fieldguide/detail_AMAJH03010.aspx) (Accessed March 15, 2006)
- <sup>43</sup> Blackfeet Tribe Comprehensive Economic Development Strategy, 2002. p. 36
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- <sup>45</sup> Blackfeet Tribe Comprehensive Economic Development Strategy, 2002. p. 39
- <sup>46</sup> Malkin, Jennifer, with Dabson, Pate and Mathews. 2004, December. Native Entrepreneurship: Challenges and Opportunities for Rural Communities, p. 51
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- <sup>48</sup> Malkin, Jennifer, with Dabson, Pate and Mathews. 2004, December. p. 21
- <sup>49</sup> Harvard Project for American Indian Economic Development. *Proceedings from a Session on Strategic Planning, Institutional Development and Policymaking for Nation Building*. Cambridge, MA: Harvard University. As cited by Malkin, Dabson, Pate and Mathews. 2004, December. Native Entrepreneurship: Challenges and Opportunities for Rural Communities, p. 19.
- <sup>50</sup> Malkin, Jennifer, with Dabson, Pate and Mathews. 2004, December. p. 39
- <sup>51</sup> Ibid., p. 40-41
- <sup>52</sup> Ibid., p. 55
- <sup>53</sup> Ibid., p. 55-56
- <sup>54</sup> Glacier County Government <http://www.glaciercountymt.org/services.htm> (Accessed March 6, 2006)
- <sup>55</sup> U.S. News website, Health and Hospitals Directory;  
[http://www.usnews.com/usnews/health/hospitals/directory/glance\\_6810050.htm](http://www.usnews.com/usnews/health/hospitals/directory/glance_6810050.htm) (Accessed March 6, 2006)
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- <sup>58</sup> U.S. Department of the Census Quickfacts; <http://quickfacts.census.gov/qfd/states/30/30035.html> (Accessed March 6, 2006)

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- <sup>60</sup> Blackfeet Community College website History and Information; <http://www.bfcc.org/History.html> (Accessed March 6, 2006)
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- <sup>62</sup> University of Montana; Tribal Law website; <http://www.montana.edu/wwwai/imsd/rezmeth/blackfeetlaw.htm> (Accessed March 6, 2006)
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- <sup>66</sup> Browning Montana Official site; <http://www.browningmontana.com/> (Accessed March 2, 2006)
- <sup>67</sup> National Park Service, Glacier National Park site; <http://www.nps.gov/glac/index.htm> (Accessed March 2, 2006) and Wikipedia, Glacier National Park site: [http://en.wikipedia.org/wiki/Glacier\\_National\\_Park\\_%28U.S.%29](http://en.wikipedia.org/wiki/Glacier_National_Park_%28U.S.%29) (Accessed March 17, 2006)
- <sup>68</sup> Biosphere Reserves site; <http://www.deh.gov.au/parks/biosphere/> (Accessed March 2, 2006)
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- <sup>73</sup> Pondera County Government, Health Department; [http://ponderacountymontana.org/health\\_dept\\_.htm](http://ponderacountymontana.org/health_dept_.htm) (Accessed March 2, 2006)
- <sup>74</sup> Pondera County Government, Sanitarian; <http://ponderacountymontana.org/sanitarian.htm> (Accessed March 2, 2006)
- <sup>75</sup> Pondera Medical Center website; <http://www.ourpmc.com/> (Accessed March 2, 2006)
- <sup>76</sup> Public Schools Report, Pondera County; <http://schools.publicschoolsreport.com/county/MT/Pondera.html> (Accessed March 2, 2006)
- <sup>77</sup> Montana State University Extension Service; [http://ponderacountymontana.org/msu\\_extension.htm](http://ponderacountymontana.org/msu_extension.htm) (Accessed March 2, 2006)
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- <sup>79</sup> Pondera County Government, Sheriff's site; [http://ponderacountymontana.org/sheriff's\\_department.htm](http://ponderacountymontana.org/sheriff's_department.htm) (Accessed March 2, 2006)
- <sup>80</sup> Historical Markers by State; <http://photos.historical-markers.org/mt-pondera> (Accessed March 2, 2006)
- <sup>81</sup> Montana Natural Resources Information System, by geographic location, Environmental Impacts: <http://maps2.nris.state.mt.us/mapper/ThemeList.asp?Profile=1969873&qLayer1=County&qField1=County&qV alue1=Pondera&Oper1=&Buffer1=0&TabName=Environmental%20Impacts> (Accessed March 16, 2006)
- <sup>82</sup> Fish, Wildlife and Parks, Threatened and Endangered; <http://fwp.mt.gov/wildthings/tande/wolf.html> (Accessed March 15, 2006)
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- <sup>93</sup> Teton County Government, History ; <http://www.tetoncomt.org/history.aspx> (Accessed March 2, 2006)
- <sup>94</sup> Teton County Government, Conservation District; <http://www.tetoncomt.org/conservationdistrict/index.aspx> (Accessed March 2, 2006)
- <sup>95</sup> Natural Resource Information System, Biological Information site; <http://maps2.nris.mt.gov/mapper/ThemeList.asp?Profile=1970955&qLayer1=County&qField1=County&qValue1=Teton&Oper1=&Buffer1=0&TabName=Land%20Information> (Accessed March 17, 2006)
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- <sup>99</sup> Public Schools Report, Toole County; <http://schools.publicschoolsreport.com/county/MT/Toole.html> (Accessed March 2, 2006)
- <sup>100</sup> Shelby Chamber of Commerce, Tourism site; <http://www.shelbymtchamber.org/Tourism-Links.htm> (Accessed March 2, 2006)
- <sup>101</sup> Shelby Chamber of Commerce, Parks and Recreation site; [http://www.shelbymt.com/park\\_&\\_recreation.htm](http://www.shelbymt.com/park_&_recreation.htm) (Accessed March 2, 2006)
- <sup>102</sup> Environmental Protection Agency Brownfields Grants, Shelby MT; <http://www.epa.gov/swerosps/bf/05grants/shelby.htm> (Accessed March 2, 2006)
- <sup>103</sup> Fish, Wildlife and Parks, Threatened and Endangered site; [http://fwp.mt.gov/fieldguide/detail\\_AMAJF02040.aspx](http://fwp.mt.gov/fieldguide/detail_AMAJF02040.aspx) (Accessed March 15, 2006)
- <sup>104</sup> Montana Natural Resource Information System, by geographic area, Environmental Impacts: <http://maps2.nris.state.mt.us/mapper/ThemeList.asp?Profile=1969756&qLayer1=County&qField1=County&qValue1=Toole&Oper1=&Buffer1=0&TabName=Environmental%20Impacts> (Accessed March 16, 2006)
- <sup>105</sup> NPS, National Wild and Scenic Rivers, Montana <http://www.nps.gov/rivers/wsr-missouri-montana.html> (Accessed March 16, 2006)
- <sup>106</sup> Montana Natural Resource Information System, by geographic area: <http://maps2.nris.state.mt.us/mapper/ThemeList.asp?Profile=1969756&qLayer1=County&qField1=County&qValue1=Toole&Oper1=&Buffer1=0&TabName=Water> (Accessed March 16, 2006)
- <sup>107</sup> USGS Montana Water Information Center; <http://mt.water.usgs.gov/> (Accessed March 16, 2006)
- <sup>108</sup> Environmental Protection Agency, Clean Air Act Non-Attainment; <http://www.epa.gov/air/data/repst.html?st~MT~Montana> (Accessed March 16, 2006)
- <sup>109</sup> The Economic Profile System (EPS) is public domain software found at [www.sonoran.org/eps](http://www.sonoran.org/eps).
- <sup>110</sup> By comparison, the Price Utah draft EIS projected that 83 jobs would be created during the development of the wells (short term), and this would decline to two long-term direct and indirect jobs once the wells were in production (long term). Similar findings were reported in the 2004 draft EIS for the Jack Morrow Hills, also in Utah. See [www.mt.blm.gov/ldo/eis/blackleaf](http://www.mt.blm.gov/ldo/eis/blackleaf); [www.ut.blm.gov/landuseplanning/updates.htm](http://www.ut.blm.gov/landuseplanning/updates.htm); [www.wy.blm.gov/jmhcap/sdeis/](http://www.wy.blm.gov/jmhcap/sdeis/)
- <sup>111</sup> Startech Energy Inc.(Alberta, Canada), December 3, 2003 meeting of the Central Montana Resource Advisory Council : <http://www.mt.blm.gov/ea/rac/central/03minutes.pdf>, p. 53. "We are probably looking at 5-7 people, maybe 9 at the most." Startech reported to the RAC that there was only a "1 in 4 to 1 in 3" chance of finding economically recoverable natural gas. <http://www.mt.blm.gov/ea/rac/central/03minutes.pdf>, p. 50. Startech officials were quoted on Montana Public Radio during a May 4, 2004 story: "There would be certain number of jobs perhaps [pause]...perhaps five jobs on a permanent full time basis." MPR Evening Edition story by Kirk Siegler on May 4, 2004

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<sup>112</sup> Mary Sexton, *Guest/Opinion*, Great Falls Tribune, Sunday July 4, 2004: page 9, section A.

<sup>113</sup> News: U.S. Department of the Interior: *Bureau of Land Management, U.S. Fish and Wildlife Service Move to Conserve Wildlife along Rocky Mountain Front.*, <http://www.doi.gov/news/041005a>