



FIVE YEAR PLAN

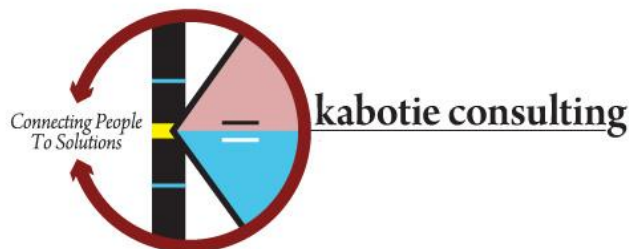
Created by

Montana State Tribal Economic Development Commission

October 9-11, 2013 Browning, MT

Economic Development Vision

Facilitated and documented by



Contents

This report contains the results of the 2013 Montana State Tribal Economic Development Commission five year strategic planning session.



3 – 9

Tribal Economic History & Current Environment

This section of the report holds the results of five conversations designed to begin the strategic planning work planted in the history of tribal economic development as well as the current reality of the MT STEDC. In addition to a historical review of data, these include responses to questions on basic data, trends, accomplishments and advantages.



10 – 14

Practical Vision Workshop

This section of the report holds the MT STED Commission's vision for economic development in the year 2018. It is the motivating picture of the future that gives guidance to current economic development priorities for the work of the MT STED Commission.



14 – 16

Underlying Contradictions Workshop

This section of the report represents the group's analysis of issues and of the obstacles blocking progress towards its economic development vision. This insightful look at contradictions assists the group in assuring its development strategies are grounded in reality.



17 – 19

Targeted Accomplishments

This section documents the economic development priorities of the MT STED Commission. It represents the key actions the group has targeted for the next two years. The strategies provide the group with succinct statements that give a sense of the economic development priorities that become a 'touchstone' for action and development choices over the next two years.

20 – 21

Critical Next Steps, Participant List

The group identified critical next steps to begin to mobilize their Strategic Plan; these steps are recorded here, along with the participant list.





History & Current Environment Scan

In completing a scan of the environment, it is important to create a “snapshot” of economic development as it currently exists ~shaped by the history of economic development as it impacts the work of the MT STED Commission as the history lives in the memories of participants and the group’s understanding of the current day reality in which the enterprise vision will be developed.

In this session participants shared information on the history of Tribal economic development within the State, as well as the Basic Data, Trends that impact the MT STEDC economic development work, Advantages and Recent Accomplishments that the Tribes have achieved in the past 3-5 years. These discussions help set the stage for the creation of a practical vision that is grounded in the reality of the MT STED Commission.



Montana Tribal History of Economic Development

Native Economies Altered	Tribal Resources Taken from Tribe	Resurgence of Indian Self Determination, Governance, Sovereignty	Tribes No Longer Fear Termination and Focus on Empowerment
Pre1940's into the 1940's	1950	1960's & 70's	1980
<ul style="list-style-type: none"> • U.S. Government warfare on own people • Historical trauma - Reservations • Termination policies • Allotment Act • Indian Education for all - MT Constitution • Trade for survival • WWII • Start of Fractionation • Shift of Personal economies 	<ul style="list-style-type: none"> • Indian affairs office established • Oil & gas Development • Autos nationally • Surveying of property/ land • Timber harvest production • Tribal revenues generated & employment • Big industries take advantage of Indian resources • Tribal Ag. big 	<ul style="list-style-type: none"> • E.D.A Economic development Administration • AIM brought to light abuses • Influx of federal dollars trigger development • Tribes received 100% grants - no matching - lots of development • Tribes openly practicing religion • Policy changes give tribes more resources to determine own path • State-Tribal agreements Re: Resources • Water rights • 'Race to the Courthouse' every time tribes took action • Coal Development • Tribal colleges • Nixon administration reinforces tribal sovereignty • Sovereignty Recognition • Self determination • Water settlements were started by Feds/State/tribe 	<ul style="list-style-type: none"> • State Tribal relations Committee • AIHEC • Education • MT state constitution re-written with Indian tribes recognized • Water compacts • Elected one Native American to state legislature • 8A's Competitive opportunity for natives is huge! • People go off res. For banking • Local banks closing • MDOT Improving roads • Forestry Reserves



Shift to Local/Internal Recognition of Tribal Participation	Becoming Stronger, Louder Voice & State is Listening	Policy, Economy & Environment Pushing Tribes to Stand on Own
1990	2000-2010	2013
<ul style="list-style-type: none"> • State – tribal relationship • Native American Economic Development Act • Cooperative & revenue sharing agreements • Revenue sharing brought money to tribal coffers • State gov’ starts thinking of laws introduced by Native American Representative • State money allocated but tribes couldn’t use it 	<ul style="list-style-type: none"> • Schweitzer elected to governor • Gaming • Indian education for all • Election of a democrat Governor • 10 Native American representatives elected to MT house & state legislation • Gov. Schweitzer invited all tribes in MT to table • I.C.E.D program (Indian country economic development) • Federal reserve –support • Tribal Consortium • State recognition • Stimulus funds \$5 million • Project development • Energy Development (Oil & gas) Bakkan • Cobell • Uniformity in lending laws • Support Governor’s office on Economic development • UCC (Uniform Commercial Codes) – Lien filing System 	<ul style="list-style-type: none"> • 2013 tea party blaming Indians for issues with federal spending • U.S. Government shutdown • Gear up tribal colleges use federal money for match • Funds are contracting feds • President of U.S. actively standing up for Indians • Value for tribal language & culture • Tribes have to do well & be prepared to defend against adversary mindsets • U.S. government providing more recognition of tribes while also cutting back progressively • Tribal language viewed as vehicle for healing, knowing and being native.





Environmental Scan

Environmental Scan: **Basic Data**

- Have a Commission – all 8 tribes of MT
- \$70,000 per tribe/= \$560k/yr
- Aggregate data on total \$ tied with state budget (1.Revenue Sharing, 2.State \$ for individual, 3.Federal pass thru, 4. State infrastructure)
- Unemployment data from state? At 5% for MT – variable w/ tribes. Tribes excluded.
- Distribution of tourism dollars (\$8m not distributed proportionately with tribes)
- Urban Indian data not specific to tribe and not fully quantified
- State budget for Indian country grant \$ (\$1.6m for 2 yrs. For I.C.E.)
- Unemployment Rate – state 5% tribes 40% (?)
- Tribes – no tax base, dependent on federal and state resources
- Impact aid only provides 40-50% of total funding
- MT Indian country mainstreet survey outcomes
- Consistent performance reporting (jobs, leverage training, businesses supported, audits)
- \$126k/yr to Native American businesses (MT Indian Equity Fund)
- \$1.2 billion Tribal contribution to state economy (need private entity economy data)
- 26+14=\$40 k/yr technical assistance to tribes
- Data in Reservation economic demographic flyers (Money, Jobs, specific tribes data spelled out by tribe)
- Educational data / OPI
- Leverage
- Reap economic analysis of reservation \$ contribution
- Technical assistance available at each tribe to assist business
- All tribes have economic development staff, priorities, agendas



Environmental Scan: **Positive (+) Trends**

- Tribal colleges increase education to bring back to communities
- Prioritize Accountability, efficient
- Indian language preservation money
- Tribes are more accountable for money
- Tribal resources more accessible
- Self governance thru PL 93-638
- Consultation between executive branch and tribal nations
- MT has general fund budget surplus
- Collaboration in no longer optional (Sharing information)
- University system collaboration between state, tribal colleges and executive
- Globalization of resources
- More Native American participating in state government (employees, elected, appointed)
- Native CDFI's
- Tribes putting educated Native American to work at home and at other tribes
- Improved state and tribe relationship

Environmental Scan: **Negative (-) Trends**

- Reduced funding across the board
- Too much red tape
- Rich getting richer, poor getting poorer
- Persistent education of federal (BIA), State (legislative) government and private sector (banks)
- Media (Credibility of our data)



Environmental Scan: Recent Accomplishments 3-5 Years

- STED oversaw \$5m of stimulus – 1st time – opened avenues of what it can do
- Montana Indian Equity Fund distribution
- Economic impact studies commissioned for legislative & tribes
- Develop and update brochures for tribes
- Legislature has continued to fund STEDC
- Creation of STEDC Indian equity fund matching funds (2017)
- Support for ICED
- Legal infrastructure uniformity (UCC)
- Broadband consortium – 1st ever
- Monetary contributions impact to state = \$1.2b 2003
- Greater access to state resources
- More tribal and enrolled member access to financing
- State government collaboration because of STEDC and federal entities (Secretary of state's office, Executive and tribes)
- ICED money new business/jobs
 - council recognition importance of private business
- History – good/bad data Improve!
- Tribally owned corporations
- Improved relations with state
- State leadership on the rise
- Entrusted with \$2m in language preservation money because of ability to work well with MT and tribes
- Acceptance that STED Commission is real reflective
- STEDC seen as voice for tribes and called on to testify. Seen as credible, viable and someone to support.



Environmental Scan: **Advantages**

- Longevity
- Can communicate issues
- Access between state and tribes established, codified & credible
- Support (state – tribal relationship in action)
- Base funding (general fund for STEDC, flexible House Bill 2)
- Innovative (STEDC Indian equity fund & ability to capture other sources of funding)
- Recognition/Stature
- Taxation Incentives
- Natural resources
- Generational connection (land, culture, language)
- Sustainability-stability
- Knowing Communities – land base of reservation
- Understanding the political environment
- Children/youth are better educated
- Land and natural resources
- Federal Government Recognize tribes as partner in land management decisions
- Tribes eligible for tax audits to encourage each development
- Adoption of portions of UCC





Practical Vision

Everyone owns the vision of the future; we each hold it in our imagination.

In this workshop, participants are invited to bring their imagination and optimism to the table and help weave a complete picture of how the Montana State Tribal Economic Development Commission's development efforts should support, advance or positively impact the economic viability, posture and stability of the State's Tribes', peoples and communities.

Participants were asked to consider and describe the desired future that would be achieved through economic development efforts of the MT STEDC.

The focus question before the group was:

*What do we see in place in the year 2018
As a result of the Commission's successful efforts to support
Tribal economic development?*





MT STEDC VISION 2018

Consensus Vision Statements

The following statements represent the group’s consensus after discussing the individual elements of the vision. These Vision Elements capture the group’s insight on their collective intent in each arena.

Towards Actualizing Leadership		Towards Economic Independence		Towards Collaboration, Prosperity & Empowerment	
EVERY TRIBE HAS BUILDING BLOCKS IN PLACE TO ENGINEER THEIR OWN ECONOMIC PROSPERITY	PROACTIVELY GENERATED DATA THAT IS REPRESENTATIVE, TIMELY, USEFUL & MODELS – SUPPORTS DECISION MAKING & EVALUATION	VIBRANT PROGRAMS & POLICIES THAT CONTINUALLY EVOLVE & SUPPORT LOCAL ECONOMIC INDEPENDENCE & INNOVATION		PROACTIVE, COMPREHENSIVE VISIBLE CAPACITY TO EMPOWER NATIVE PEOPLE	BRIDGE FOR EXTERNAL RESOURCES & OPPORTUNITIES TO EMPOWER GRASSROOTS DEVELOPMENT & PROFESSIONAL DEVELOPMENT



Vision Brainstorm Data

This is the brainstorm data that was the result of the first round of vision discussions. It represents the ideas of all participants. The brainstorm data is an important link to what people were thinking about as they discussed each of these vision clusters. Some ideas are specific, others are more general. They all help us imagine the future five years from now. The title heading indicates the consensus of the group.

EVERY TRIBE HAS BUILDING BLOCKS & BLUE PRINTS IN PLACE TO ENGINEER THEIR OWN ECONOMIC PROSPERITY

- Pilot cross agency cooperation for agriculture and natural resource business
- Every nation has at least 1 health/wellness center
- Required STEDC participation in state Planning processes
- Every Tribe has U.C.C. in place
- Contingency plans for worst case financial scenarios

PROACTIVE GENERATED DATA THAT IS REPRESENTATIVE, TIMELY & USEFUL AND MODELS – SUPPORTS DECISION MAKING EVALUATION

- Annual aggregate data report
- Housing budget for all tribes increase by 100% *after aggregate data
- Transport budget for all tribes increase by 100% *after aggregate data
- HHS budget for all tribes increase by 100% *after aggregate data
- Aggregate data sets re: economic indicators
- Quantify funding from/thru state to tribe
- Catalog of state grant funds available to tribes
- Identify Careers people can be trained in that allows remote employment

VIBRANT PROGRAMS & POLICIES THAT CONTINUALLY EVOLVE & SUPPORT LOCAL ECONOMIC INDEPENDENCE & INNOVATION

- Make ICED funding a permanent part of state budget
- State tax incentives & policies
- Access to capital policies
- ICED budget is \$2.5 m/yr
- Indian equity fund sustainability
- Revolve income in tribal economies at least 3-4 times through local, individually owned critical businesses (goods & services)



PROACTIVE, COMPREHENSIVE, VISIBLE CAPACITY TO EMPOWER NATIVE PEOPLE

- Small business incubators on every Tribe's Mainstreet
- Each tribe has a desk with a direct line to communicate with other tribes
- STEDC program expansion 1. Capitol program 2. Housing program 3. Technical assistance program
- Develop non-tribal partnerships (home ownership, youth, prevention/AA)
- Tribal tourism events eligible for tourism dollars
- Annual or bi-annual convening of best practices & tribes to IA
- Establish two Tribal consortiums to produce and market goods/commodities
- Media capacity to communicate & educate
- Enrolled membership in Tribes need to develop many non-profits within that community
- Every nation has formed a Community Development Corporation
- Locate one corporate partner on every reservation to create local jobs
- Have full time dedicated business technical assistance in each Indian community

BRIDGE FOR EXTERNAL RESOURCES & OPPORTUNITIES TO EMPOWER GRASSROOTS DEVELOPMENT & PROFESSIONAL DEVELOPMENT

- Mandatory training & information sharing of elected freshman State & Tribal officials
- Strategically train for local market demand; mentor
- Overseas trade mission after domestic trade mission comes to MT
- Continuation of best practices Conference
- STEDC scholarship fund – private, nonprofit, corporate donors – for all tribes
- 1st Cobell Entrepreneur competition for 7th graders through College





Underlying Contradictions

The focus of the Underlying Contradictions workshop is analysis. The underlying contradictions workshop asks the question:

***What are the issues and obstacles
which block progress towards
our economic development vision?***

Honest dialogue is required for this clear-headed analysis of the Commission's issues. The group's analysis of contradictions is at the heart of this workshop. Participants grappled with the issues and obstacles blocking the MT STEDC economic Vision and determined that there were five underlying contradictions. These are shown in the swirl on the next page moving from the most disruptive at the center to the least disruptive.

Underlying Contradictions Data

Complexity of Economic Development Clouds & Overwhelms Leadership's Preparedness to Make Decisions

- Co-dependence on Government
- Dysfunction within leadership & employees is familiar & manageable
- Paternalism by tribal leadership doesn't give room to grow
- Status quo limits creativity
- Uncoordinated small business education & technical assistance
- Inconsistent leadership training
- Conflicting priorities
- Reluctant support from state elected leadership
- Individual vs. team thinking



Communication is Sporadic, Reactive & Limits Capacity to Build Collaboration & Respond to Economic Development

- Insecurity fuels unwillingness to communicate
- Misperception by leadership of solutions or new, different modified ways
- Inflexible, unreasonable bias
- Disjointed collaboration
- Conflicting communication style

Partially Developed Infrastructure & Fragmented Funding & Resources Are Inadequate to Foster Economic Development

- Shrinking unpredictable funding of Native American economic development programs
- Fragmentation of funding streams
- Neglected infrastructure that would allow economic development to occur
- Disproportionate financial investments

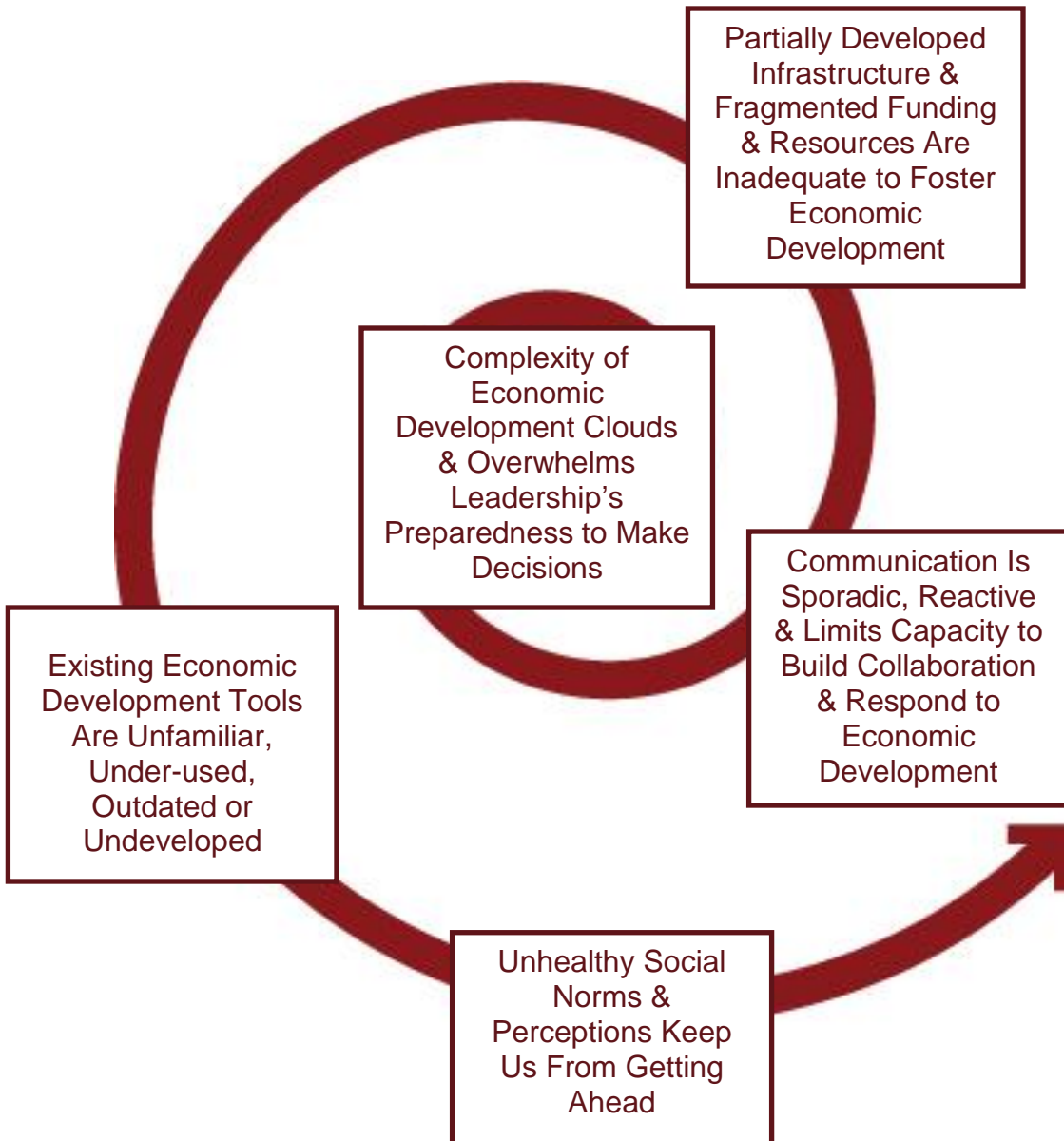
Existing Economic Development Tools Are Unfamiliar, Under-used, Outdated or Undeveloped

- Outdated tribal policies
- Obsolete, non-measurable info or data and/or data that is devalued complex or disjointed
- Unfamiliarity with tools & resources

Unhealthy Social Norms & Perceptions Keep Us From Getting Ahead

- Fear & pessimism undermines cooperation
- Crab in bucket
- Laziness undermines productivity
- Cultural vs. economic development conflict (Christianity says money=satan)
- "I am dumb & I don't know any better" perception
- Their idea, My idea







Strategies for 2013-15

In this workshop participants developed potential actions that could be taken over the next two years to launch the MT STED Commission's Vision. The group then wove those action elements into strategies. The group brainstormed actions that launch vision activities and actions that address the contradictions. The strategies then came together through group dialogue and consensus on the intent of each strategy implied by the data within the various groupings of effort.

Strategic Directions Brainstorm Data and Teams

In the brainstorm for the strategic directions is the core information to launch the implementation phase of this work. Although every item listed may not be prioritized for completion this information provides a look at the pending priorities and potential action which will ultimately be decided by the teams of people who work on each strategy. In addition to the strategy teams, it will be important for each Commissioner to look through the strategies and determine how these strategies inform the work of their respective Tribes and programs.

Purposefully Developing Pathways for Successful Engineering of Economic Prosperity

- Utilize STEDC Strategic Plan
- Distill/ Recap STEDC Purpose
- Diversify Initiatives for Consortium (STEDC)
- Formalize Economic Blueprint & Communicate it to Membership



Developing & Mobilizing Mutually Beneficial Partnerships

- Develop, identify, summarize and share economic development tools
- Help Montana American Indian Caucus and State Tribal Relations Committee champion STEDC efforts and programs
- Coordinate with non-tribal and/or private sector
- Support Native TA providers through \$ and organization
- Network TA to develop best practices (especially in lending)

Communicating Facts & Information Targeted to the Listener

- Scheduled meetings regarding economic development with Council and Staff
- Encourage increasing ICED funding
- Feed media visual success (Include leaders) to share
- Engage partners more / differently / consistently
- Articulate Need to State for STEDC fundings
- Mobilize STED Commission members to inform and educate State leaders on importance of more ICED \$\$

Inventory Current \$ Products, Identifying Gaps & Informing Indian Country on How to Access Them

- Develop baseline of funding needs, with evidence to back it up
- Identify \$ to support current & future STEDC objectives
- Review current State loan products
- Encourage loan participation program
- Analyze State funds to Tribes

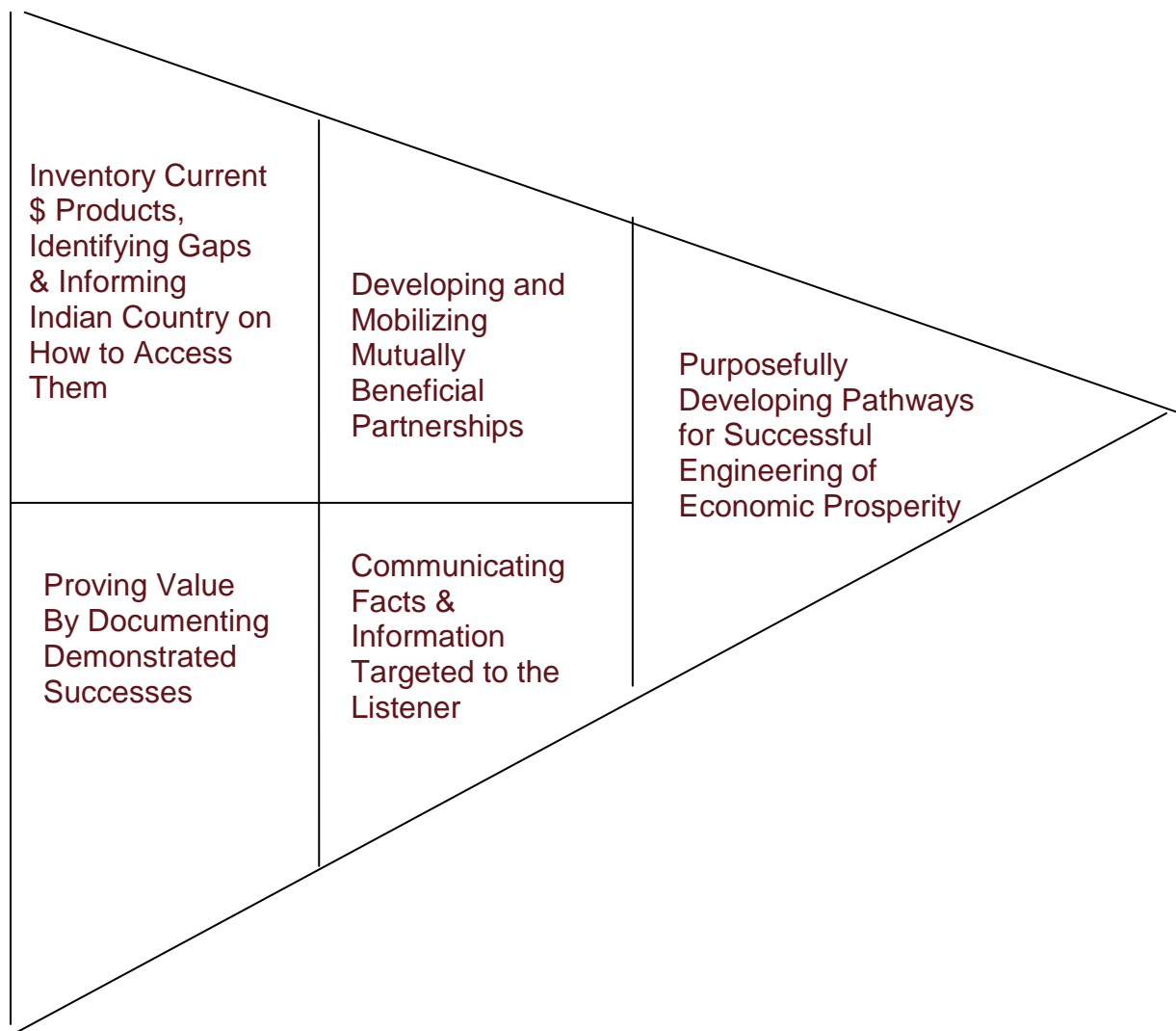
Proving Value By Documenting Demonstrated Successes

- Document success with previous investments (Indian language preservation pilot program)
- Prepare & distribute data on Indian Country economic contributions to Montana
- Demonstrate results (IEF \$'s) to legislature
- Develop data so decision makers can defend / support programs
- Assist in finishing monetary contributions update



Strategic Opportunities

The group was asked to review the two year strategies and determine what the arrangement of the strategies would be if one particular strategy would be at the forefront of creating new opportunities, momentum or involvement in the overall work to achieve the vision of the group. The group acknowledged that ALL of the strategies are significant in the effort to move ahead and arrived at the following arrangement of two year strategies:



Critical Next Steps

The group reviewed the Two Year strategies and identified the critical next steps required to set strategic planning implementation into motion. The following list indicates the primary efforts the participants collectively agreed to focus on immediately following the MT State Tribal Economic Development Commission's strategic planning session in Browning, MT.

1. Inform own governments and staff of this plan & get them on board
 - Bring missing STEDC members up to speed
2. Begin to gather, analyze & interpret data on funding:
 - a. Current Need
 - b. Current Want
 - c. Past Investments
 - d. Past Results
 - e. Past Approach
3. Share & educate our own and others on information we already have
4. Identify critical partners and allies to pursue relationships & engage:
 - Begin with TA Providers: Claim them & continue to support them & their work



Participant List

October 9-11, 2013

MT State Tribal Economic Development Commission 5 Year Strategic Planning Session

Attendees:

Clancy Sivertsen	1 st Vice Chairman Little Shell Tribe
Gerald Grey	Chairman, Little Shell Tribe
Roger Running Crane	Secretary, Blackfeet Tribe
Cheryl Reevis	Planning Director, Blackfeet Tribe
Terry Pitls	Confederated Salish Kootenai Tribal Council
Andy Poole	Montana Department of Commerce
Richard Sawgrey	Chief of Staff Chippewa Cree Tribe
Liz Ching	Business Specialist, Governor's Office Economic Development
Jason Smith	Governor's Office on Indian Affairs
Shawn Real Bird	Crow Tribe
Heather Sobrepena-George	Program Manager, Indian Country Economic Development

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