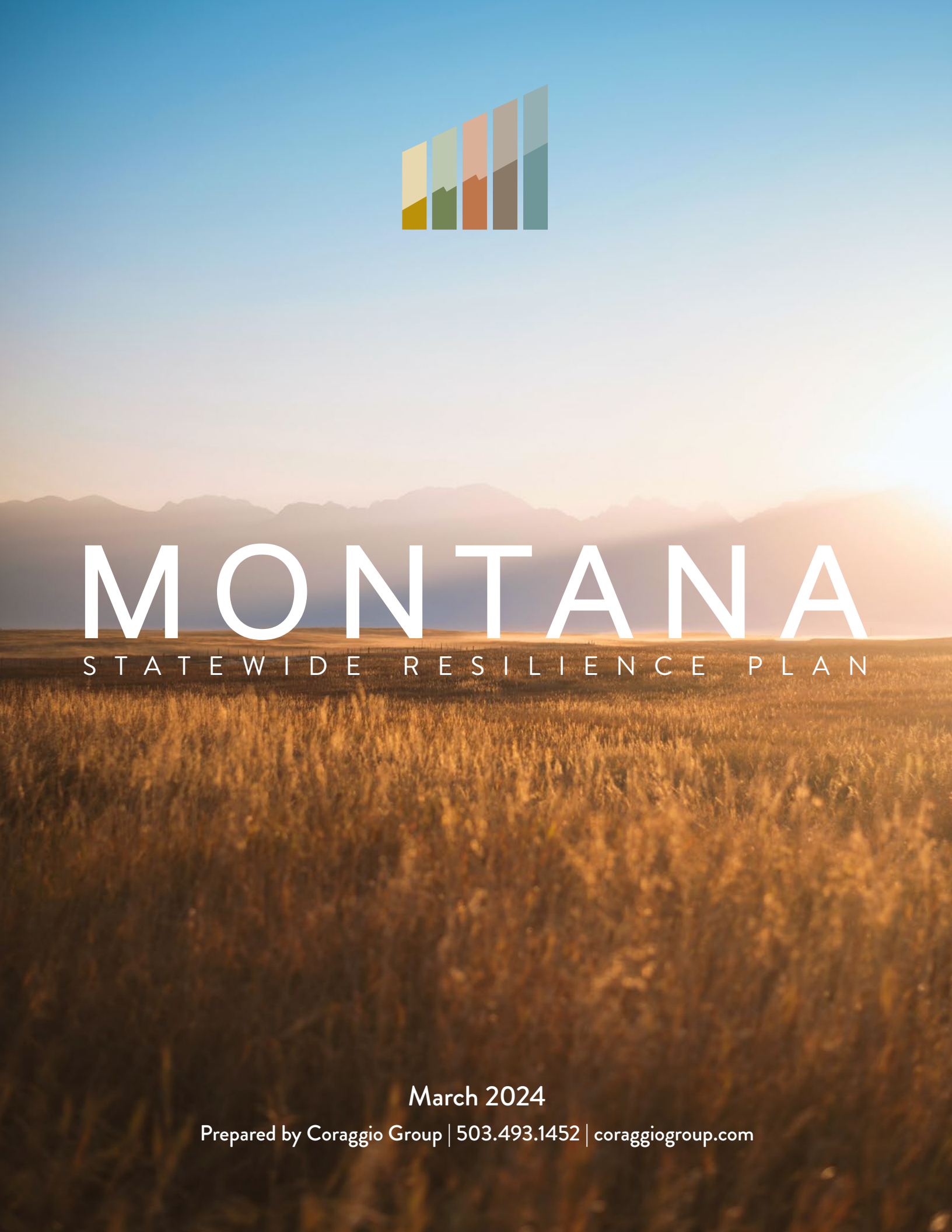


MONTANA

STATEWIDE RESILIENCE PLAN

March 2024

Prepared by Coraggio Group | 503.493.1452 | coraggiogroup.com

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1 EXECUTIVE SUMMARY

Mountains, rivers, prairies, wildlife, glaciers, and spirit of the West are all part of what makes Montana a world-class destination for residents and visitors alike.

The visitor economy has been a key factor in Montana's economic recovery following the COVID-19 pandemic. Visitors have contributed $5.15 billion in local spending, directly supporting $4.42 billion of economic activity in the state, and indirectly supporting another $3.14 billion. Despite the robust tourism sector, Montana businesses and residents have felt the impacts of the pandemic, flooding, fires, and other natural disasters. To bolster the state and continue its vitality in the face of future disruptions, diverse stakeholders have come together to develop a plan that flexibly and collaboratively creates a roadmap to strengthen the resilience of its economies.

Destination MT, the tourism division of the Department of Commerce, facilitated an opportunity for each of Montana's six tourism regions – Yellowstone Country Tourism, Glacier Country Tourism, Southeast Montana Tourism, Missouri River Country Tourism, Central Montana Tourism, and Southwest Montana Tourism – to come together over the summer months of 2023 and craft a plan in partnership with Tribal nations, economic development organizations, federal agencies, state parks, higher education, and other community partners. The regional plans, as well as the state plan detailed here, outline a blueprint for addressing the multifaceted challenges that impact community prosperity. The work outlined in this plan affects the communities who contribute to the state's vibrancy. The state and regional resilience plans work together to protect and support community strength and growth, while working to protect wild spaces and the Montana way of life.

In forwarding a new vision for Montana, this resilience plan identifies the hard work ahead in proactively building positive social, economic, and environmental outcomes that support local businesses and residents.

2 RESILIENCE PLANNING PILLARS

When evaluating destination resilience, we examine the magnitude of risk and degree to which the destination ecosystem is vulnerable to a wide variety of internal and external disruption scenarios. A destination's resilience is assessed as a measure of its collective capacity. To anticipate disruptions before they happen, understand the wide variety of likely impacts upon the broader destination ecosystem and effectively respond to disruptions in real time – rebound and adapt strategically to a post-disruption environment.

Insights from Coraggio's Resilience Assessment identify specific opportunities for destinations to proactively prioritize strategic initiatives that reduce vulnerability to disruption, thereby improving community and organizational preparedness and providing for greater balance in tourism's positive impact.

The assessment includes more than 100 questions that gauge a variety of measures of resilience capacity across seven pillars of destination management, including but not limited to:

Leadership: trust, vision, communication, delegation and power sharing, risk tolerance and mitigation, influencer engagement, and collaboration among entities involved in tourism governance

Team and Talent: organizational culture and values, team engagement, innovation, capacity, bench strength, workforce sufficiency, and skills

Stakeholders and Community: diversity and variety of partners, types and depth of collaboration, stakeholder awareness, stakeholder sentiment, stakeholder engagement, and level of support

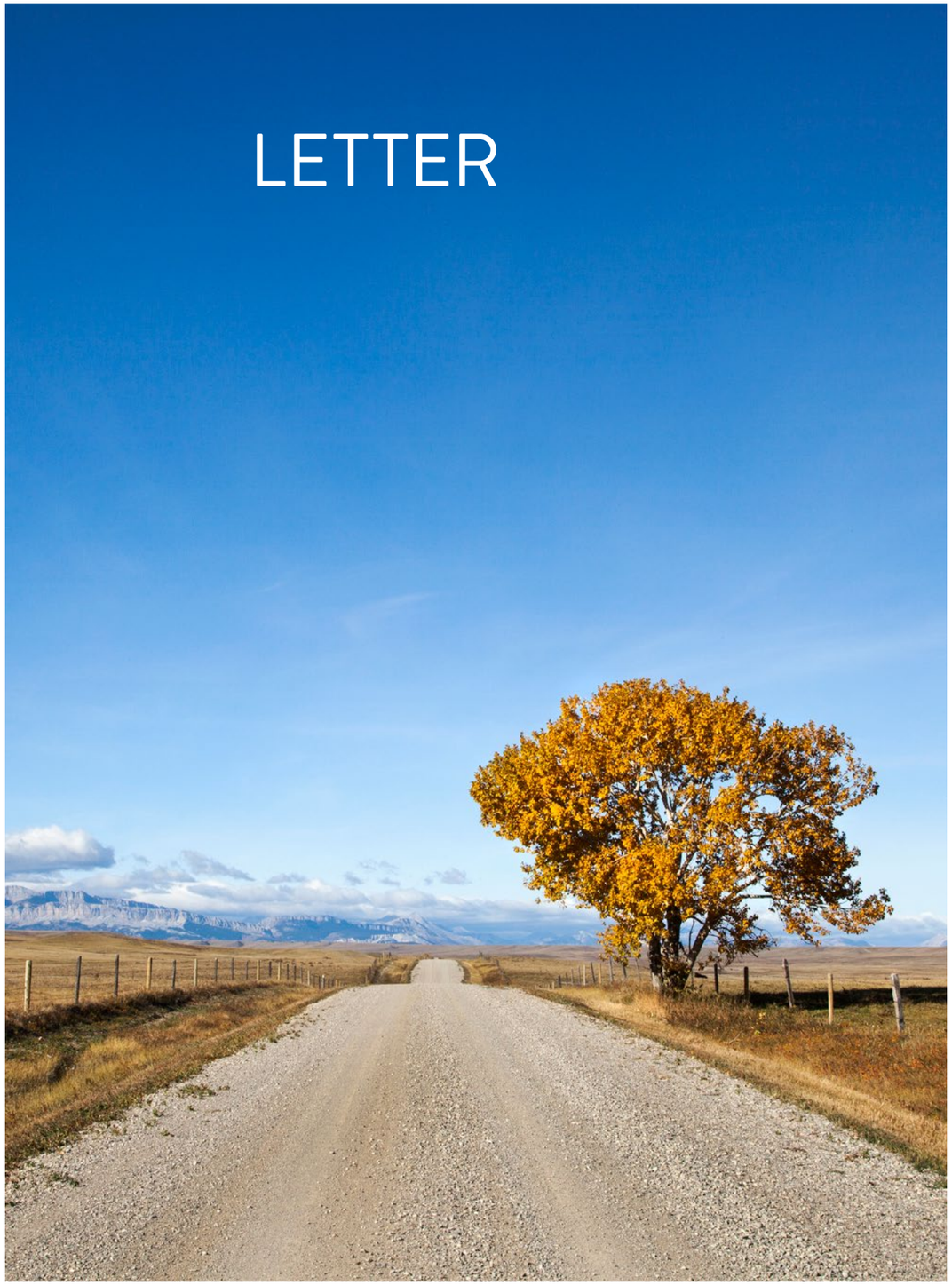
Visitors: audience demographic diversification, geographic origin markets, activities and experiences of interest, visitor management capabilities and systems, visitor research and data collection, visitor sentiment, and access & accessibility to key experiences

Infrastructure and Assets: infrastructure (transportation, communication, energy, management systems, technology, etc.), environmental impact, asset connectivity, accessibility, maintenance, community amenities, and natural resources

Marketing & Communications: diversification of channels, campaign/program risk tolerance, marketing/communications budget flexibility, crisis readiness, brand consistency across geographies and at times of change, and relatability to a variety of audiences

Funding: diversification of funding sources, flexibility of funding allocation, versatility of funding structures, and scope/limitations of funding utilization

LETTER



Dear Partners,

Destination MT, a division of the Montana Department of Commerce, in collaboration with numerous diverse stakeholders and the consulting services of Coraggio Group are pleased to present this Tourism Resilience Plan. Resilience in local tourism and broader economies has become an increasing priority in the wake of several uncontrollable or unforeseeable events in recent history that have caused significant economic volatility, including the COVID-19 pandemic, devastating floods, and wildfires.

Since the COVID-19 pandemic, it is clear how much tourism contributes to the state economy. It has also become evident how devastating it can be to local economies when tourism suddenly declines – or on the flipside – suddenly and drastically increases at a rate that outpaces resources. Through the planning process we examined the need for balance and dispersal of tourism pressure, while also identifying opportunity for responsible growth in new areas, the interconnectivity of tourism and other sectors, and proactive management across the board.

This document outlines how this process came about, who was involved, and the goals we, as a state and as a group of diverse invested stakeholders, set out to achieve.

We would like to take this opportunity to thank all who participated in this planning process. From listening sessions to interviews to surveys, all input has been invaluable and informative to the creation of these imperatives. This process has been a great celebration of the unfettered commitment Montanans have to their communities. We look forward to implementing this plan and shaping the future of a resilient Montana with you.

Thank you all for your great support and partnership.

4 PROCESS & METHODOLOGY

Situation Assessment and Research Activities

This Resilience Plan includes data collection and stakeholder engagement efforts conducted by Coraggio Group on behalf of the Montana Department of Commerce, Destination MT division. The purpose of this effort was to gather insights on the current state of Montana's tourism industry, identify current and emerging opportunities and challenges facing the state as a destination, and provide a set of recommendations to improve destination resilience in Montana.

This plan and its recommendations – alongside each of Montana's six tourism regions' tourism resilience plans – provides a starting point for the implementation of Montana's statewide resilience plan.

The following research and data analysis was performed and is included in the data collection efforts:

- Reviewed and analyzed the available industry, visitor, and tourism economic impact data provided by Destination MT and Montana's six tourism regions, as well as data available online.
- Reviewed existing strategic plans, master plans, and development initiatives from other tourism-adjacent organizations, city and municipal departments, and transportation authorities, with a focus on those pertaining to tourism, economic development, outdoor recreation and conservation, and infrastructure.
- Administered a Destination Resilience Assessment to highlight resilience gaps for action within Montana's visitor economy.

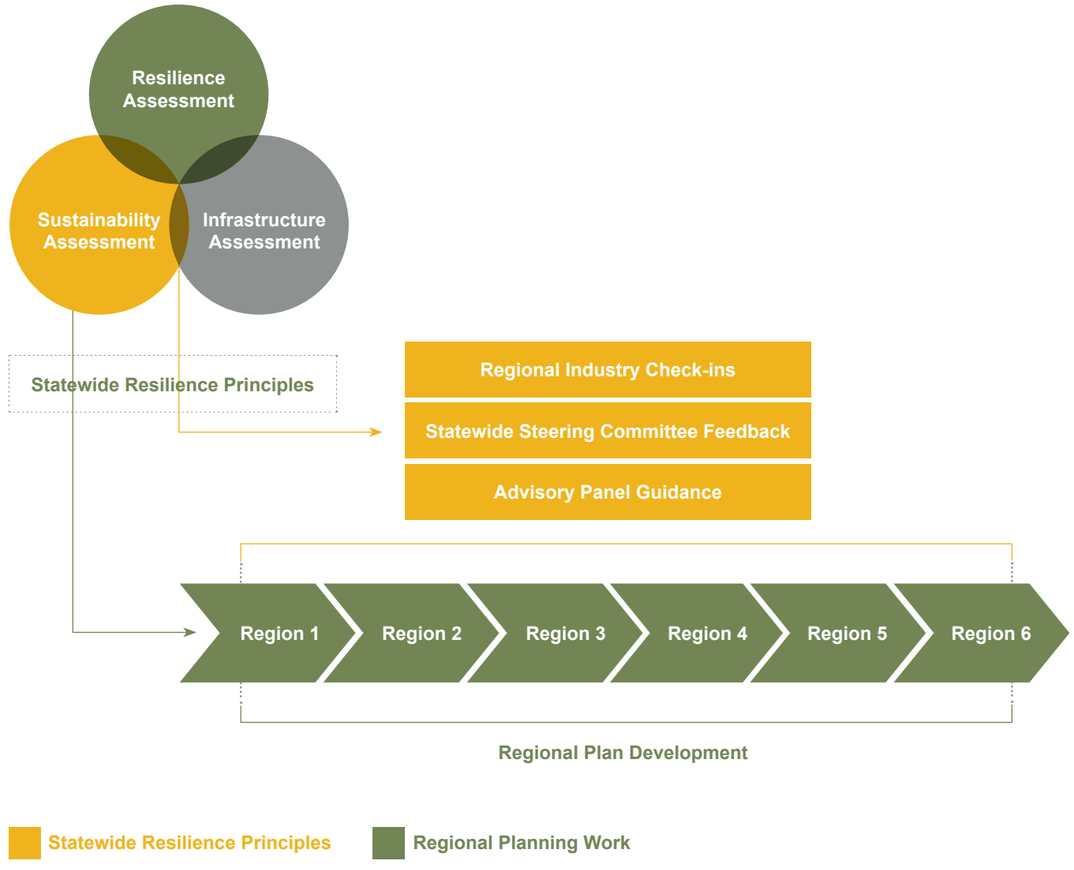
- Administered a visitor profile survey to understand the demographics and motivations of visitors to Montana and its six constituent tourism regions. (DA Visitor Profile)
- Administered a resident sentiment survey to understand resident attitudes toward tourism and the industry's impact on their quality of life. (DA Resident Sentiment)
- Analyzed mobile device geolocation data to understand visitor dispersion among the state's tourism regions, counties, attractions, parks, and airports. (DA Mobile Device Geolocation Dashboard)
- Conducted an Asset and Infrastructure Assessment to inform destination resilience opportunities. (CoP Assessment and Inventory)
- Conducted the Global Sustainable Tourism Council (GSTC) Assessment for each of Montana's tourism regions to identify risk areas and opportunities for greater destination sustainability.
- Gathered stakeholder opinions and perspectives via focus groups and interviews.

Coraggio began this work by facilitating an initial immersion session with Destination MT, followed by conducting external research and review of documents and data provided by Destination MT, each tourism region's leadership, and the local CVBs and DMOs within the state. Coraggio partnered with Destination Analysts for the Visitor Profile Survey, Resident Sentiment Survey, and Mobile Device Geolocation Data, with Clarity of Place for the Asset and Infrastructure Assessment, and with the the Global Sustainable Tourism Council for the GSTC Assessment.

Summary of Stakeholder Engagement Activities and Numbers

- Regional Focus Groups **24**
- Interviews with Statewide and Regional Tourism Stakeholders **41**
- Destination Resilience Assessment Survey Responses **30** *at the state level*, **40** *at the regional level*
- Tourism Stakeholder Survey Responses **312**
- Regional Planning Session participants **73**
- Online survey participants **2,196**

Regional Planning Process



Statewide Plan Development

Statewide Planning informed by Region Plans

Organizational Effectiveness Needs Informed by Region Needs

Plan Management, Implementation, and Reporting

Collective Impact

RESULTS

Statewide Planning Session Timeline

Spring - Summer 2023

Regional planning takes place to inform remaining statewide planning

10/3/23

Industry Advisory Share-Out and Feedback

Statewide Initial Vision Session May 2023

Statewide Steering Committee Session Research Share-Out and Grounding **9/28/23** 3hr virtual

Statewide Steering Committee Session 2 Vision, Collective Roles and Hard Truths **10/23/23**

Statewide Steering Committee Session 3 Destination Resilience Imperatives & Objectives **12/4/23** 3hr virtual

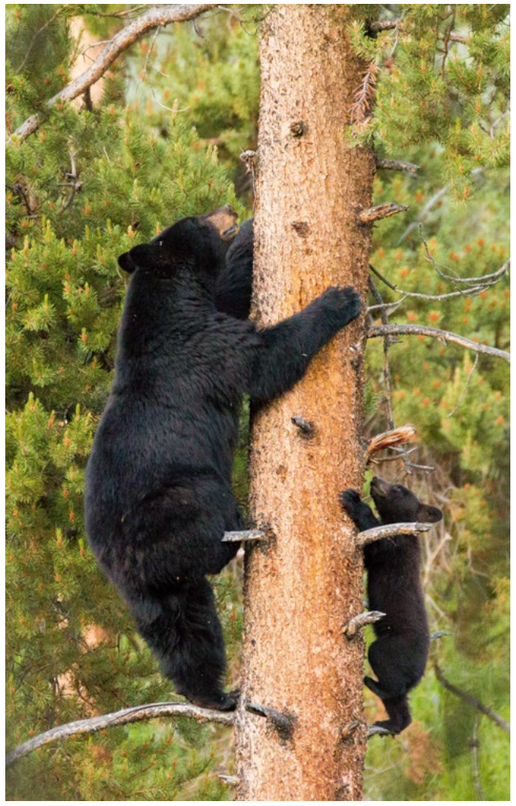
Statewide Steering Committee Sessions 4 & 5 Strategic Initiatives **12/4/23** 3hr virtual

Statewide Steering Committee Session 6 Priorities, Partners, and Phasing **12/18/23** 3hr virtual

Plan Finalization 2/16/24 90min virtual











5 MATRIX & INITIATIVES

Each Resilience Plan Imperative addresses the areas of focus within the seven Resilience Pillars:

IMPERATIVES	FOCUS	RESILIENCE PILLARS
IMPERATIVE 1 Responsibly Position Montana for Prosperity	We promote the pursuit of economic prosperity that is held in balance with the needs and best interests of local heritage and culture, community quality of life, and the natural environment.	
IMPERATIVE 2 Optimize Support Programs and Resources	We must leverage existing resources more effectively and efficiently, while also developing new programs and resources in response to evolving circumstances.	
IMPERATIVE 3 Invest in Local Infrastructure	We must continue to maintain and expand our assets and build an environment to meet the needs of the people who rely on them.	
IMPERATIVE 4 Bolster and Diversify Stakeholder Collaboration and Engagement	We must work together more frequently, more effectively, and more inclusively.	
IMPERATIVE 5 Align Efforts Statewide to Improve Resilience	We must become more efficient and intentional in connecting and uplifting our collective talents and resources at all levels throughout the state.	

RESILIENCE PILLARS Leadership · Team and Talent · Stakeholders and Community · Visitors · Infrastructure and Assets · Marketing and Communication · Funding



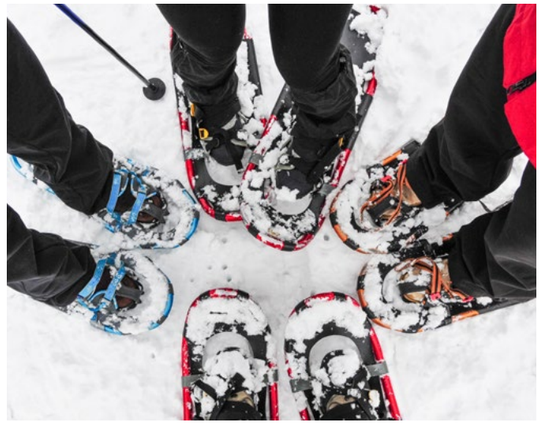

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RED LODGE
CAFE
POLLARD
GRIZZLY PEAK







6 PLAN

IMPERATIVE 1

Responsibly Position Montana for Prosperity

We promote the pursuit of economic prosperity that is held in balance with the needs and best interests of local heritage and culture, community quality of life, and the natural environment.



Objectives

- Increased positive resident sentiment toward tourism
- Increased percentage of jobs with livable wages and benefits
- Revenue growth in target sectors by region

5-Year Initiatives	Community Partners*
1.1 Implement a statewide communication plan regarding resilience plan and resources This Initiative will activate an ongoing communication plan to increase Montana residents awareness of the availability and impact of resilience programs.	Chambers of Commerce, Montana Economic Developers Association, post-secondary education system partners, Regional Convention and Visitor's Bureaus, Tribal partners/nations
1.2 Expand awareness of rural community development planning resources and programs This Initiative will provide increased access to rural development planning and resources to promote rural community prosperity.	Community MT, U.S. Economic Development Administration, Federal Emergency Management Agency, post-secondary education system partners, USDA Rural Development
1.3 Partner with local, regional, federal, Tribal, and other statewide community economic development agencies to support local business outreach, resources, and services Collaboration with economic development and community partners will help increase support for business development and diversification.	Chambers of Commerce, Montana Department of Commerce, Economic Development Districts, Local Development organizations, U.S. Economic Development Administration, Montana Certified Regional Development Corporations, post-secondary education system partners, Small Business Development Center, State Tribal Economic Development Commission, USDA Rural Development
1.4 Utilize sustainable and regenerative educational marketing and messaging Utilizing existing responsible recreation messaging will help support an aligned vision for regenerative tourism and economic prosperity.	Chambers of Commerce, post-secondary education system partners, Voices of Montana Tourism

* suggested but not limited to the following partners

IMPERATIVE 2

Optimize Support Programs and Resources

We must leverage existing resources more effectively and efficiently, while also developing new programs and resources in response to evolving circumstances.



Objectives

- Increase availability of affordable housing within targeted areas
- Increase the percent of Montanans with access to affordable and quality childcare
- Increase Montana worker retention rates

5-Year Initiatives	Community Partners*
2.1 Invest in research and analysis to identify opportunities for more flexible and improved access to funding sources Data regarding the barriers that organizations face when seeking funding will help create a plan to provide needed support to local entities navigating the government funding process.	Accelerate MT, Chamber of Commerce, U.S. Economic Development Administration; Montana Bankers Association, Montana Department of Labor and Industry, Small Business Development Center, USDA Rural Development
2.2 Implement a workforce program to reskill/ cross-train current Montana workers for necessary current and future positions This Initiative will engage universities, Tribal colleges, and trade schools to connect and optimize workforce training and support career path opportunities.	Montana Department of Labor and Industry, Montana State University “Year-to-Career” Education Design Lab, Montana State University Career & Technical Student organizations, Montana Tech Hub

10-Year Initiatives	Community Partners*
2.3 Promote best practices to smooth seasonal fluctuations for a more sustainable year-round workforce Building on workforce data, this Initiative will enact a strategy to inform and train businesses on retention of Montana workers.	Montana Department of Labor and Industry, private sector large employers, staffing agencies
2.4 Connect and expand access to worker childcare programs and affordable housing programs across the state Partnering with public and private organizations provide childcare services and funding will help connect workforce outreach to available childcare supports.	Montana Department of Public Health and Human Services, Montana Chamber of Commerce, Montana Childcare Connections, USDA Rural Development, Zero to Five
2.5 Expand programming and job training to retain workers and campaigns to attract workers to Montana This Initiative builds on earlier efforts to create workforce programming by expanding successful efforts and reinvesting in collaborative efforts to reach new workers while reinforcing efforts that support existing Montana workers.	Montana Department of Commerce, Montana Ambassadors, Montana Chamber Foundation, Montana Department of Labor and Industry, Montana Office of Public Instruction, Montana State University “Year-to-Career” Education Design Lab, Montana State University Reimagining Rural

* suggested but not limited to the following partners

IMPERATIVE 3

Invest in Local Infrastructure

We must continue to maintain and expand our assets and built environment to meet the needs of the people who rely on them.



Objectives

- Increased percentage of communities with in-progress or implemented infrastructure projects
- Increased number of businesses within targeted sectors
- Increased quality rating of existing assets and infrastructure

5-Year Initiatives	Community Partners*
3.1 Map statewide opportunities for business attraction, expansion, and diversification Smart business investment begins with a comprehensive understanding of assets and opportunities in communities of all sizes across the state.	Community Technical Assistance Program, U.S. Economic Development Administration, Economic Development Districts, Governor's Office of Economic Development, Montana Association of Chamber Executives, Montana Infrastructure Coalition, Montana Department of Commerce, USDA Rural Development
3.2 Establish and maintain a structure and process to prioritize gaps and needs for infrastructure investment To provide for equitable and strategic infrastructure investment, a structured method should be created to identify needs and gaps, prioritize projects, and evaluate priorities on a regular basis. This may be accomplished through an inter-agency coordinating council.	Montana Department of Commerce, Community Technical Assistance Program, U.S. Economic Development Administration, Economic Development Districts, Governor's Office, Montana Department of Transportation, U.S. Department of Agriculture Rural Development
3.3 Align infrastructure investment priorities with local officials, private partners, and other state agencies Once infrastructure improvement opportunities have been mapped out, the state will coordinate with local officials, private partners, and other state agencies to determine the top priorities and needs, particularly for large, cross-state projects requiring significant collaboration (i.e. Hiawatha rail project). A particular focus may be placed on transportation improvements.	Community Technical Assistance Program, U.S. Economic Development Administration, Economic Development Districts, Montana League of Cities and Towns, Montana Lodging and Hospitality Association, Tourism Matters, Montana Department of Transportation Rail Authority, USDA Rural Development
3.4 Study, identify, and implement anti-displacement tools and strategies for urban businesses and residents In addition to support for rural communities, the resilience plan addresses growth and development in urban communities in order to maintain the quality of life and economic opportunities in Montana's cities.	City councils, local legislators, Montana Department of Commerce, Tribal colleges, Tribal culture committees

* suggested but not limited to the following partners

5-Year Initiatives	Community Partners*
3.5 Form a policy study group to identify and recommend funding opportunities for infrastructure improvements This policy study group will be charged with making recommendations in several improvement verticals, including building repair/maintenance, transportation (with an emphasis on multi-community public transit), and bicycle and pedestrian infrastructure.	Montana League of Cities and Towns, Montana Infrastructure Coalition, Montana Chamber of Commerce
3.6 Promote stronger local/community collaboration with regional airports and related ground transportation services to increase point-to-point connectivity throughout the state Increasing community participation and coordination with regional air and ground transportation will benefit local residents, increase access for visitors, and expand the economic benefits of tourism for Montana.	Airports, Montana League of Cities and Towns, community air service committees, Montana Department of Commerce, Montana Department of Transportation



10-Year Initiatives	Community Partners*
3.7 Build roadmap and funding pathways to improve access to water/sewer infrastructure and high-speed internet for rural communities, small businesses, and low-income residents To provide for continued access to funding for critical infrastructure programs in rural communities, the Initiative team will address barriers to funding access and improve funding availability for targeted community projects.	Broadband MT, Connect MT, U.S. Economic Development Administration, USDA Rural Development
3.8 Advance stable and strategic alternative energy development This Initiative seeks to promote strategic alternative energy development through efforts such as increasing incentives, streamlining the process for alternative energy projects that improve the energy supply, and identifying the ideal footprint for renewable energy infrastructure (i.e., the location of EV charging stations to maximize economic impact).	Montana Department of Environmental Quality, U.S. Economic Development Administration, Northwestern Energy, Navajo Transitional Energy Company, U.S. Department of Energy Clean Energy to Communities Program Montana Electric Cooperatives Association
3.9 Improve crisis response by connecting state and local response plans This Initiative seeks to create a seamless and highly efficient crisis response by evaluating, improving, and connecting local and regional crisis response plans to the state. This may include alerting DES of the existence of Resilience Plans and incorporating DES as a partner or owner of this effort.	Montana Department of Commerce, Montana Disaster & Emergency Services
3.10 Collaborate with relevant agencies for improved cellular tower coverage Elevating cellular tower access in rural Montana is a key benefit for residents and visitors to increase safety and connectivity in the state.	Montana Telecommunications Access Program

* suggested but not limited to the following partners

IMPERATIVE 4

Bolster and Diversify Stakeholder Collaboration and Engagement

We must work together more frequently, more effectively, and more inclusively.



Objectives

- Increased stakeholder participation in community development projects
- Increased participation in Initiatives led by Tribal communities
- Increased stakeholder awareness of destination resilience improvements

5-Year Initiatives	Community Partners*
4.1 Establish and sustain an inclusive structure for the management and implementation of the Statewide Resilience Plan that recognizes Tribal sovereignty This Statewide Resilience Plan will require the work and input of many agencies and organizations. To be effective, an advisory body must be established. This body must then determine its working structure (decision-making processes, member composition, terms, accountability plans, and rules of engagement). A particular focus will be promoting Tribal involvement and building a body that includes diverse representation from around the state.	Department of Commerce, U.S. Economic Development Administration, State Tribal Economic Development Commission, U.S. Department of Agriculture Rural Development
4.2 Define and executive an ongoing method to engage stakeholders and connect them to relevant community development projects A common challenge in community development is a gap in awareness between the programs and those who would benefit from them. This Initiative seeks to close the information gap and boost participation/utilization of these programs. Potential approaches may include the creation of a Resilience Manager or Coordinator oversight body/ committee, an information exchange plan, gathering best practices, and more.	Certified Regional Development Corporations and Economic Development Districts, Chambers of Commerce, Montana Department of Commerce, Tourism Regions & CVBs, U.S. Economic Development Administration, Montana Lodging and Hospitality Association, USDA Rural Development, Voices of Montana Tourism
4.3 Expand funding access and utilization in rural areas and Tribal communities beyond traditional tourism businesses A resilient tourism industry and economy relies on a diverse set of businesses, particularly in rural areas. This Initiative seeks to increase access to and utilization of funding to businesses that bolster the resilience of the economy but may not have been considered under previous tourism funding programs. This may include a readiness assessment to better identify what is in place already and where more help is needed.	Montana Department of Commerce, U.S. Economic Development Administration, Native American Business Advisors, Native Community Development agencies, Regional Certified Economic Development Corporations, State Tribal Economic Development Commission, U.S. Department of Agriculture Rural Development

* suggested but not limited to the following partners

IMPERATIVE 5

Align Efforts Statewide to Improve Resilience

We must become more efficient and intentional in connecting and uplifting our collective talents and resources at all levels throughout the state.



Objectives

- Increased number of community plans in active implementation across the state
- Completion of Statewide Resilience Plan Objectives
- Increased frequency of and engagement with statewide communications regarding resilience resources and progress

5-Year Initiatives	Community Partners*
5.1 Formalize the state's Regional Resilience Plan implementation support strategy This Initiative seeks to establish clear processes to facilitiate plan implementation such as standard operating procedures, succession planning during leadership/ administration changes, and leveraging existing advisory bodies such as the Tourism Advisory Council and regional economic advisory boards.	Chambers of Commerce, Certified Regional Development Corporations, Montana Department of Commerce, Montana Economic Developers Association, Montana Lodging and Hospitality Association, Tourism Advisory Council
5.2 Build and execute a collaborative State/Regional communication and engagement plan To promote consistent and cohesive messages concerning the Statewide and Regional Resilience Plans, the state will coordinate with the regions to build a communication and engagement plan that optimizes the frequency and content of communications with regional stakeholders and partners, emphasizes the stakeholder's role within the state economy, amplifies success stories, and reports on the progress and impact of the seven integrated plans.	Montana Department of Commerce, U.S. Department of Agriculture Rural Development
5.3 Develop community growth plans that promote preservation of local culture and heritage and encourage input from Tribal leadership, Tribal Elders, and Knowledge Keepers Culture and heritage are specific to local areas and vary across the state. By collaborating with regional governments, Tribes, residents, and other local leaders, the resilience plan can better support community growth plans.	Center for Indian Country Development, Governors' Office of Indian Affairs, Native American Development Corporation, State Tribal Economic Development Commission, U.S. Department of Agriculture Rural Development
5.4 Promote the long-term effectiveness and relevance of the Statewide Resilience Plan through funding criteria and accountability measures This Initiative provides for a plan that has the state's and other resources behind it and that all funded projects are aligned with the plan. Projects funded with state dollars should demonstrate a connection to the Resilience Plan through a set of pre-determined criteria. The state may also leverage additional resources and policy to support plan implementation, maintain accountability, and support ongoing reviews and renewals of efforts at the local, regional, and statewide levels.	Montana Department of Commerce, USDA Rural Development

* suggested but not limited to the following partners

7 ACKNOWLEDGEMENTS

Planning Committee

- **Allison Corbyn,** Montana Economic Developers Association
- **Stuart Doggett,** Montana Lodging and Hospitality Association
- **Pat Doyle,** Montana Fish, Wildlife and Parks
- **Lauren Eichenfels,** Montana Department of Transportation
- **Andy Fjeseth,** Montana Department of Agriculture
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- **Galen Steffens,** Montana Department of Commerce, Community MT
- **Candace Carr Strauss,** Montana Chamber of Commerce
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- **Tash Wisemiller,** U.S. Department of Agriculture, Rural Development

Regional Leads

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- **James Cooler,** Central Montana Tourism
- **Racene Friede,** Glacier Country Tourism
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- **Carla Hunsley,** Missouri River Country Tourism
- **Brenda Maas,** Southeast Montana Tourism






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