

2010 ECONOMIC IMPACT REPORT

The Five Tribes
of
Idaho



Tribal Contacts

Coeur d'Alene Tribe

Marc Stewart, Public Relations Director
208.686.2023 (office)
208.582.3891 (cell)
mstewart@cdatribe-nsn.gov

Kootenai Tribe

Chairwoman Jennifer Porter's Office
142 County Rd 38A
Bonners Ferry, ID 83805
208.267.3519
Jennifer@kootenai.org
wbarquin@kootenai.org

Nez Perce Tribe

Ann McCormack, Economic Development Planner
PO Box 365
Lapwai, ID 83540
208.843.3710
annm@nezperce.org

Shoshone-Bannock Tribes

Laverne Beech, Public Relations Manager
PO Box 306
Ft. Hall, ID 83203
208.589.8595
Lbeech@sbtribes.com

Shoshone-Paiute Tribes

Lisa G. Jim
208.759.3100
208.871.7067 (cell)
Jim.lisa@shopai.org

Credits

**Report prepared by Steven Peterson, Economist
(According to the best available data for 2009)**

Graphic Designer: Jayson FiveCrows

Map Design: Laurie Ames, Remote Sensing Specialist

Editors: Julie Kane, Managing Attorney

Darren Williams, Legal Counsel Staff

Economic Impacts of the Five Tribes of Idaho On Idaho's Economy

A recent analysis of Idaho's five Indian reservations shows that Idaho tribes are among the top ten employers with a combined payroll of approximately 3,961 jobs. When employment opportunities created by the various tribal governmental, enterprise, and contracting activities is included, total direct jobs increase to 6,258.

Overall, the tribes added approximately \$877.9 million in the economic activity to the state's economy in 2009, and generated \$24.7 million in state and local tax revenues (*including the multiplier effects*).

"The study confirms what tribal planners already know- the tribes are rapidly growing, significant economic engines in the state," said Steven Peterson, a leading regional economist.



TABLE OF CONTENTS

- 1 The Chairman and Chairperson of the Five Tribes
- 2 Letter from the Chairmen and Chairperson
- 3 2010 Economic Impacts of the Five Tribes of Idaho Report
by Steven Peterson
- 7 Map of the Reservations of Idaho

Tribal Activities

- 8 Coeur d'Alene Tribe
- 10 Kootenai Tribe
- 12 Nez Perce Tribe
- 14 Shoshone-Bannock Tribes
- 16 Shoshone Paiute Tribes



Chief Allan, Coeur d'Alene Tribe

Chief Allan is establishing a legacy of economic opportunities for tribal members on the reservation through aggressive expansion, diversification and partnerships with businesses and elected officials on the local, state and national level.



Jennifer Porter, Kootenai Tribe

As the second chairwoman of the Kootenai Tribe, Jennifer Porter emphasizes the need to educate their children so they become informed, productive adults ready to lead their people. Chairwoman Porter believes that she is the spokesperson for her tribe who relies on her council because they are the decision makers that assist her in the important matters of the tribe.



McCoy Oatman, Nez Perce Tribe

Chairman Oatman represents the Nez Perce Tribe at all top level inter-governmental meetings and provides solid leadership to a busy tribal council. McCoy grew up in a family that emphasizes tribal tradition and culture. He brings that perspective to every issue that may arise.



Chief Nathan Small, Shoshone-Bannock Tribes

Chairman Small has served on the seven-member Fort Hall Business Council for a total of five years. In June, he was elected as chairman; prior to that, he served as vice chairman. Chairman Small was instrumental in opening the Shoshone-Bannock Tribes' first gaming operation and served as gaming manager from 1980 to 1990.



Chief Robert Bear, Shoshone-Paiute Tribes

Robert C. Bear is Chairman of the Shoshone-Paiute Tribes. He is a veteran of the United States Army, having served in Operation Desert Storm. Bear looks to the wisdom of the elders while leading the Tribes in a modern world.



Message from the Five Tribes of Idaho

On behalf of our constituents, as the elected leaders of the Five Tribes of Idaho, we are pleased to present the first collective summary of the Economic Impacts of the Five Tribes of Idaho, on Idaho's Economy, for FY 2009.

This report is the outcome of an extensive process, and as such, many people have helped shape the findings and recommendations. We are especially grateful to Steven Peterson, Research Economist and Instructor from the Department of Business and Economics at the University of Idaho as the principal investigator. This study also compliments regional economic impact analyses for the Coeur d'Alene Tribe, Kootenai Tribe, Nez Perce Tribe, Shoshone-Bannock Tribes, and the Shoshone-Paiute Tribes. Peterson compiled data from each individual comprehensive study to form the collective highlights of the major findings presented here.

This summary has been published as part of the five tribes' commitment to fostering business creation, expansion, and job growth. The tribes have a long history of working with their respective regional communities and other governments. The common interests and goals shared by local, tribal, state, and federal governments can best be served through cooperation and communication. By working together, we can ensure the agreements made between our forefathers are honored.

Respectfully,

Chief Allan, Coeur d'Alene Tribe

Chairperson Jennifer Porter, Kootenai Tribe

Chairman McCoy Oatman, Nez Perce Tribe

Chief Nathan Small, Shoshone-Bannock Tribes

Chief Robert Bear, Shoshone-Paiute Tribes

Economic Impacts of the Five Tribes of Idaho on Idaho's Economy

Introduction

This report summarizes the results of a study, “The Economic Impacts of the Five Tribes of Idaho on Idaho’s Economy”. It was jointly sponsored by the Five Tribes of Idaho in 2010. The study’s principal investigator is Steven Peterson, Research Economist and Instructor, Department of Business, University of Idaho, who has more than 20 years experience in regional economic modeling. This study also compliments regional economic impact analyses for the Coeur d’Alene Tribe, Kootenai Tribe, Nez Perce Tribe, Shoshone-Bannock Tribes, and Shoshone Paiute Tribes. While a similar collective study of the five tribes’ economies was conducted in 2002, this is the first ever economic impact study with the full participation of Idaho’s five tribes.

Highlights

- The five tribes of Idaho have increased total employment statewide to 10,676 jobs including the multiplier effects (i.e. the direct, indirect and induced impacts).
- Total sales from tribal economic activity exceed \$878 million annually including the multiplier effects.
- The five tribes of Idaho have raised gross state product (value-added) by \$493 million dollars, on average, which represents nearly 1 percent of the gross state product.
- New tourist traffic to tribal casinos is estimated at more than 500,000 people per year. An estimated 50 percent are from out of state, representing new dollars to the state economy.

Tribal Status, Jurisdictions, and Economic Regions

Native American tribes in the United States such as the individual Idaho Tribes have a unique status. They are classified as sovereign nations, but in terms of jurisdictions, they most closely resemble state or local government entities. They have their own tribal governments, health and education services, police

forces, economic development projects, cultural and social functions, and other important regulatory activities. Consequently, tribes have significant economic and social impacts on their tribal reservations and the regions surrounding those reservations.

Sources and Uses of Tribal Revenues

There is a variety of funding sources and uses of revenues for Idaho’s Native American Tribes, as shown in Figure 1. The sources include:

Sources and Uses of Tribal Funds	
Sources of Tribal Funds	Uses of Tribal Funds
A Federal Government Grants, Contracts, Settlements	A Tribal Government
B Tribal Enterprises	B Human Resource Development Wellness Centers Schools Job Training Cultural Enhancement Higher Education Scholarships
C Gaming	C Economic Development Tribal Enterprises Industrial Parks Community Infrastructure
	D NonTribal Community Involvement Funding to Local School Districts Community Infrastructure Development Industrial Parks
	E Planning for the Future Endowment Accounts Long-Term Development

Figure 1

Federal Revenues: Tribes receive federal government revenues to support tribal government operations, health services, education, fish and wildlife projects, law enforcement, environmental quality, economic development programs and projects, and other activities. U.S. federal agencies serving as funding sources include the Bureau of Indian Affairs, U.S. Fish and Wildlife Service, U.S. Department of Health and Human Services, U.S. Department of Energy, U.S. Department of Agriculture, Bonneville Power Administration, U.S. Environmental Protection Agency, and U.S. Department of Transportation. Those federal funds represent “high powered” spending when they enter the local economies, and provide a relatively large economic impact.

Gaming Revenues: The newest source of revenues for Idaho’s Tribes is from gaming and associated operations. Gaming offers the opportunity for the tribes to become truly self-sufficient and to provide reservation programs and services historically underfunded by the federal government. Several Idaho Tribes have constructed restaurants, motels, retail trade establishments, golf courses and other recreational activities to transform the casinos into tourist resort facilities. Several of these complexes are becoming destination resorts, attracting tourists from other

Economic Impact Report (continued)

parts of the state, region and the world. There are seven tribal gaming facilities in Idaho: 1) Coeur d'Alene Tribe: Coeur d'Alene Casino and Resort (Worley) 2) Kootenai Tribe: Kootenai River Inn and Spa (Bonners Ferry) 3) Nez Perce Tribe: Itse Ye Ye Casino (Kamiah), Clearwater River Casino (Lewiston) 4) The Shoshone-Bannock Tribes: Fort Hall Casino (Fort Hall), Sage Hill Casino (Blackfoot), Bannock Peak (Fort Hall).

Enterprise Revenues: Tribes have many non-gaming enterprises. These enterprises include convenience stores, gas stations, gifts shops, museums, wood products manufacturing, mining, farming, ranching, construction, and other industries.

Geography and Economic Regions

The U.S. Department of Commerce's Bureau of Economic Analysis divides the State of Idaho into three integrated economic regions. Those regions are:

- The Boise Region, comprised of eastern Oregon, northwestern Nevada, and southwestern and central Idaho.
- The Spokane Region, comprised of eastern Washington, northern Idaho, southwestern Canada, and part of western Montana.
- The Salt Lake City Region, comprised of northern Utah, northeastern Nevada, and southeastern Idaho.

As described above and shown in Figure 2, political jurisdictions rarely coincide with the integrated economic regions that focus on market centers.

The Nez Perce Reservation encompasses parts of Clearwater, Idaho, Latah, Lewis, and Nez Perce counties. The Nez Perce Tribe

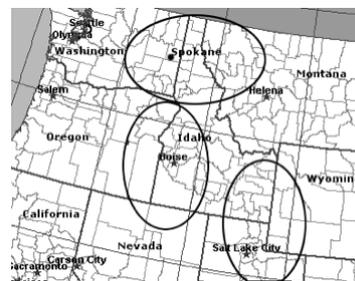


Figure 2

and tribal members own about 113,129 acres in these north-central counties. Most of the reservation operational centers are located along highway U.S. 12 east of Lewiston, with the tribal headquarters located in Lapwai.

The Kootenai Tribal presence is concentrated in Boundary County and, as the county's name implies, it borders on Canada. The Kootenai Tribe's land holdings contain 2,902 acres, with the tribal headquarters located in Bonners Ferry.

The Coeur d'Alene Reservation includes portions of Benewah and Kootenai Counties. The tribe and tribal members own 69,299 acres, with the tribal headquarters in Plummer. The reservation stretches from the Palouse region in north central Idaho north to the Coeur d'Alene and St. Joe rivers.

Because these tribal lands are located in northern Idaho, the Kootenai, Coeur d'Alene and Nez Perce Tribes' economic effects are measured in the Spokane, Washington regional economic area. The net result of this concentration of tribal lands in northern Idaho is that the tribes have a significant economic impact on the north-Idaho regional economy.

The Shoshone-Bannock Tribe occupies the Fort Hall Indian Reservation, which is located in the eastern-Idaho counties of Bannock, Bingham, Power, and Caribou. The reservation spans 544,000 acres, with the tribe headquartered in Fort Hall. The Shoshone-Bannock Tribe's economic activities appear as a portion of the Salt Lake City economic market area.

The Shoshone-Paiute Tribes occupy the Duck Valley Reservation, and its economic activity appears in the Boise, Idaho economic region. The Duck Valley Reservation is located in Owyhee County, Idaho, and Humboldt County, Nevada and has about 289,819 acres.

In total, the Five Tribes of Idaho own over 1,019,149 million acres in Idaho and have 9,604 members in the state and 13,311 total. If compared with Idaho's total 44 counties, the Five Tribes of Idaho would be ranked 20th place in terms of land area.

Economic Impact Report (continued)

Key Findings: Direct Economic Effects:

Total direct tribal government revenues from all tribes, located in Idaho, was approximately \$202.4 million for 2009. Tribal enterprise revenues and revenues from all other sources were \$479.6 million. In total, direct revenues were \$682 million for 2009. These numbers represent the actual spending of all tribal operations.

Direct tribal employment is the sum of the total employees of the Five Tribes of Idaho. The tribal governments employ approximately 1,519 workers. The casinos and related operations employ 1,712 workers; tribal enterprises-134 workers; housing operations-89 workers; health clinics-425 workers; and manufacturing-82 workers. In total, the Five Tribes of Idaho directly employ 3,961 employees, collectively making them one of the top 10 employers in Idaho. In addition, the tribes create additional outside direct employment through contracts and related operations, totaling 2,297, which includes construction, agriculture, tourism, Bureau of Indian Affairs (BIA) operations, community-generated employment from the hospitality industry, and service industry employment. In total, the Five Tribes of Idaho are responsible for 6,258 direct employees not including the multiplier effects (i.e. indirect and induced impacts).

The tribal gaming facilities have approximately 3,810 video gaming machines; and 317 available motel rooms. They produced gross gaming revenues of more than \$921 million, pay prizes of \$759 million, and produce net revenues of more than \$162 million for 2009, before costs and operating expenses. Total combined unique tourist-visitors are difficult to estimate, but they likely exceed 500,000 per year. Many patrons visit more than once yearly and total hourly visitor counts may be as high as 12 million annually.

The tribes have over 141,000 acres in cultivation in Idaho (not including grazing and pasture lands) producing direct revenues of \$93.3 million annually.

The tribes donated approximately \$2.6 million to Idaho charities and schools in 2009.

Key Findings: Economic Impacts:

An IMPLAN input/output model was created to estimate

the economic impacts of the Five Tribes on the State of Idaho. IMPLAN is a well-established, widely used economic modeling software. Economic impacts are calculated separately for each of the tribal functional divisions. New monies (i.e. base activities) brought into Idaho from tribal economic activities drive economic impacts. Multipliers are calculated and they determine how the direct change in exports (final demands) of a single tribal industry ripples throughout all the other industries in Idaho.

Summary Economic Impacts Total Tribal Activities Including Multiplier Effects:

When the estimated impacts are aggregated, the sum of all of the direct, indirect, and induced effects in 2009 for all tribal activities are:

- \$877.9 million in sales
- \$493.1 million in value-added
(gross state product)
- \$329.0 million in earnings (payroll)
- \$24.7 million in sales taxes, property taxes, and excise taxes
- 10,676 jobs

If the Five Tribes of Idaho (including the multiplier effects) are compared (by rankings) with the economies of the counties of Idaho, they would rank 23rd out of total 44 Idaho counties in terms of sales; 16th place in terms of total jobs; 17th place in terms of earnings (payroll); and 23rd place in terms of indirect business taxes.

The economic impact of the tribes created approximately \$7.6 million in state income tax payments in 2009 which includes income generated from all tribal economic activities, including the multiplier effects.

Detailed Tribal Economic Impacts

Figure 3 reports the economic impacts derived from the market place activities of the Five Tribes of Idaho by tribal function. The output reported include the changes in sales, value-added, earnings received by employees, employment, and property and sales taxes (indirect business taxes).

Economic Impact Report (continued)

Definitions

Sales: The total transactions in dollars from direct, indirect, and induced tribal economic activity. This is the broadest measure of economic activity and economic impacts.

Value-added (value-output): This is a regional measure of gross domestic product and is a subset of sales. Value-added includes employee compensation (earnings), proprietors' income, other property income, and indirect business taxes. Value added is a measure of economic activity.

Earnings: The wage/salary and proprietors' income to individuals and is a component of value-added.

Jobs: The total full and part-time jobs resulting from tribal economic activity.

Indirect Taxes: All taxes generated from tribal economic activity excluding personal and corporate income taxes. They consist of mostly sales taxes, property taxes, and excise taxes. The indirect taxes include the direct economic activity of tribal operations as well as the taxes paid from the supporting economic activities which are estimated by the economic models (i.e. from the multiplier effects).

Figure 3: The 2009 Economic Impacts of the 5 Tribes of Idaho
Including the Direct, Indirect, and Induced impacts (i.e. Multiplier Effects)

Tribal Operation	Sales	Value-Added	Wages/Salaries	Employment	Taxes
Government					
Central Government	\$ 96,608,090	\$ 74,908,735	\$ 60,615,279	1,532	\$ 1,329,331
Other Government	\$ 25,463,682	\$ 19,744,229	\$ 15,976,801	404	\$ 350,381
Environmental Management	\$ 64,805,824	\$ 38,658,465	\$ 21,828,181	738	\$ 1,294,769
Public Health and Welfare	\$ 25,450,485	\$ 16,455,707	\$ 12,609,948	317	\$ 429,625
Education	\$ 20,524,574	\$ 9,607,255	\$ 5,901,826	210	\$ 531,931
Public Works/Economic Development	\$ 13,165,790	\$ 7,755,554	\$ 6,011,613	153	\$ 205,293
Public Safety	\$ 14,955,860	\$ 11,596,591	\$ 9,383,827	237	\$ 205,793
Community Services	\$ 5,629,791	\$ 2,635,224	\$ 1,618,842	57	\$ 145,906
Capital Outlay/Investment	\$ 32,876,763	\$ 14,982,752	\$ 10,737,721	280	\$ 655,703
Total	\$ 299,480,858	\$ 196,344,512	\$ 144,684,039	3,927	\$ 5,148,731
Enterprises					
Casino	\$ 137,358,018	\$ 71,893,561	\$ 49,272,453	1,990	\$ 4,262,272
Housing	\$ 9,859,117	\$ 4,885,729	\$ 3,270,626	144	\$ 306,864
Retail Trade	\$ 27,904,290	\$ 17,514,561	\$ 10,754,865	364	\$ 1,809,660
Motels/Food/Drink	\$ 37,848,137	\$ 18,129,366	\$ 11,689,364	557	\$ 1,227,158
Medical Clinics	\$ 80,151,185	\$ 47,732,000	\$ 35,520,348	884	\$ 1,452,155
Bureau of Indian Affairs	\$ 14,674,991	\$ 11,662,327	\$ 8,805,997	144	\$ 191,751
Culture and Recreation	\$ 10,044,139	\$ 5,560,431	\$ 3,836,124	174	\$ 393,127
Tourism	\$ 68,249,726	\$ 35,883,862	\$ 22,900,793	968	\$ 4,499,798
Manufacturing	\$ 50,713,080	\$ 18,472,998	\$ 12,640,534	252	\$ 1,111,251
Agriculture	\$ 141,681,096	\$ 65,062,420	\$ 25,582,512	1,273	\$ 4,245,457
Total Enterprises	\$ 578,483,777	\$ 296,797,256	\$ 184,273,614	6,749	\$ 19,499,493
Total Tribal Economic Impacts	\$ 877,964,636	\$ 493,141,767	\$ 328,957,653	10,676	\$ 24,648,225

Reservations of Idaho

Kootenai Tribe of Idaho
 Land: 2,902 acres
 Tribal Enrollment: 105
 Year Established: 1974/1986

Contact:
www.kootenai.org
 P.O. Box 1269
 Bonners Ferry, ID 83805
 Voice: 208.267.3419
 FAX: 208.267.2960



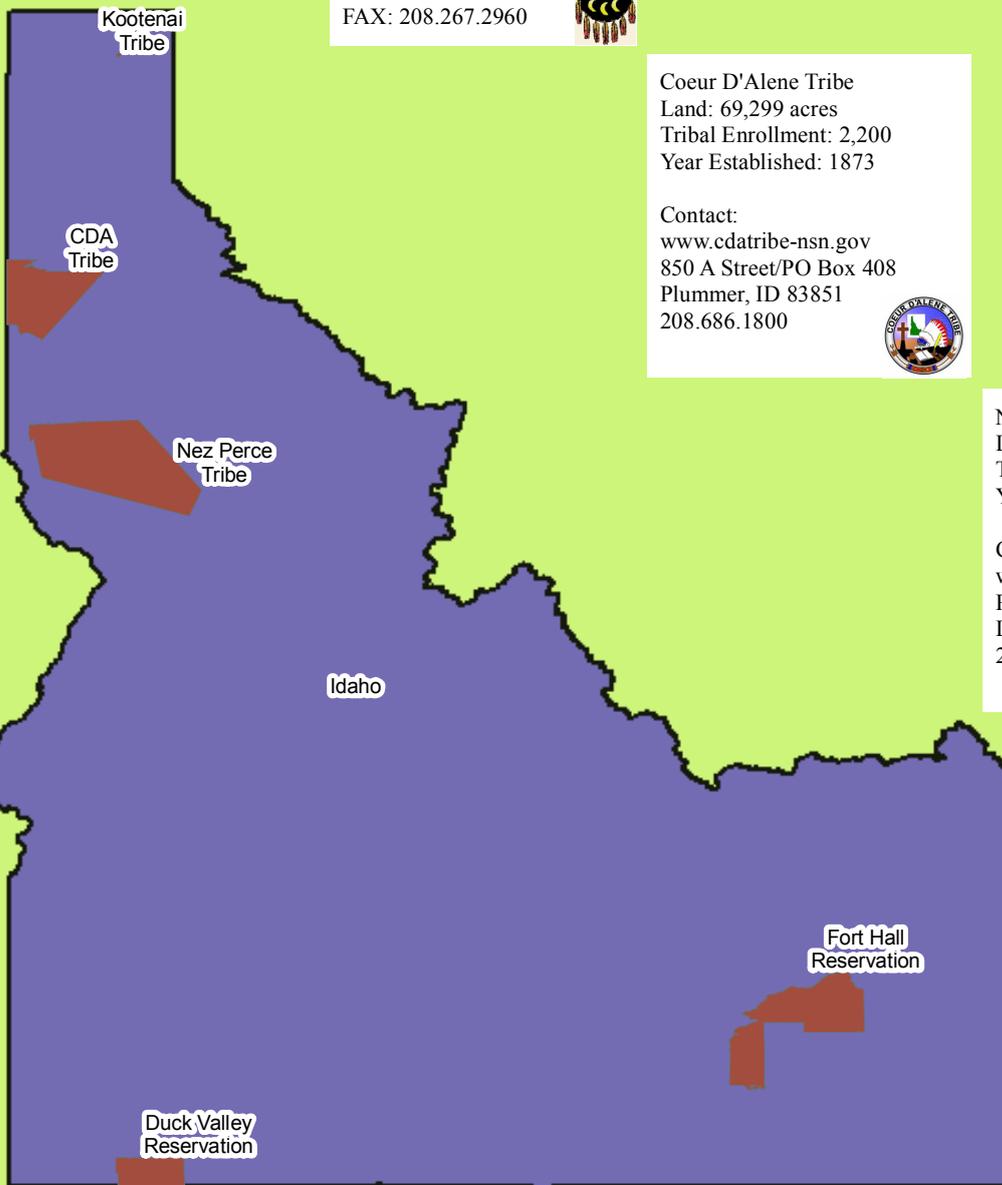
Coeur D'Alene Tribe
 Land: 69,299 acres
 Tribal Enrollment: 2,200
 Year Established: 1873

Contact:
www.cdatribe-nsn.gov
 850 A Street/PO Box 408
 Plummer, ID 83851
 208.686.1800



Nez Perce Tribe
 Land: 113,129 acres
 Tribal Enrollment: 3,513
 Year Established: 1863

Contact:
www.nezperce.org
 PO Box 305
 Lapwai, ID 83540
 208.843.2253



Idaho

Kootenai Tribe

CDA Tribe

Nez Perce Tribe

Fort Hall Reservation

Duck Valley Reservation



Shoshone-Paiute at Duck Valley
 Land: 289,819 acres
 Tribal Enrollment: 2,088
 Year Established: 1877

Contact:
www.shopaitribes.org
 PO Box 219
 Owyhee, NV 89832
 208.759.3100



Shosone-Bannock at Fort Hall
 Land: 544,000 acres
 Tribal Enrollment: 5,400
 Year Established: 1868

Contact:
www.shoshonebannocktribes.com
 PO Box 306
 Ft. Hall, ID 83203
 208.589.8595



Prepared by:



Coeur d'Alene Tribe



The Coeur d'Alene Tribe is the leading employer in northern Idaho with 1,700 people who work in the tribe's government and business operations. The Tribe's economic impact on the state economy is more than \$309 million and the tribe's operations account for more than \$12 million in taxes going to state, county and local agencies.

The tribe's government and business operations create a total of nearly 4,000 jobs in the region.

Expansion and diversification has been the economic philosophy for the Tribe as operations have grown steadily over the last 10 years. Its business enterprises include the Coeur d'Alene Casino Resort Hotel, Circling Raven Golf Course and Echelon (formally doing business as Berg Integrated Systems).

Echelon employs 82 people and fulfills various government contracts with the Department of Defense and other agencies, including making giant fuel bladders and building metal storage containers for the Army.

Giving back to the community has always been part of the tribe's economic portfolio from Day 1. The Coeur d'Alene Tribe donated \$1.8 million toward education in 2009 and continues to donate 5 percent of gaming revenue toward education. Since 1993, the council has donated nearly \$14 million to elementary and high schools across the state. For example, Filer Elementary School in Twin Falls and the Fruitland School District received gifts last year.

Another testament to the Tribe's commitment to giving back is

illustrated by the many relationships with nonprofits. The Coeur d'Alene Tribe has donated hundreds of thousands of dollars to numerous charities, such as the Salvation Army and Coaches vs. Cancer.

Demographics

The Coeur d'Alene Tribe has 2,200 enrolled members, including 1,400 living on the reservation. The Tribe has sovereign authority on the 345,000 acre reservation, which is located in Kootenai and Benewah counties. The geographical features of the reservation include mountains, lakes, timber, and farm land. There are an estimated 8,500 non-tribal members living on the reservation.

Government

The tribal government is ruled by a seven-member council voted on by the people. Each council seat is a three year term and the Chairman



of the council is elected annually by the tribal council. Currently, Chief J. Allan is serving as chairman and Ernie Stensgar is vice chairman.

Jeanie Louie is the tribal secretary. Alfred Nomee, Roberta Juneau Charlotte Nilson and Paulette Jordan are the other council members.



Brief history

The Coeur d'Alenes have lived in northern Idaho since the beginning of life on Earth. Schitsu 'umsh are considered the discovered people or those who were found here. The Coeur d'Alene people lived off the land, streams and lakes for hundreds of generations. Their territory stretched from eastern Washington into the western Montana. The Coeur d'Alene people first encountered white missionaries in the early 1800s in the Silver Valley. President Ulysses Grant recognized the Coeur d'Alene Tribe and established the reservation with executive order in 1873.

Current Projects and future growth

The Coeur d'Alene Tribe is in the midst of a \$75 million expansion of its casino resort hotel. The project is expected to be completed in April 2011. Once the work is finished, the casino will have 200 additional hotel rooms, a luxury spa, steakhouse and other amenities to complement its award-winning Circling Raven Golf Club.

The tribe will start work on a \$17.3 million Benewah Medical Center next spring. The project is being funded by an \$11.8 million federal grant from the Affordable Care Act. The Tribe will pick up the remaining costs. The new facility is expected to open in the fall of 2012. The Benewah Medical Center is one of the only health care centers in the country that serves tribal members and non-tribal members. The BMC has about 8,000 patients, who account for 40,000 visits annually.

The Coeur d'Alene Tribe has been awarded a \$12.3 million grant from the U.S. Department of Agriculture to construct a broadband network that will provide high-speed internet access for the rural communities and the

surrounding areas of the reservation.

Natural Wonders

Coeur d'Alene Lake is located in northern Idaho and is roughly 25 miles long with 109 miles of shoreline. The lake is fed by the Coeur d'Alene and St. Joe rivers. The lake is a popular tourist attraction with recreationists who use the lake year round. During the summer months, people enjoy swimming, fishing and boating activities.

The Trail of the Coeur d'Alenes showcases the natural beauty of the region and draws people from around the world to enjoy walking and bicycling activities. The 73-mile trail stretches from Plummer, Idaho to near the Montana border.

At the trail head in Plummer, there is a new Veterans Memorial that is dedicated to the Coeur d'Alene's warriors and veterans.

The Cataldo Sacred Heart Mission is the oldest building in Idaho and located within the Silver Valley. It was built in the 1840s by the missionaries and the Coeur d'Alenes. Although the mission is not on the reservation, the building holds deep spiritual meaning for the Coeur d'Alene people.

Special Events

Julyamash is the largest outdoor pow wow in the Northwest and tribes from across the country attend it annually. The event is a celebration of Indian culture, featuring dances, games and songs.

The Feast of Assumption is a Catholic ceremony held in late June. The Catholic faith is engrained in the Coeur d'Alene culture.

Water Potato Day is an event held every October and is a cultural celebration of the Coeur d'Alene Tribe. The event includes demonstrations for local elementary school children about the Coeur d'Alenes and how they harvested water potatoes to survive the long winter months.



Kootenai Tribe



The Kootenai Tribe of Idaho is headquartered near Bonners Ferry in northern Idaho's Kootenai River Valley. The Kootenai Nation as a whole consists of seven modern bands, including two in the U.S. – the Kootenai Tribe of Idaho and the Confederated Salish and Kootenai Tribes of the Flathead Reservation – and five in Canada. These bands have inhabited portions of Idaho, Montana, Washington, British Columbia and Alberta since time immemorial, with the Kootenai Tribe of Idaho belonging to a group (the Lower Kootenai group) which historically inhabited the area along the Kootenai River from above Kootenai Falls in Montana to Kootenay Lake in British Columbia.

In 1855, the Kootenai, Salish and Flathead were called to a treaty

session at Hellgate, Montana for the purpose of ceding territory to the U.S. government. The Salish and Upper Kootenai groups entered into the Hellgate Treaty, thereby ceding the majority of the Kootenai Territory and creating a reservation near Flathead Lake for the newly-created confederated Salish and Kootenai Tribes. The Kootenai Tribe of Idaho did not participate in the negotiation or sign the Treaty, but the Treaty-ceded territory included the tribe's aboriginal lands while reserving to the tribe that which was not ceded, namely hunting and gathering rights on open and unclaimed areas and fishing at usual and accustomed fishing areas.

Subsequent to the Treaty, the United States sent Indian agents to the Bonners Ferry area

to discuss the impact of the Treaty on the Idaho band. The Indian agents demanded the Idaho Kootenai leave their homeland in the Kootenai Valley and take allotments on the Flathead Reservation in accordance with the Treaty. Some members of the Idaho band agreed to the United States' demands, while others moved across the international boundary into British Columbia and joined Canadian bands. After additional attempts by the Indian agents to persuade the remainder of the Idaho Kootenai to leave their traditional homelands pursuant to the Treaty, the United States relented. The remaining members of the Kootenai Tribe received allotments along the Kootenai River under Section 4 of the Indian General Allotment Act of 1887, 24 Stat. 388, as amended, 25 U.S.C. § 331 et seq.

Much of the land reserved for the



Idaho Kootenai was lost through “surveying errors” and fraudulent dealings. Additionally, the United States repeatedly failed to uphold the promises made in the Treaty, other agreements and federal law. For example, Kootenai citizens were expected to travel to the Coeur d’Alene agency for health care – a trip most could not make.

On September 20, 1974, following years of loss of their aboriginal lands and chronic poverty, the 67 remaining Kootenais declared war on the United States. Although it was a peaceful war, the publicity got the nation’s attention and at long last the Kootenais were deeded 12.5 acres of land at the old Kootenai Mission and provided housing assistance. In addition, the Tribe was able to access other government dollars for programs such as health, education and welfare. Things took a positive turn for the Tribe.

“(One of my study goals) is to inform the public of the magnitude and value Native American operations have,” said Steven Peterson, Economist.

The tribe took this opportunity to begin rebuilding itself. By 1986, the Kootenai Tribe was the proud owner of the



Kootenai River Inn, a business venture that put the tribe on the road to economic independence and allowed it to focus its formidable energies and determination on keeping the Creator-Spirit’s Covenant to guard and keep the land, and necessarily the species inhabiting that land. The tribe has never lost sight of its original purpose as guardian of the land,

and the Creator-Spirit’s Covenant remains the foundation

upon which all Tribal activities are based.

The tribe also prides itself on its collaborative work with tribal, federal, state, provincial and local governments to achieve mutually beneficial outcomes. The Tribe was instrumental in creating, and is an active participant in, the Kootenai Valley Resource Initiative (KVRI). The KVRI is a collaborative group that includes representatives of the tribe, the City of Bonners Ferry, Boundary County, private citizens and landowners, federal and state agencies, conservationists and business and industry representatives in the Kootenai Valley. The mission of the KVRI is to improve coordination of local, state, federal and Tribal programs to restore and maintain social, cultural, economic and natural resources.

“When gaming came to the tribes, it changed the direction of the tribes in a positive way. We’ve never taken a step backwards. We’ve even seen an improvement in our government to government relationships,” said Ron Abraham, vice chair of the Kootenai Tribe.



The Kootenai Tribe is proud, after so many years of poverty and loss, to be the largest employer in Boundary County. The Tribe’s economic ventures and governmental operations enable the tribe to make significant contributions to regional education, community projects and economic revitalization.



Nez Perce Tribe

The Nez Perce Tribe is a federally recognized sovereign government, as declared in the Treaty of 1855 and subsequent treaties, laws and Acts of Congress. Like all governments, the tribe has profound economic, social and political impacts on the regional economy.

The Nimiipuu people are governed by a nine-member, democratically elected council based on a constitution adopted by the tribe in 1948. The tribal members convene annually to elect members to the council known as the Nez Perce Tribal Executive Committee (NPTEC), for staggered three year terms. The NPTEC is obligated to protect the health and welfare of the Nez Perce people. This means protecting and preserving treaty rights and tribal sovereignty, Nez Perce culture and the general environment of the reservation by actively striving to stimulate new, private and public investments to create employment and growth opportunities.

“Our day-to-day activities are similar to other governments in that we do our best to provide quality services such as health care, law enforcement and social services to the community”, says Rebecca A. Miles, Executive Director of the Nez Perce Tribe.

The Nez Perce Tribe carries out a full range of governmental functions, including government operations, law enforcement and police, education, health care, regulatory functions, economic development, court system, environmental and wildlife protection and restoration, promotion of cultural functions, and promotion of overall well-being of the population.

The current population of enrolled members of the Nez Perce Tribe includes 2,101 living in the state of Idaho, and 3,513 in total. The Tribe is proud to acknowledge that they are one of the top three employers in the region.

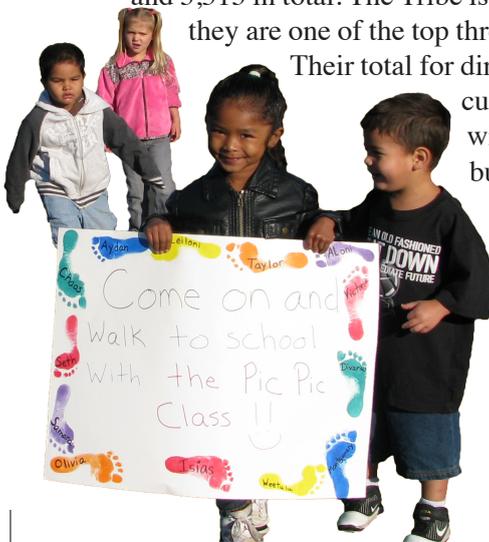
Their total for direct and indirect employees currently stands at 1,230, with principal offices and businesses in Nez Perce, Lewis, and Clearwater Counties. The Nez Perce Housing Authority recently reported figures that reflect the current total for built homes at

278 and 117 rental units. The annual budget for the two Nimiipuu Health Clinic facilities is \$ 9.9 MM. In 2009 the clinics served 3,872 clients and had 61,595 visits through out the year.

The Nez Perce Tribe contributed \$178 million to the local economy in 2009 (as measured by sales including the multiplier effects). The tribe’s contribution to total gross regional product (value-added) was \$108 million, which is approximately 7% of the gross regional product of Nez Perce County.

“The Nez Perce Tribe’s priority is to create and provide jobs, but also to plan for the future by expanding current enterprises and looking into diversifying tribal businesses”, said Jamie Olsen, Enterprises Executive Officer. “We want to coordinate as much as possible with our neighbors and our local business partners.”

The leadership at the Nez Perce Tribal Enterprises (NPTE) envisions attaining prosperity for the Nez Perce Tribe and tribal enterprises through a comprehensive range of profitable businesses. The primary operations of the NPT Enterprise are located at the Aht’ Wy Plaza, four miles east of Lewiston on Highway 12/95, and include the new Clearwater River Casino (CRC) with a gaming floor of over 600 machines. Also offered at CRC is a full-service restaurant with seating for 120, a deli with seating for 50, the lounge serving beer and wine to as many as 30 patrons, and a gift shop. Adjacent to the CRC is the hotel resort that was completed in spring 2007 and the large sprung structure where Bingo and other events, such as concerts, are held. Nearby, the Recreational Vehicle (RV) Park offers 33 shaded parking sites and an outdoor swimming pool. In close proximity is one of the convenience stores owned and operated by the Nez Perce Tribe. The Nez Perce Express, which is open 24 hours, offers fuel, tobacco, grocery items, and daily deli service. The Camas Express, which opened in the fall of 2008, provides similar services and is located on Highway 95 between Winchester and Craigmont, Idaho. Finally, the Its’e ye-ye Casino, located sixty miles east of the CRC, and other governmental operations, in Kamiah, make the Nez Perce Tribe the second largest employer in Lewis County.





At the tribe’s bi-annual general council in September Chairman McCoy Oatman reported, in his address to the membership, that there were multiple major government projects under way including: the wastewater upgrades in Kamiah and Lapwai, the Lapwai project will also lay a new pedestrian walking/bike path from Spalding to Red Duck Lane, a recent land acquisition in the Rapid River area, construction of a long house, and the new Education, Training and Business Development Center next to the Lapwai High School. The tribe has received a \$1.5 MM grant for broadband enhancement for seven counties that extends coverage to the more remote areas on the reservation and beyond. The KIYE FM public radio station development team said the station will be set to begin broadcasting early next year. The long term goals for the station are to have the capacity to conduct local discussions on tribal topics including lessons and stories in the Niimiiputimt language.

NPTE expansion plans include more development on the Camas Express site for the proposed new Camas Express Truck Stop and store. The NPTEC is working with the Idaho State Transportation Department to complete the Memorandum of Understanding, which will be an agreement between the Nez Perce Tribe and the State of Idaho to designate the Camas Express site as an official State of Idaho Rest Area, and designated Traveler’s Oasis location.

Last August, Group West of Seattle was selected as the architectural firm to design the phase 1 expansion of Aht’wy Plaza. The first phase of expansion includes the removal of the existing sprung structure and replacing it with an event/conference center that would be attached to the casino. A new event center/conference center will provide the capacity for the CRC to host conferences, conventions and business meetings. This expansion includes improving the gaming floor and infrastructure to create an even more exceptional guest experience.



Nez Percés consider their tribal homelands to be a desirable place to raise their families. There are hallmark

characteristics of the Niimiipuu way. The Nez Perce are a place-based people who want to live and work among their cultural base and have available, to their children, the chance to learn the values of tribal elders, the Niimiiputimt language and their unique Plateau heritage. The Tribe is proud to call this place home.

These homelands encompass rural small communities, beautiful natural features like the rivers, and mild climate



year round. As part of the tribe’s willingness to go “green” they have instituted a public transportation program reservation wide which links to existing state transportation systems. The tribe’s gaming is a big draw for locals and the outside visitors but there is more. North central Idaho has plenty of recreation like hunting, fishing and gathering roots and berries, golf, arts and culture to name just a few. The goal of the Tribe is to ensure an available labor force with the skills and education necessary to meet employment demands of the 21st century. This area provides excellent possibilities to

prepare life long learners for the job force at a technical school or for advancement in four schools of higher education, all within a fifty mile radius of the reservation. These valuable assets are healthy signs for a good quality of life and a strong economy to continue thriving into the future.

“The spirit of the Nez Perce to trade, barter, partner, and realize “success” indeed, lives on for all today. It is the spirit of determination! “Lilly Kauffman, Enterprises Economic Development Planner

Shoshone-Bannock Tribes

The Shoshone-Bannock Tribes are located on the Fort Hall Reservation in Southeastern Idaho. The tribes consist of mixed bands of Shoshone and Bannock Indians whose aboriginal homelands extend over a five-state region once plentiful with the tribes' food mainstays including salmon, buffalo, wild game, and camas roots. The advent of the Oregon Trail and the passage of thousands of settlers annually through the region in the mid-1800s increased conflicts between the non-Indians and Indians and created pressure to set aside a reservation to ensure the safety of both the Indian bands and the settlers. In 1867, the Fort Hall Reservation was established by executive order and, in 1868, the Fort Bridger Treaty of 1868 affirmed the reservation as a "permanent homeland" for the Shoshone and Bannock peoples. Today, the reservation land base stands at 544,000 acres, with more than 96 percent of the lands remaining in tribal and individual Indian ownership. There are approximately 5,400 tribal members, the majority of whom live on or near the Fort Hall Reservation.

Government

The tribal government operates under a Constitution and Bylaws adopted in 1936, two years after passage of the Indian Reorganization Act (IRA). The act was passed to slow the allowed practice of selling reservation lands to non-Indians and to give tribes more of a say in the

management of their lands and other affairs. The tribes' governing body, the Fort Hall Business Council, consists of seven members, each elected for staggered two-year terms. A primary election is held in March of every year and the top vote getters in the primary run against the incumbents in a general election in May. The officers of the council, including the chairman and vice-chair, are elected annually by secret ballot of the governing body. Council members serve in a full time capacity.

Economic Development

The tribes have experienced rapid growth in recent years, spurred not only by growth of their gaming operations, but also through the expansion of their tribal farming operations. The recent economic impact study of the Shoshone-Bannock Tribes indicates that the tribes' economic activity adds more than 4,000 jobs and \$330 million annually to the eastern Idaho economy. The tribes directly employ 920 people in both their governmental operations and business enterprises, making them the fourth largest employer in southeastern Idaho, which includes the City of Pocatello. An additional 1,475 jobs are created by the tribes through activities such as agriculture, tourism and construction, not including the multiplier. The study also found that the 110,000 acres of agricultural land owned by the tribes and individual Indians on the reservation





produces an estimated \$83.6 million annually in direct crop revenues and results in the creation of 1,072 jobs when the multiplier effects are included. Another surprising statistic uncovered by the study is that approximately 40 percent of visitor traffic to the tribes' three casinos comes from out of state, representing new money to the region that might not otherwise have been captured.

In the last two years alone, the tribes have completed several major projects, including the \$10 million Sage Hill Travel Center and Casino south of Blackfoot and the state-of-the-art \$24 million, 66,000 square foot Justice Center in Fort Hall to house the tribes' courts, law enforcement services and corrections programs under one roof. Other projects just completed are the tax building, records management center and covered festival dance arbor. These projects were underway at the same time as growth had slowed in the regional economy due to the recession, providing needed local construction and trade jobs to both Indian and non-Indian workers.

Future Growth

Following a favorable marketing study last year, the tribes' are moving forward with the phased-in expansion of its flagship gaming operation just off the Fort Hall Interstate-15 exit. Phase one of the expansion will cost \$47 million and will involve the construction of a five-story, 156 room-hotel and 15,000 square foot events center beginning next spring. The hotel will include a gift shop, indoor pool, sauna, exercise room, spa and guest laundry. The event center will include a 156-seat sports grill and 45-seat deli.

The phase one expansion will require teardown of the existing tribal enterprise grocery store, clothing/arts and crafts stores and post office. In November, the tribes broke ground on the site identified for the new \$1.9 million, 6,400 square foot grocery store just west of the current store location with a targeted completion date of April. In the area of renewable



resources, the tribes have been studying winds on the reservation since 2001. In 2010, the tribes entered into partnership with a subsidiary of the Southern Ute Tribe to look into the development of a 160 megawatt (50-80 turbines) wind project on the reservation. Wheatgrass Ridge Wind, LLC, was formed to conduct needed environmental and transmission studies to determine the viability of such a project. The studies are expected to take 3-5 years followed by a 1-2 year construction phase if the tribes decide to proceed with the project.

This year, the tribes also committed \$2.2 million in seed money toward the construction of a full-scale \$25 million Wellness Center and Sport Complex to address the high rates of diabetes and heart disease on the reservation. The center would replace the current gym Timbee Hall on the reservation, which is not handicapped accessible, and would also house the tribes' diabetes and related wellness programs. An environmental assessment is currently being conducted on the planned wellness center site. A steering committee has also been formed to guide the project and to identify potential outside funding sources.

Cultural Protection and Enhancement

The tribal philosophy is that the protection and enhancement of culture is directly tied to the exercise of the tribes' on and off reservation hunting and fishing rights as guaranteed under the Fort Bridger Treaty of 1868. Subsistence hunting and fishing both on and off reservation enables families to pass along the prayers, songs and stories so important to preserving the tribes' identity and life ways. More than 60 tribal employee staff are dedicated to treaty rights protection and enhancement; land, water and air regulation; Superfund cleanup oversight; on and off reservation fisheries enhancement and subsistence fishing, hunting and wood gathering. A tribal elder cultural committee helps to ensure the efforts are in alignment with traditional customs. The tribes also support programs aimed at preserving the Shoshone and Bannock languages, archiving important tribal documents and materials and furthering cultural preservation efforts through traditional education and language classes that begin at the preschool level.

Shoshone-Paiute Tribes

History

Shoshone leader Captain Sam said this would be the ideal location for his people, as it was plentiful with game and fish; there was good farmland and abundant timber. It would be here, along the present-day - The Duck Valley Indian



Reservation, home of the Shoshone-Paiute Tribes straddles the border of Idaho and Nevada, established by Executive Order on April 16, 1877. The Shoshone-Paiute Tribes government was established April 20, 1936.

Demographics

The Shoshone-Paiute Tribes are the largest employer within the boundaries of the Duck Valley Indian Reservation, The tribes receive the majority of their funding from federal grants employing approximately 150 full-time employees and 75-85 seasonal employees, with 17% of the positions being key professional positions within the health care facility. The second largest employer, the Owyhee Combined School, employs approximately 50 individuals. A portion of the tribal membership operates as self-employed farmers and ranchers.

Economic Resources

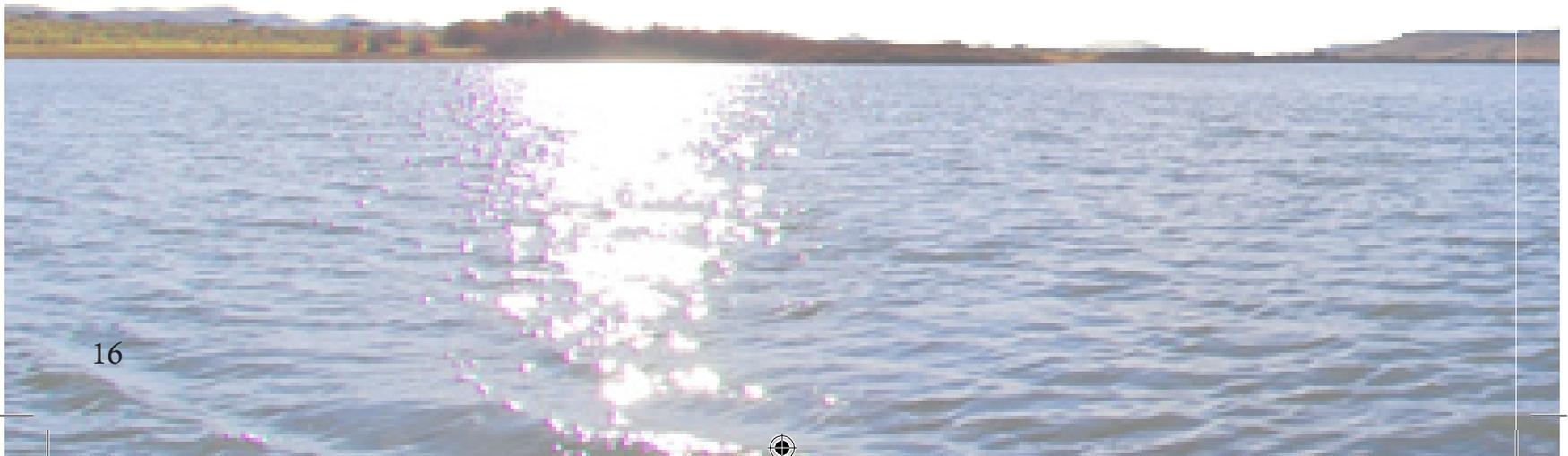
The mainstream of the membership at Duck Valley travels over 100 miles to the vendors in Idaho for the large majority of their daily goods, general services, health care needs, automotive needs, farm and ranching needs, entertainment, etc: contributing to the economic welfare of the State of Idaho.

Cultural Protection and Enhancement

The umbrella of protection encompasses not only cultural sites, but the sovereignty of the Shoshone-Paiute Tribes as well. While the tribes work to ensure a network of resources, by assisting where they can, such as with Wildland and Structural firefighting, and thereby receiving assistance, the tribes share government-to-government relationships with various agencies and have in place with them memorandum of understanding and agreements on jurisdictional and other issues.

Tribal Services

The Shoshone-Paiute Tribes provide overall services to our community; including but not limited to: health care, education assistance, social services, housing, farming and ranching structural needs, etc.





Economic Development

The tribes promote fishing opportunities at their three fishing reservoirs and a stretch of the East Fork Owyhee River in order to generate revenue and to provide employment opportunities to Tribal Members.

A limited number of guided antelope hunts are offered each year to non-tribal members which provides additional income to the Tribes as well as to provide employment to local guides.

In the early 2000's, the Tribes received federal grants to build a grocery store to provide goods to the local community; they opened "Tammen Temeeh Kahnee" (which means "Our Store" in Shoshone) in 2005.

The Tribes participate in Bonneville Power Administration's (BPA) Wildlife Mitigation Program which was developed to mitigate for wildlife habitat lost due to the construction of the Federal Hydropower System. The tribes acquired a 938 acre ranch property in 2009 which they will operate in a manner that protects/enhances fish and wildlife habitat over the long-term.

The tribes also own and operate a Tribal Ranch off reservation which has over 415 cultivated acres and grazing privileges, which also provides revenue to our operations.

Future Growth

The Congress enacted a water settlement with the tribes which will result in construction jobs and income for the rebuilding of an irrigation system, an expanse of productive farm and ranch lands, a stronger fish revenue market and other economic progress.

A wind energy farm has been approved and is at the stage of selecting a proposal. It will result in increased revenue from energy generation, and jobs for upkeep and maintenance.

The expanded and improved airport will make available flight revenue, as well as transportation savings. The tribes are also negotiating a contract to provide resource management for an energy company that will result in substantial increased revenue.



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