

NORTHERN ROCKY MOUNTAIN ECONOMIC DEVELOPMENT DISTRICT



FUTURE BY DESIGN

CREATING ECONOMIC VITALITY



DECEMBER 2012

U.S. Economic Development
Administration, U.S. Department
of Commerce
1401 Constitution Avenue,
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Report is hosted at:
<http://nrmedd.org/>

ACKNOWLEDGEMENTS

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Chapter 1: Introduction

A. Background

Gallatin and Park Counties serve as southwest Montana's economic hub. A variety of high-tech and professional service businesses, a robust tourism industry focused on Yellowstone National Park, and many large working farms and ranches provide an economic base that has become increasingly diverse over the past several decades. Montana State University brings over 14,000 students to the District as well as significant economic and cultural value, and the District's residents are among the most educated in the state.

The Northern Economic Development District (the District) was originally formed in 2002 to facilitate actions to protect, sustain, and advance the economies of Park and Gallatin Counties. The District was rejuvenated in 2011 after a year of dormancy, reforming its board and hiring an executive director in early 2012. The principal task for the NRMEDD during the initial phase of the rejuvenated District has been to populate the Board of Directors with diverse and highly competent individuals representing a broad spectrum of economic sectors, hire an executive director, to produce this Comprehensive Economic Development Strategy (CEDS), and begin immediate implementation of its goals and objectives.

The District's CEDS document is a planning and implementation tool for the communities in the District and replaces the separate Park and Gallatin County CEDs dated 2002 and 2005 respectively. This document will be instrumental in evaluating the success of the District's work. The goal of the CEDS is to guide and coordinate efforts of various public and private entities in economic development and to provide measurable criteria for the work of the District.

In preparing the 2012 CEDS, the objective was to identify the strengths and weaknesses that influence the two-county economy; then build strategies to bolster opportunities and hopefully, begin the work to convert weaknesses into opportunities. The search for all things that mattered to the economy included federal, state and local sources not-with-standing private, nonprofits and arts and culture partners. It was indeed a regional collaboration.

The CEDS process used modern survey instruments, collection of census and other data, and IMPLAN based analysis. It also involved old-fashioned face-to-face meeting in remote town halls and throughout the District's quiet corners. The search for CEDS projects and priorities involved the not only a list of capital improvement projects but also the broader vision of that only comes when economies are dismantled, studied and considered from a variety of angles.

The process engaged peers from development organizations around the State that actually participated in the input process through outside assessment, as well as review of dozens of previous CEDS documents from programs across the nation. The 2012 NRM EDD CEDS document is a unique and tailored document that will guide economic development work across the District for the next five years. The District is greatly indebted to the staff and volunteers who worked tirelessly to prepare this document. Thousands of miles and hundreds of discussion hours, input, and analysis were necessary. To these many, the District remains truly thankful.

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The District's economy today is no longer identified only by businesses up and down its main streets, a few high-tech industries, and a handful of manufacturers. There are new and growing industry sectors and recent major acquisitions. There are also economic influences that lack a typical geographic boundary, global tourists, shared railroads, highways, rivers and economic forces with epicenters hundreds of miles distant. Because business owners and workers in many modern companies can live anywhere they choose, and because Gallatin and Park counties are desirable places to live, there is now a growing and vibrant community of nontraditional economic forces complementing our traditional sectors.

There are a number of organizations in Gallatin and Park counties that, for several years, have been successfully supporting economic development in the region. The District hopes to build on and complement that existing work by structuring complex economic development projects in two significant ways:

1. Building and filling in the gaps of economic development infrastructure – creating cooperation among programs, cooperation among economic assets (MRL, NWE, hospital, airport, MSU, industrial parks, available land, developers, retail centers etc).
2. Serving as the area's entrepreneurial coach for more complex business clients. The District's mission is to provide a team of professionals that quickly ascertains then builds solutions around the weaknesses and strengths of client businesses using its own staff as well as a deep and growing network of professionals that can be efficiently introduced to quickly advance local businesses.

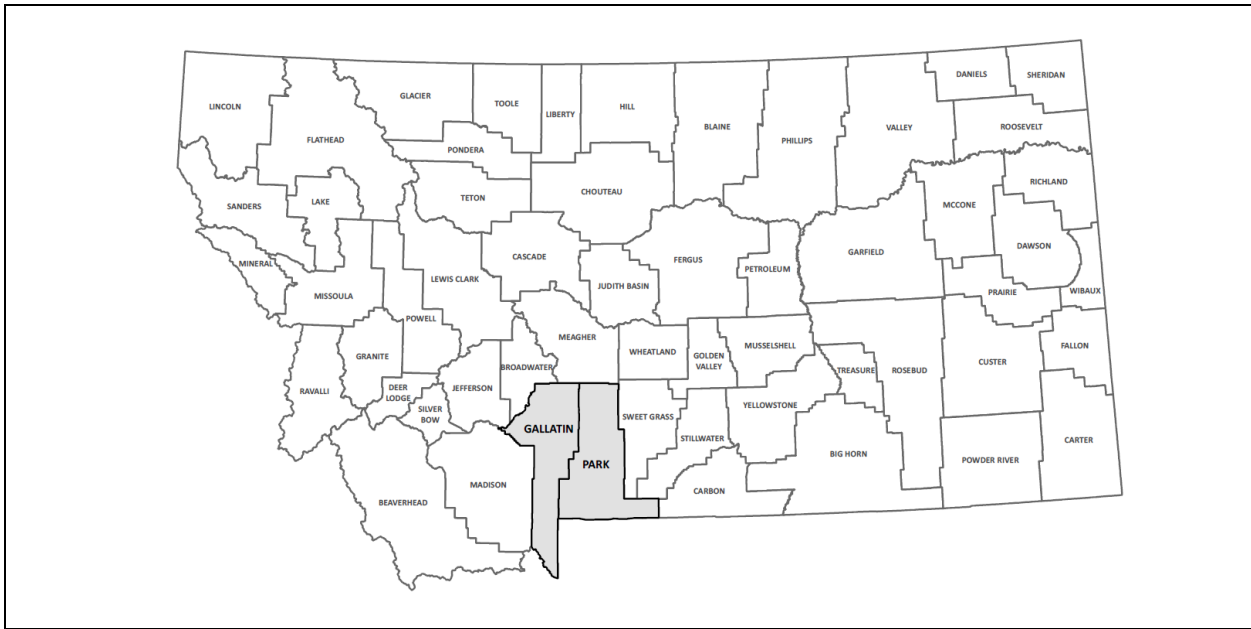
The 7 goals guiding the District over the next five years are:

- Goal 1:** Promote economic diversity, entrepreneur growth, and business retention and expansion throughout the District
- Goal 2:** Foster effective transportation access and support development of major transportation assets like the railroad, airport and highways systems
- Goal 3:** Expand the capabilities of a skilled, highly educated, permanent, and full time workforce for local businesses
- Goal 4:** Serve as a District-wide forum for coordinating economic development discussion and initiatives
- Goal 5:** Promote the use of technology to advance economic development activities including better tools to measure and evaluate economic impacts
- Goal 6:** Build on our unique natural assets to develop and enhance our tourist industries
- Goal 7:** Maintain and enhance the District's physical infrastructure

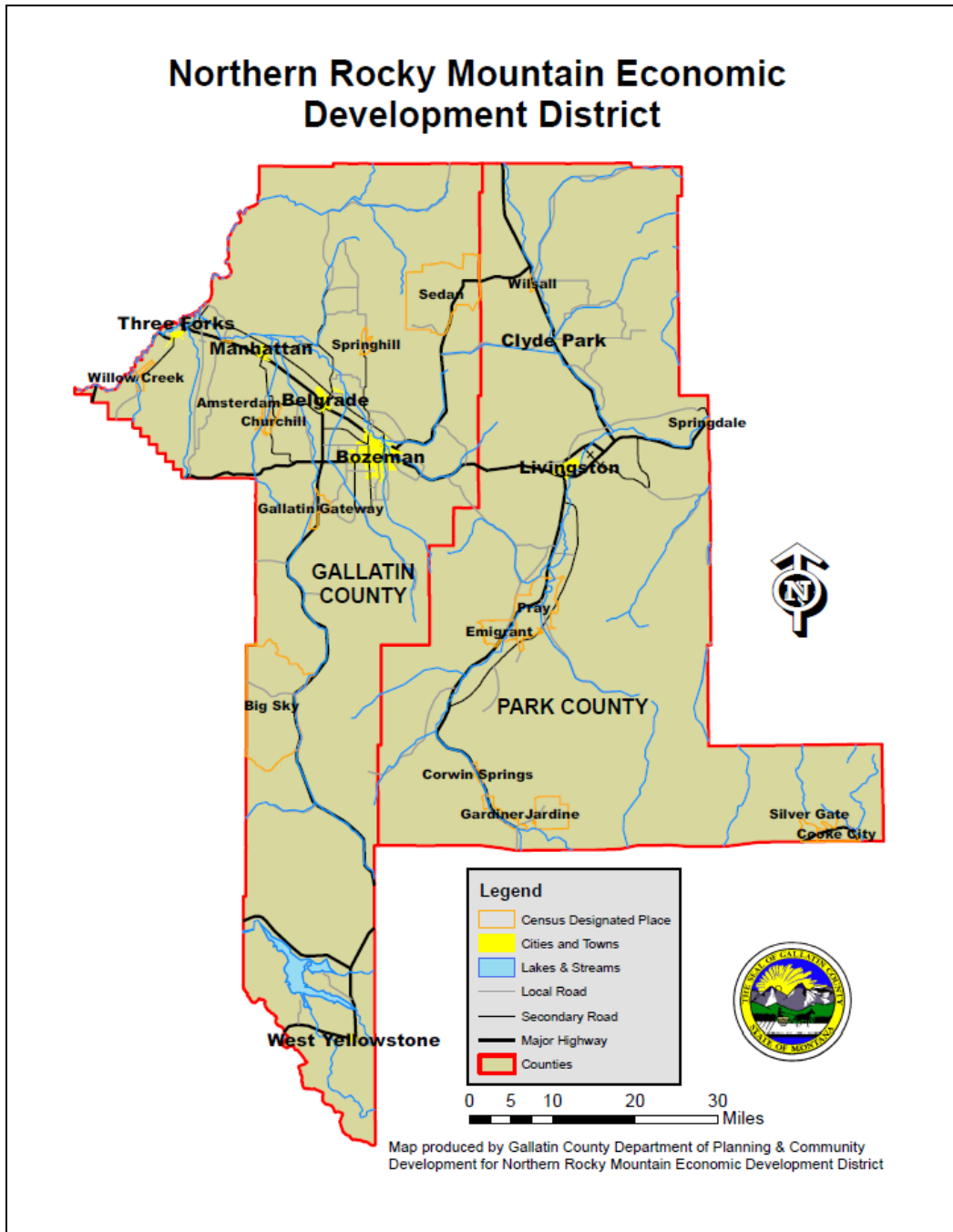
Considerable effort was made in this process to choose the strategies and priorities most likely to produce these outcomes and offering the best returns on investment of time, money, and staff

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resources. Priorities reflect the input provided by individual counties and communities in our region concerning their goals and concerns.



Map 1: Overview of the Northern Rocky Mountain Economic Development District Region



Map 2: Overview of the Northern Rocky Mountain Economic Development District

B. Who We Are

The Northern Rocky Mountain Economic Development District is a private, non-profit corporation created in 2012 to support economic development in the counties of Park and Gallatin. We represent a diverse area that includes the cities of Bozeman, Livingston, Belgrade, Manhattan, West Yellowstone, Three Forks, Gardiner, Wilsall, and many small towns and rural farming areas all with access to world renowned natural amenities.

We offer a variety of economic and community development services, small business technical assistance including start up and planning, grant writing and administration, and business recruitment and retention.

Our goal is to help the governments and citizens in each county achieve their economic goals while preserving their distinct cultures and way of life. We envision economically healthy, thriving communities that provide family wage jobs through a blend of vibrant entrepreneurial opportunities, diversified agricultural economies, efficient transportation systems linking communities, improved infrastructure, expanded retail opportunities, improved marketing, promotion and coordination of regional tourism, as well as attracting outside investment for projects and activities with regional impact.

Staff

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Participating Governments and Communities

Gallatin County City of Belgrade
City of Bozeman
Town of Manhattan
City of Three Forks
Town of West Yellowstone

Park County City of Livingston

C. NRMEDD Board of Directors

Pursuant to Section 13 CFR Ch. III the District must demonstrate that its governing body is broadly representative of the principal economic interests of the Region and must include at least one (1) Private Sector Representative and one (1) or more of the following: Executive Directors of Chambers of Commerce, or representatives of institutions of post-secondary education, workforce development

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groups or labor groups, all of which must comprise in the aggregate a minimum of thirty-five (35) percent of the District Organization's governing body. The governing body shall also have at least a simple majority of its membership who are elected officials and/or employees of a general purpose unit of State, local or Indian tribal government who have been appointed to represent the government.

The twenty-six member NRMEDD Board of Directors broadly represents all Section 13 CFR Ch. III requirements by including the principal economic interests of the Region including at least one (1) Private Sector Representative and one (1) or more of the following: Executive Directors of Chambers of Commerce, or representatives of institutions of post-secondary education, workforce development groups or labor groups, all of which must comprise in the aggregate a minimum of thirty-five (35) percent of the District Organization's governing body. The governing body shall also have at least a simple majority of its membership who are elected officials and/or employees of a general purpose unit of State, local or Indian tribal government who have been appointed to represent the government.

The Board of Directors represents both Gallatin and Park County and all incorporated municipalities within the counties. The Board is comprised of fourteen (14) Government Representatives (54%) and twelve (12) Non-Government Members (46%) of the Board. The Non-Government members are comprised of six (6) Private Sector Representatives, four (4) Stakeholder Groups, and two (2) Members at Large.

1. Government Representatives (54%)

Elected officials and/or employees of a general purpose unit of local government who have been appointed to represent the government.

Name	Jurisdiction	Position
Sean Becker	City of Bozeman	Mayor
Earl Mathers	Gallatin County	County Administrator/Appointed
Joe Skinner	Gallatin County	County Commissioner
Marty Malone	Park County	County Commissioner
Tony Haag	Town of Manhattan	Mayor
Brit Fontenot	City of Bozeman	Economic Devel. Director/Appointed
Pierre Martineau	Town of West Yellowstone	Mayor
Russ Nelson	City of Belgrade	Mayor
Brian Sprenger	Gallatin Field	Airport Manager/appointed by
		Gallatin Field airport board, special
		purpose unit of local government
Gene Townsend	City of Three Forks	Mayor
Steve Caldwell	City of Livingston	City Council
Bill Berg	Community Council	Council member-elect
James Bennet	City of Livingston	City Commission/Vote pending
Mark Shyne*	MT Mfg. Extension Service	Director/appt by MSU chancellor

*Mark Shyne represents State Government

2. Non-Government Representatives (38%)

A. Private Sector Representatives

Any senior management official or executive holding a key decision-making position, with respect to a for-profit enterprise.

Name	Company	Position
Tony Martel	Martel Construction	Owner
Bill Simkins	Simkins-Hallin Lumber	CEO
Scott Pogh	NW Farm Credit	VP-Relationship Mgt.
Don Seifert	TerraSentia Mineral LLC	Owner
Lew Wilks	Three Peaks Ranch	Owner
Peter Fox	ARCA	Western Regional Sales Manager

B. Stakeholder Organization Representatives

Executive directors of chambers of commerce, or representatives of institutions of post-secondary education, workforce development groups or labor groups.

Name	Organization	Position
Debra Youngberg	Belgrade Chamber of Commerce	Executive Director
Don Gimbel	Vision Livingston*	President
Dr. Paul Lachapelle	Montana State University	Faculty Member
Al Maurillo	Montana Job Service	Manager

*Vision Livingston Downtown Partnership serves as a chamber of commerce function for the area.

3. At Large Representatives (8%)

Other individuals or organizations.

Name	Organization	Position
Stuart Leidner	Prospera Business Network	Executive Director
Cheryl Ridgely	Bozeman Deaconess Hospital	Dir. Of Community Outreach/appt by hospital board

Calculations to Demonstrate Compliance with EDA Mandates:

	Number	Percent
1. Government Representatives (51-65%)	14	54%
2. Non-Government Representatives (35-49%)	10	38%
A. Private Sector Representatives (at least 1)	(6)	
B. Stakeholder Organization Representatives (at least 1)	(4)	
3. Members at Large	2	8%
Total	26	

D. Partner Development Organizations in the Region

One of the primary roles of the District is to coordinate between and partner with the various other economic development organizations in the region. The District intends to work closely with many of the obvious development partners such as Prospera Business Network and the various chambers of commerce throughout the District; additionally, the District hopes to coordinate activities with many of the other organization working on regional prosperity through both counties. These include the larger infrastructure entities, such as Montana Rail Link and the Bozeman Yellowstone International Airport, that connect communities in the District with the larger world. These also include other entities critical to the character, quality of life, and employment of the District such as Montana State University (the region's largest employer), Bozeman Deaconess Hospital (the hub of the area's health care industry and the second largest employer in the District), and Yellowstone National Park (one of the primary tourist draws in the region).

Additionally, the District will partner with MEDA, Montana's economic development association, to coordinate with other economic development districts throughout the state. With its low population, Montana's economic development organizations often work closely together to address issues that help the state as a whole. Likewise, the District intends to work closely with the Governor's Office of Economic Development to ensure resources are coordinated in an efficient manner. A recent example of this coordination began when the Governor's Office of Economic Development recently commissioned a study to better understand the optics cluster in Gallatin and Park Counties; the District is now taking the lead to extend that work by helping the 28 companies in the optics industry located in the District to explore ideas of cluster development and formation of an association.

Another recent example of coordination between the District and the other organizations in the state include work conducted for the CEDS. Prior to hiring the District's Executive Director, the District Board coordinated with MEDA for support with CEDS community meetings. MEDA worked with the Board to design meetings in both Livingston and Belgrade to gather information on local businesses and industries, projects, and challenges. Those reports are included in the appendices of this document.

Finally, Montana elected a new governor during the election of 2011 and the District has already begun reaching out to both the Governor's director of Economic Development as well as the new director of the Montana Department of Commerce (who is from Gallatin County). The District Board and Staff hope to quickly development relationships with the new administration to begin immediate coordination of economic development support to the District.

Other Economic Development Partner Organizations



The Gallatin Development Corporation, DBA Prospera Business Network, is a 501(c)(4) nonprofit organization offering a variety of small business resources designed to facilitate business growth and development.

Some of Prospera core activities include Business Relocation Services, Growth and Expansion Guidance, Montana Women's Business Center, and Small Business Loans. The Montana Women's Business Center is one of more than 100 Women's Business Centers across the nation, working to deliver counseling, training, mentoring, and networking services to women entrepreneurs and is the only program of its kind in Montana. Additionally, Prospera administers three revolving loan funds.

Stuart Leidner, Prospera Executive Director, sits on the NRMEDD Strategy Committee. Prospera's contact information is:

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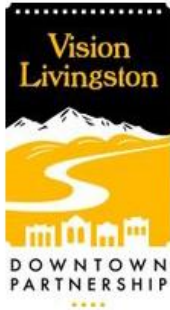


Bozeman BEAR and Livingston BEAR are Gallatin and Park County's Business Expansion and Retention programs. The programs are a partnership between several public, private, and nonprofit sector professionals and are sponsored by the Montana Economic Developer's Association. The BEAR programs work to connect client businesses to a network of consultants as well as provide Incumbent Worker Training Grants for existing employees.

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Warren.Vaughan@gallatin.mt.gov

Zanya Betley Livingston Job Service
Livingston BEAR
220 East Park Street
Livingston, Montana 59047
Phone: 406-222-8906

zbetley@mt.gov



Vision Livingston is a not for profit 501 (c) (3) corporation founded in 2007 as a Main Street program to revitalize the downtown commercial district. Vision Livingston is one of six designated Main Street communities for the state of Montana. As a Main Street program, Vision Livingston, through volunteer support and community outreach, is working to attract and retain new business, support our existing businesses through promotional activities and events, act as a resource for historic preservation issues and advocate for downtown business and property owners throughout the capital improvement process. As a Main Street program, Vision Livingston is focused on:

- The coordination of sidewalk improvements throughout the capital improvement process
- Coordinating with the City of Livingston for scheduled water and sewer repairs beginning July 2009 on B Street and proceeding into the historic commercial district as a phased construction project annually
- Communicating construction information to downtown merchant and property owners
- Coordinating, planning and providing professional and coordinated marketing efforts for downtown Livingston
- Planning for and providing economic development opportunities for downtown Livingston
- Facilitation and implementation of a Business Improvement District (BID) for downtown Livingston

The board of Vision Livingston consists of community leaders from the public and private sectors, property owners, merchants and associations. Vision Livingston strives to improve the economic health, safety and historic character of our best, last place, Livingston Montana.



The City of Bozeman created the Economic Development Council in 2010 to advise the City Commission on economic development issues and to review the implementation of the Economic Development Plan. [Ordinance No. 1784](#) created the Council while [Resolution No. 4195](#) adopted the Economic Development Plan in August, 2009. The stated goal of the Economic Development Plan is to foster a strong and diverse economy; where the needs of business are met through sufficient infrastructure, efficient regulatory environment, adequate education and workforce development; where economic development resources are leveraged, a more collaborative working partnership exists between the business community and the City of Bozeman. The Plan provides Bozeman with the opportunity to address the community's most pressing economic development needs and to come together behind a strategy for progressive and sustainable change. The benefit that will come from successful implementation of the goals and strategies contained in this Plan will positively impact the operations of all Bozeman businesses (both large and small) and the lives of all Bozeman residents. The Plan will enable Bozeman to be a premier city in the Rocky Mountain west that recognized early the need to support economic development to maintain its high quality of life.

Currently, four of the eight Economic Development Council members are either on the NRMEDD or its Strategy Committee. The EDC contact information is:

Brit Fontenot Economic Development & Community Relations
City of Bozeman
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The City of Bozeman's Economic Development Plan can be found here:

<http://weblink.bozeman.net/WebLink8/ElectronicFile.aspx?docid=44550&&dbid=0>



The Downtown Bozeman Partnership is a member managed limited liability corporation. The member organizations include the Downtown Bozeman Association (DBA), Business Improvement District (BID), and Tax Increment Fund (TIF) which established the Partnership as an incorporated management agency. The Downtown Bozeman Partnership provides combined operational support in the form of offices and employees for the three member organizations. As such, the Partnership is the unified identity of the DBA, BID and TIF, as each organization works independently and collectively on behalf of downtown Bozeman. The Downtown Bozeman Partnership coordinates extensively with City of Bozeman staff, the City Commission, and the Parking Commission. The Partnership works in conjunction with many of the City's citizen advisory boards on a variety of issues as they pertain to downtown. Perhaps most important, the Partnership continually strives to foster strong relationships with downtown property and business owners. All of these cooperative efforts strengthen downtown as a critical element in the greater community fabric.

Chris Naumann, Executive Director for the Downtown Bozeman Partnership, is on the NRMEDD Board of Directors. Their contact information is:

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E. History of Economic Development in Park & Gallatin County

The following is a brief history of economic development efforts within the Northern Rocky Mountain Economic Development District.

Park County

The Park County Economic Development Corporation was formed in 1986 to assist existing industries with expansion and to attract new industries that provide reliable, sustainable economic growth. Park County Economic Development Corporation changed its name to Alliance Development Corporation in June 2002. Alliance's mission is to bring meaningful economic development to Park County. This mission is accomplished by developing programs to retain and grow existing businesses and recruit new businesses to Park County. The Alliance Development Corporation has recently merged with the Northern Rocky Mountain Resource Conservation and Development (RC&D) program.

The Northern Rocky Mountain (RC&D, originally sponsored by the USDA, was designed to encourage and improve the capability of State and local units of government and local nonprofit organizations in rural areas to plan, develop, and implement programs for resource conservation and development.

The RC&D covers Park, Gallatin, and Meagher counties. The RC&D vision is to help create local and regional economic stability through development, proper use, and conservation of the human and natural resources in the RC&D area. A board of directors governs the RC&D. Board members represent various communities, local government, and other groups in the three-county area.

Gallatin County

The Bozeman Downtown Business Association, working together with a group of local business people, formed the Gallatin Development Corporation (GDC) as a non-profit in 1985. GDC was developed to assist existing businesses and attract new businesses to create jobs for local residents. During the late 1980's and early 1990's GDC, in partnership with the District IX Human Resource Development Council, Montana Job Service and others were quite active in the facilitation of Community Development Block Grant projects that would become the basis for several CDBG Revolving Loan Funds. CDBG Economic Development Grant funding was used in coordination with federal Job Training Partnership Act (JTPA) funding and federal Tax credit programs like the Targeted Jobs Tax Incentive Program (TJTC). These projects provided loan funding, job training, and tax credits to new and expanding business and also favored job creation for low-to-moderate income residents. During that time period, the City of Bozeman developed projects for Schnee's Boots & Shoes, ILX Lightwave, Lattice Materials Corporation (2 loans), CVR Oak Designs and Reliable Transaction Processing. These loans totaled \$1.1M and initiated the Bozeman RLF. In 1987 Gallatin County sponsored a project for Lifelink International in the amount of \$232,700 that initiated their RLF. The City of Belgrade sponsored projects for Butler Creek and Dynojet Research Inc. that initiated their RLF and the Bruce Industrial Park Development. The Town of West Yellowstone sponsored a project for Ralide that initiated their RLF program.

GDC was renamed Prospera in 2006. The GDC currently hosts the Small Business Development Center (SBDC), a program of the US Small Business Administration and the Montana Department of Commerce. The SBDC provides technical assistance to businesses in Park and Gallatin Counties. The Northern Rocky Mountain Resource Conservation & Development District was created in 2001 to encourage and improve the capability of state and local units of government and local nonprofit organizations in rural areas to plan, develop and implement programs for resource conservation and development. The RC&D began receiving funding from the U. S. Department of Agriculture in 2002. The Northern Rocky Mountain RC&D area covers Park, Gallatin and Meagher counties. The RC&D vision is to help create local and regional economic stability through development, proper use and conservation of the human and natural resources in the RC&D area.

In 2011, the Montana Community Development Corporation (MCDC) opened an office in downtown Bozeman and began providing service to Gallatin and Park counties. MCDC provides business financing to individuals across the state from offices in Missoula, Bozeman, and Kalispell. Primary services offered by MCDC include loans, business counseling through the Small Business Development Center, and assistance through the Procurement Technical Assistance Program.

Recent Investments in the Region

In recent years, various organizations have made significant investments in the region. For example, the Bozeman Yellowstone International Airport changed its name (formerly Gallatin Field Airport) and doubled the size of its facilities in preparation of continued growth in airport deplanings (the airport continues to see record years as documented in sections below). Another example includes the \$38 million dollar airport interchange project led by Gallatin County, the City of Bozeman, the City of Belgrade, the Montana Department of Transportation, and Senator Max Baucus' office to construct a new airport interchange along I-90 immediately east of Belgrade that will provide direct access to the airport.

Other projects include drafting of the first-ever economic development plan for the City of Bozeman (as well as the hiring of a first-ever economic development director and creation of the first economic development council); significant water and sewer infrastructure investments in the Four Corners and Gallatin Gateway communities in Gallatin County and as well as significant water/sewer investments in the Town of Manhattan; and initiation of the Yellowstone National Park Entrance project in Gardner. Others examples of recent significant investment into expansion of Jackrabbit Lane in Gallatin County by the Montana Department of Transportation will benefit transportation circulation in the fastest growing area of the District; private sector investment into the RAE water and Sewer District in Gallatin County will drive significant development immediately west of Bozeman; and the \$30 million broadband project secured by Montana Opticom will provide greatly enhanced broadband connectivity throughout the Big Sky-to-Manhattan corridor.

F. Organization and Management of the CEDS Process

The Northern Rocky Mountain Economic Development District was re-formed in October 2011 and includes Park and Gallatin Counties. The U.S. Department of Commerce Economic Development Administration (EDA) awarded the District a Short Term Planning Grant (No. 05-86-05197) to (a) re-establish the Board of Directors and begin rejuvenating the work of the District, (b) establish an Advisory Committee to oversee and advise on the CEDS process, (c) hire an Executive Director, and (d) develop a comprehensive CEDS pursuant to EDA requirements (Appendix A).

A strategy committee was formed in December 2011 to oversee the CEDS process. The committee not only analyzed the data collected from background research and public comments, but used the information to create a vision and develop strategies to implement the projects and programs identified in the CEDS. The committee will track and monitor the on-going status of the CEDS. This accomplishes

three very important and necessary planning goals: consistent leadership is available, creation of a unified plan results in elimination of duplication, and a regional plan is developed for the counties and their communities.

The CEDS is a local planning and implementation process designed to create jobs, foster more stable and diversified economies, improve living conditions, and provide a mechanism for guiding and coordinating the efforts of persons and organizations concerned with all aspects of rural and economic development. The planning process analyzes local conditions, identifies strengths, weaknesses, problems, and opportunities, designs strategies to achieve goals, coordinates activities to implement the strategies, and evaluates accomplishments. Planning for community, economic or rural development is a continuous and ongoing process. The action items identified in the CEDS will be accomplished by many different groups, communities and agencies. There are many worthy projects in the action plan of this document that, due to the limitations of the District's resources and staffing, this organization may not be able to work on directly. The projects listed herein represent the desires of people residing in the area and will contribute to the region's economic development, and thus rightly have a place in this CEDS document.

Elements of the CEDS process:

1. **Analysis** – The analysis assesses the state of the regional economy, the opportunities and threats posed by external trends and the availability of partners and resources for economic development.
2. **Vision and goals** – The community's vision and goals, together with an appraisal of the region's competitive advantage (strengths and weaknesses), sets the strategic direction for the action plan.
3. **Action Plan** – The action plan establishes priority programs and projects for implementation.
4. **Evaluation** – Criteria are established to evaluate the process for periodic update of the document and its elements. The CEDS document will be evaluated as information changes and to determine the success of the action plan being implemented. Changes will be made as deemed appropriate.

G. Strategy Committee

The Strategy Committee oversees the CEDS process. The committee is responsible for developing, updating, or replacing a strategy and is the principal facilitator of the economic development planning and implementation process. The Strategy Committee's members represent a cross section of county economic and community organizations.

The NRMEDD Strategy Committee is established to serve as the oversight body for the Comprehensive Economic Development (CEDS) Strategy process. The composition of this committee is designed to conform to EDA guidelines, provide adequate geographic distribution and be representative of the

Northern Rocky Mountain Economic Development District

District’s varied business sectors. The Strategy Committee must represent the main economic interests of the region, and must include Private Sector Representatives (defined in 13 C.F.R. § 300.3, with respect to any for-profit enterprise, as any senior management official or executive holding a key decision making position, or that person's designee) as a majority of its membership. In addition, the Planning Organization should ensure that the Strategy Committee also includes:

- Public officials
- Community leaders
- Representatives of workforce development boards
- Representatives of institutions of higher education
- Minority and labor groups; and
- Private individuals

1. **Private Sector representatives (at least 51%).** These representatives consist of senior management officials or executives holding key decision-making positions, with respect to for-profit enterprises.

Business Owners

Name	Position	Organization
Don Seifert	Owner	TerraSentia Mineral LLC (owner)
Matt McCune	Owner	Autopilot Design (owner)
Lew Wilks	Owner	Three Peaks Ranch (owner)
Mike Hope	Owner	Ferraro’s Restaurant (owner)
Tony Martel	Owner	Martel Construction (owner)
Bill Berg	Owner	Cool Works (owner)
Joe Skinner	Owner	Story Creek Enterprises, Inc.
Peter Fox*	Manager	ArcaSearch Corporation

*Peter Fox is appointed by the owners to represent ArcaSearch Corporation

2. **Representatives of Other Economic Interests.** Representatives of other economic interests (no more than 49%). Persons who provide additional representation of the main economic interests of the region. These may include, but are not limited to: public officials, community leaders, and representatives of workforce development boards, institutions of higher education, minority and labor groups, and private individuals.

Name	Position	Organization
Chris Naumann	Executive Director	Bozeman Downtown Business Association
Debbie Berg	Director	Montana Job Service
Pierre Martineau	Elected Official - Mayor	Town of West Yellowstone

Interests represented on CEDS committee	Number	Percent
Private Sector Representatives – Business Owners	8	73%
Private Sector Representatives – Other Economic Interests	3	27%
Total Committee Membership	11	100%

H. Community Participation in 2012 CEDS Process

The District’s 2012 CEDS process has taken approximately 12 months. It began in earnest in October 2011 with submission and approval of the District’s work plan to EDA. The Strategy Committee was formed a month later and first convened in December 2012. Data gathering began in earnest in January 2012.

The District primarily employed a “Strength, Weakness, Opportunities, and Threats” (SWOT) inquiry to assess community needs and desires. This was augmented in several meetings by Appreciative Inquiry, where participants were also asked to also focus on what was working well in their communities and/or sectors and how those conditions might be replicated.

Between February 2012 and June 2012, the following events were held:

March 7-8, 2012: Montana Economic Developer (MEDA) resource team two-day listening sessions held in Belgrade (Gallatin County). The Strategy Committee coordinated with MEDA to assemble a team of economic development professionals from across the state. This team worked with District staff to engage residents of Belgrade across multiple sectors in identifying strengths, challenges, and potential projects. Report may be found at: <http://www.medamembers.org/Belgrade%20Report.pdf>.

March 22, 2012: Bozeman Economic Summit held (partnership between the District, the City of Bozeman, Gallatin County, Montana State University Local Government Center, and Prospera Business Network). The event combined short presentations by individuals in a variety of sectors with large group discussion. Participants were asked to strengths, opportunities, barriers, and potential projects. Over 100 individuals participated in the discussion and provided hundreds of comments informing the CEDS. Follow up meeting held May 10, 2012 to discuss results and further identify potential projects.

April 11-12, 2012: MEDA resource team two-day listening sessions held in Livingston (Park County). The Strategy Committee coordinated with MEDA to assemble a team of economic development professionals from across the state. This team worked with District staff to engage residents of Livingston across multiple sectors in identifying strengths, challenges, and potential projects. Report may be found at: http://www.medamembers.org/Livingston_Report.pdf

April 14, 2012: CEDS public input meeting held in Wilsall (Park County). Staff met with Park County officials and members of the public to gather input for the SWOT and potential projects.

April 16, 2012: CEDS public input meeting held in Clyde Park (Park County). Staff met with members of the city council, planning board, and public to gather input for the SWOT and for potential projects.

April 19, 2012: CEDS public input meeting held in Emigrant (Park County). Staff met with Park County officials and members of the public to gather input for the SWOT and potential projects.

April 25, 2012: CEDS public input meeting held in West Yellowstone (Gallatin County). Staff met with members of the city council members, the West Yellowstone Chamber of Commerce, West Yellowstone Economic Development, and members of the public to gather input for the SWOT and potential projects.

April 27th, 2012: CEDS public input meeting held in Cooke City (Park County). Staff met with members of the public to gather input for the SWOT and potential projects.

May 1st, 2012: CEDS public input meeting held in Gardner. Staff met with members of the public and the Gardner Community Council to gather input for the SWOT and potential projects.

Additionally, CEDS input surveys were distributed in Big Sky, Manhattan, Three Forks, and to many individuals throughout the District who were unable to make the public input events. The input surveys mirrored questions asked at the public input meetings. Over 125 surveys were collected from across the district; the comments were used to inform the vision, goals, and projects of the CEDS. The survey input form is included in Appendix C.

Over the course of the past 12 months, the District identified the following economic sectors and clusters present and active in the local economy:

- Art/Culture
- Non-profit
- Health Care
- Agriculture
- Entrepreneurship/Small Business
- Tourism and Recreation
- Education
- Workforce
- Transportation/Infrastructure
- Manufacturing/Industrial
- Governmental Services – Police, Fire, EMR
- Real Estate
- Construction
- Finance
- Professional Services
- Outdoor Industry
- Technology
- Photonics
- Hospitality

Overall, approximately 425 individuals participated in the CEDS process through public meetings, individual surveys, serving on the Strategy Committee, or directly helping with data gathering. The input from these public forums has been used to draft the vision, goals, and projects of the 2012 CEDS.

I. Organization of the Plan

The rest of this document lays out the results of the past 12 months of work.

- Chapter 2 presents data on the economy;
- Chapter 3 discusses strengths and weaknesses;
- Chapter 4 describes the vision and goals of the District as well as the priority implementation measures and projects; and
- Chapter 5 concludes with a discussion on performance measures and evaluations.

Appendices

- A. Resource documentation and bibliography
- B. Bozeman Meeting Summaries
- C. SWOT Survey/Input Form
- D. MEDA – Livingston Assessment
- E. MEDA – Belgrade Assessment

Chapter 2: District Economy and Background Information

A. Background

Gallatin and Park Counties serve as the gateway to Yellowstone National Park in Southwestern Montana. The region is southwest Montana's economic hub, featuring a variety of high-tech and professional service businesses. The region is also home to a robust, year-round tourism industry focused on Yellowstone National Park and two nationally rated ski resorts as well as many large working farms and ranches. Montana State University brings over 14,000 students to the District as well as significant economic and cultural value, and the District's residents are the most educated in the state, with over 40% of residents in Gallatin County holding bachelor degrees or higher.

While only two counties are represented in the District, the counties make up a large and diverse land area. The District is approximately 5,416 acres with an average of 19.5 persons per square mile. The population is not evenly distributed: Gallatin County has an average population density of 34.4 persons per square mile, while Park County had six persons per square mile.

Gallatin County is Montana's fourth largest county, with a 2010 population of 89,513, and is home to five incorporated cities and towns: Bozeman (the county seat and the state's fourth largest city), Belgrade, Manhattan, Three Forks, and West Yellowstone. All but West Yellowstone are located in the Gallatin Valley; West Yellowstone is located at the southern end of Gallatin County and serves as the western entrance to Yellowstone National park.

Park County is home to the incorporated City of Livingston and the Town of Clyde Park, as well as the unincorporated communities of Cooke City, Emigrant, Gardiner, Silvergate, Springdale, and Wilsall. Most communities cluster near the Interstate 90 corridor in the north and entrances to Yellowstone National Park in the south.

Park County is Montana's 12th largest county, with a 2010 population of 15,941. Livingston, the seat of county government, is the state's 12th largest city with a population of 7,044.

The District boasts a high quality of life, world-class rivers, accessible public lands, a variety of parks and trails, and Yellowstone National Park, drawing both tourists and new residents to our outdoor lifestyle. While the recession in 2008 had significant impact on the county's economy, Gallatin County still had the highest population growth of any county in the state at 32%.

Business and vacationing travelers are well served by the recently expanded Bozeman-Yellowstone International Airport, Interstate 90, and several state highways. Commercial transport is served by air, rail, and truck. The county is well situated for travel to other Montana cities via highway, including Butte, Billings, and Helena.

B. Population and Demographics

Gallatin County had a population of 89,513 in 2010, an increase of 31% from 2000. Bozeman, the county seat, has a 2010 population of 37,280, an increase of 35.5% since 2000. Other incorporated

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cities within Gallatin County include Belgrade, Manhattan, Three Forks, and West Yellowstone. All incorporated cities and towns within Gallatin County saw population increase in the past decade.

Park County had significantly less population growth: in 2010, the total population was 15,941, a 1.6% increase from 2000. Livingston, the county seat, had a 2010 population of 7,044, a 2.8% increase since 2000.

The region as a whole has a low level of diversity: Gallatin County's population consists of 95.1% Caucasian; 0.3% African American; 0.9% American Indian/Alaska Native; 1.1% Asian; 0.1% Native Hawaiian; and 2.8% persons of Hispanic origin. Park County's demographics are similar: 96.5% of the population is identified as Caucasian; 0.1% African American; 0.8% American Indian and Alaska Native persons; 0.3% Asian; 2.1% Hispanic or Latino origins; and 1.6% reporting two or more races.

Chart 1: Gallatin County Demographics. Source: U.S. Census

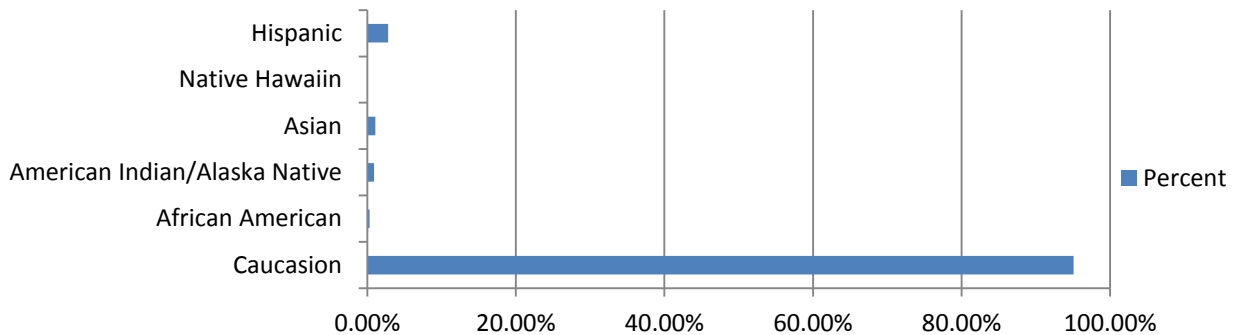
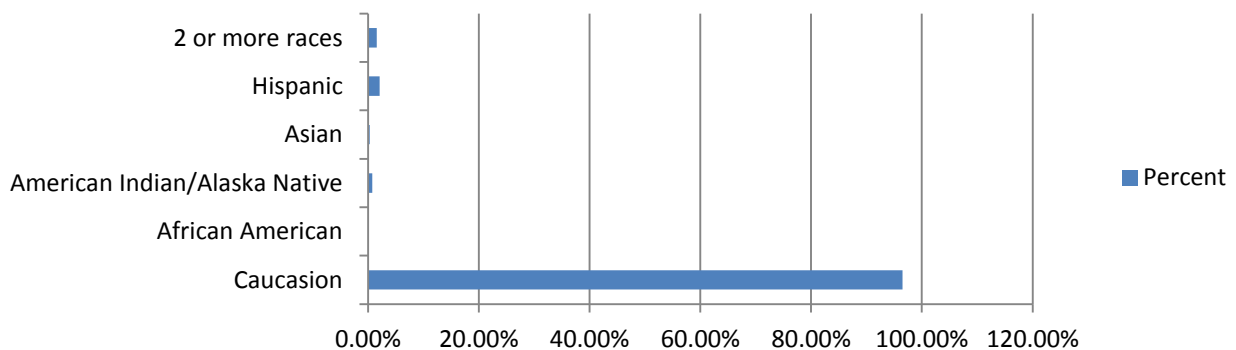


Chart 2: Park County Demographics. Source: U.S. Census



Distribution of Population by Age, 2010

Because of the impact of Montana State University, Gallatin County's population, when distributed by age range, has a relatively young population compared to the state of Montana: 17% of the county's

population falls in the 25-34 age range, followed by 12.5% in the 45-54 age range and 12.4% in the 35-44 age range.

Park County’s population is looks more like the state as a whole: in 2010, 18% of the population was between 50 and 59; 14% of the population was between 40 and 49; and 13% was between 60 and 69. For comparison, the state of Montana, in contrast, has 15% of the population in the 45-54 age range, 12% in the 25-34 age range, and 11.4% in the 35-44 age range

Table 1: Age Ranges, Gallatin and Park Counties (Source: U.S. Census)

Age Range	Gallatin County (% of Total)	Park County (% of Total)	State of Montana (% of Total)
Less than 5	6.4%	5.2%	6.3%
5 - 9	5.9%	5%	6.1%
10 – 19	12.7%	11%	12.9%
20 – 29	20.8%	8.6%	13.3%
30 – 39	14.4%	12.8%	11.5%
40 – 49	12.3%	14.5%	13%
50 -59	13%	18.4%	15.7%
60 – 69	7.9%	13%	11.1%
70 – 79	3.6%	6.6%	6.1%
80 – 89	2.2%	3.7%	3.4%
90+	0.5%	0.7%	0.7%

C. Socio-Economic Characteristics

Overview

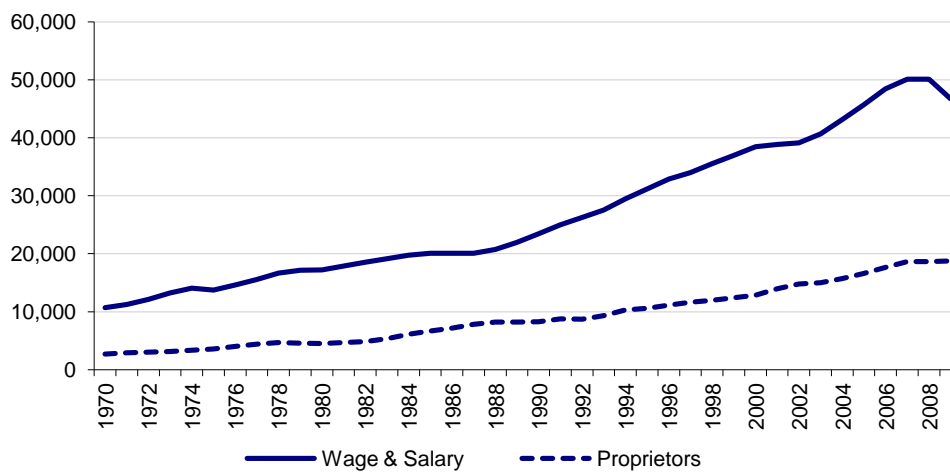
From 2000-2009, Gallatin County added more than 14,000 jobs (including both wage and salary jobs and proprietors), an increase of 27%. More than 80% of that job growth came in the “services” sector, including jobs in finance, real estate, insurance, and other professional services. By 2009, the three industry sectors with the largest number of jobs were government (including university) (9,787); retail

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trade (7,773); and construction (6,523). The three industry sectors that added the most jobs in that time were real estate, rental, and leasing (1,849); professional, scientific, and technical services (1,748); and construction (1,306).

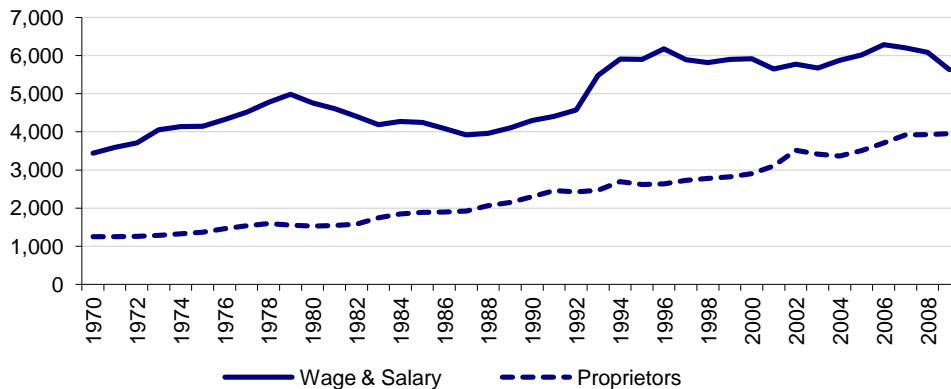
From 2000-2009, Park County added 752 jobs (including both wage and salary jobs and proprietors), an increase of 8.5%. Out of the jobs added from 2001-2009, 14% were service related; the remainder included jobs in sectors mining and forestry. By 2009, the three industry sectors with the largest number of jobs were accommodation and food services (1,393); retail trade (988); and construction (832). The three industry sectors that added the most jobs in that time were arts, entertainment, and recreation (223); real estate, rental, and leasing (203); and accommodation and food services (122).

Chart 3: Components of Employment, Gallatin County MT



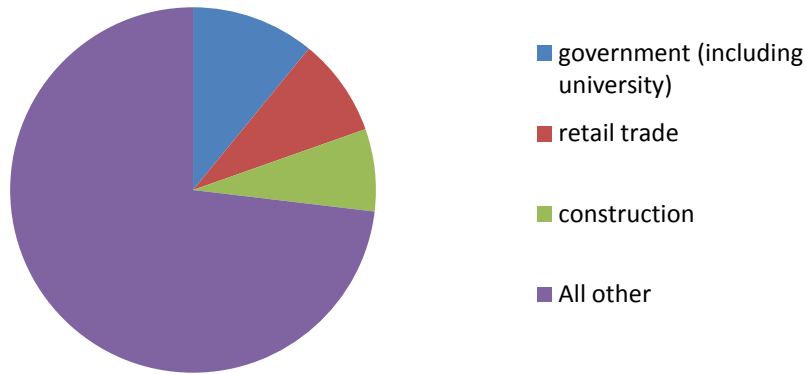
Source: U.S. Department of Commerce, 2011. Bureau of Economic Analysis, Regional Information System, Washington, D.C. Table CA30

Chart 4: Components of Employment, Park County MT



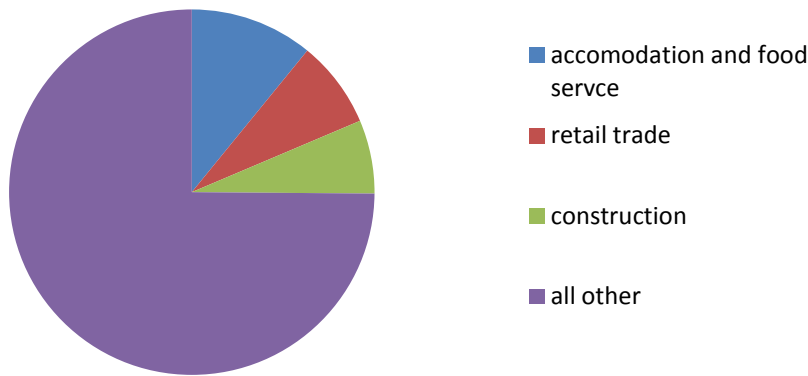
Source: U.S. Department of Commerce, 2011. Bureau of Economic Analysis, Regional Information System, Washington, D.C. Table CA30

Chart 5: Number of Jobs per Sector, Gallatin County 2009



Source: U.S. Department of Commerce, 2011. Bureau of Economic Analysis, Regional Information System, Washington, D.C. Table CA30

Chart 6: Number of Jobs per Sector, Park County



Source: U.S. Department of Commerce, 2011. Bureau of Economic Analysis, Regional Information System, Washington, D.C. Table CA30

Table 2: Top 20 Private Employers in Gallatin County (Based on 2nd Quarter 2011 Data, listed in alphabetical order)

<i>Business Name</i>	<i>Size Class</i>	<i>Business Name</i>	<i>Size Class</i>
Albertsons	6	Murdoch's Ranch and Home Supply	6
Bozeman Deaconess Hospital	9	Reach, Inc.	6
Community Food Co-op	6	Ressler Motors	6

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Costco	6	Right Now Technologies	8
First Security Bank	6	Rosauers	6
Gibson Guitar	6	Target	6
Kenyon Noble Lumber and Hardware	6	Town and Country Foods	6
Lowe's	6	Town Pump	6
Martel Construction	6	Wal-Mart	7
McDonald's	6	Zoot Enterprises	6

Employment Size Class Coding: Class 9 = 1,000 + employees, Class 8 = 500 to 999, Class 7 = 250 to 499, Class 6 = 100 to 249

Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Gallatin County.

Table 3: Top 20 Private Employers in Park County (Based on 2nd Quarter 2011 Data, listed in alphabetical order)

Business Name	Size Class	Business Name	Size Class
	6	Murdoch's Ranch and Home Supply	6
	9	Reach, Inc.	6
Community Food Co-op	6	Ressler Motors	6
	6	Right Now Technologies	8
First Security Bank	6	Rosauers	6
Gibson Guitar	6	Target	6
Kenyon Noble Lumber and Hardware	6	Town and Country Foods	6
	6	Town Pump	6
Martel Construction	6	Wal-Mart	7
McDonalds	6	Zoot Enterprises	6

Employment size class coding: Class 7= 250 to 499 employees, Class 6 = 100 to 249, Class 5 = 50 to 99, Class 4 = 20 to 49

Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Park County.

Personal Income

Between 2001 and 2009, personal income in Gallatin County rose 25%. The top three industry sectors which saw the greatest increase in personal income were health care and social assistance (a 74.7% increase); professional, scientific, and technical services (a 70% increase); and transportation and warehousing (a 70% increase).

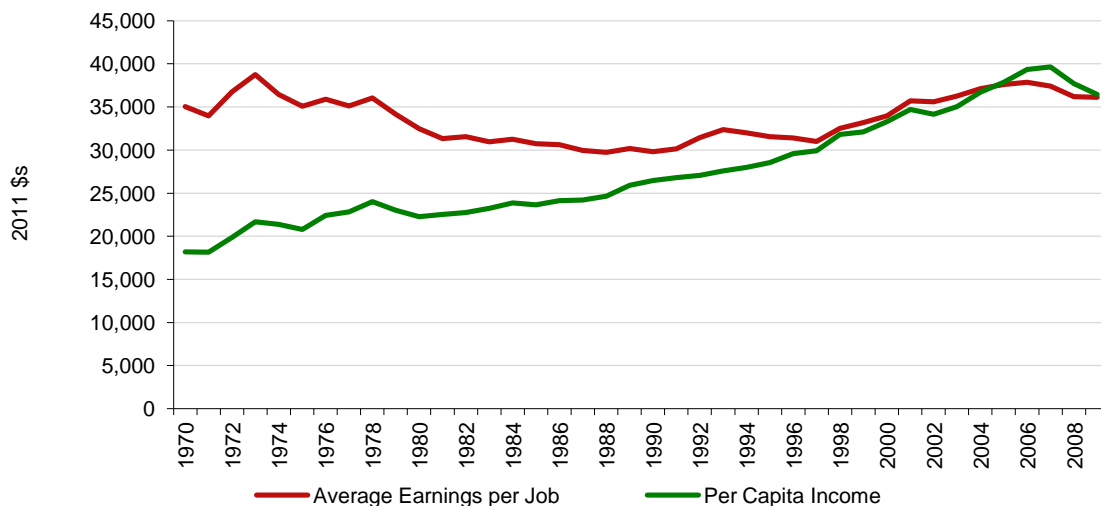
During that same time, total personal income in Park County rose 27.5%. The top three industry sectors which saw the greatest increase in personal income were arts, entertainment, and recreation (254%); farm (182%); and mining (133%). Government, which consists of 15.7% of the total personal income in Park County (the highest sector), increased by 16.9% between 2001-2009.

The regional economy is anchored by Montana State University, with more than 9,000 jobs in the District related to MSU (MSU Economic Impact Report 2010). This includes individuals working directly for MSU as well as individuals working in jobs outside MSU but related to the university.

Average earnings per job and per capita income

Gallatin County also saw an increase in average earnings per job and per capita income: the average earnings per job increased 6.3% to \$36,111 between 2000 and 2009; per capita income (total personal income divided by population) rose 9.4% to \$36,455 during that same time. While this shows an increase in the last decade, it is important to note that both of these measures have been cut in half from their 2007 highs, and the average earning per job is still less than its all-time high of just under \$40,000 in 1973.

Chart 7: Average Earnings per Job & Per Capita Income, Gallatin County MT



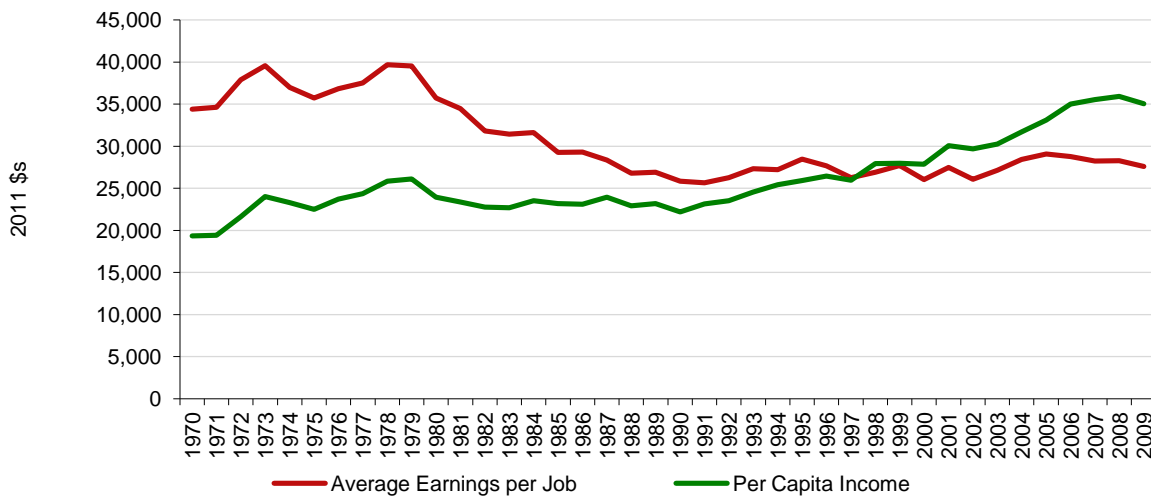
Source: U.S. Department of Commerce, 2011. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table CA30

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By 2010, the average wage in Gallatin County had dropped to \$35,185. This ranged from government jobs, paying an average of \$41,606, to service jobs (including business and professional services), paying an average of \$32,445. The number of workers employed in service jobs far outpaced either government or non-service jobs: 67% of the 42,492 jobs in Gallatin County in 2010 were in the service category; government and non-service jobs made up 17% and 14% respectively.

Park County also saw an increase in average earnings per job and per capita income. The average earnings per job increased 6% to \$27,586 between 2000 and 2009; per capita income rose 25.7% to \$35,049 during this same time. It should be noted that the average earnings per job in 2009 represents a real dollar decline of nearly \$10,000 from the 1972 high of \$37,503.

Chart 8: Average Earnings per Job & Per Capita Income, Park County MT



Source: U.S. Department of Labor, 2011. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Washington, D.C.

The 2008 recession caused job losses, but did not prompt a reduction in wage earnings. The average wage in Park County for 2010 was \$28,954. This ranged from an average annual wage for government employees of \$35,914 to service jobs (including business and professional services), paying an average annual wage of \$26,178. The number of workers employed in service jobs far outpaced either government or non-service jobs: 71.8% of the 5,174 jobs in Park County in 2010 were in the service category; government and non-service jobs made up 14.3% and 14%, respectively.

Northern Rocky Mountain Economic Development District

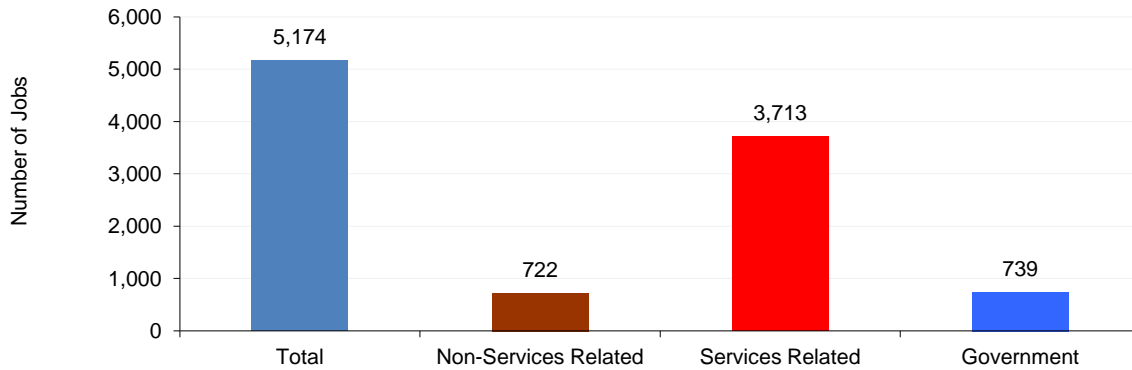


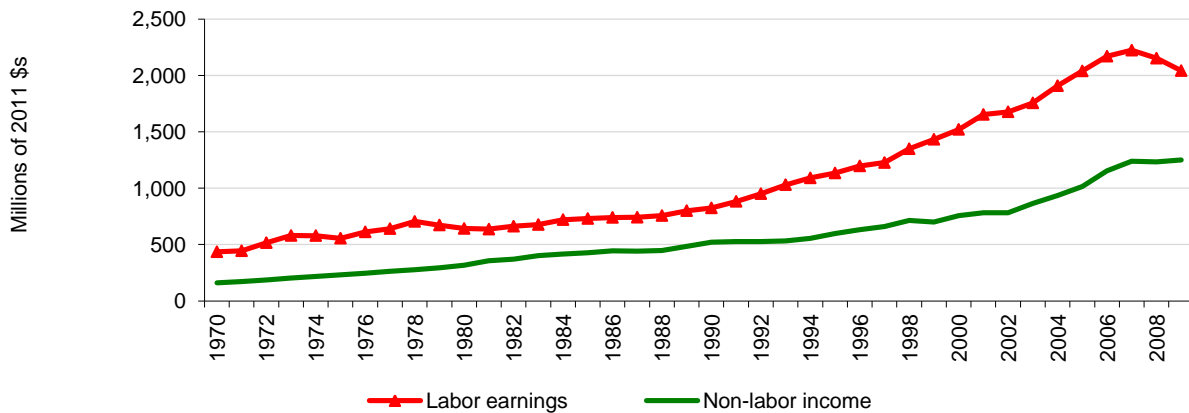
Chart 9: Wages and Employment, Services Industry vs All Other Industries, Park County 2010. Source: U.S. Department of Labor, 2011. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Washington, D.C.

Labor vs. Non-Labor Income

A community's income can be divided into labor versus non-labor income. Labor income represents wages, salaries, etc; non-labor income represents money earned from investments as well as payments from the government. Since 1970, Gallatin County saw non-labor income increase by 680%, while labor income increased 369%. The percentage of non-labor income as a percentage of total personal income increased from 27% to 38%.

This measure is important because it indicates an increasing number of residents who earn wealth outside the community relocating to Gallatin County.

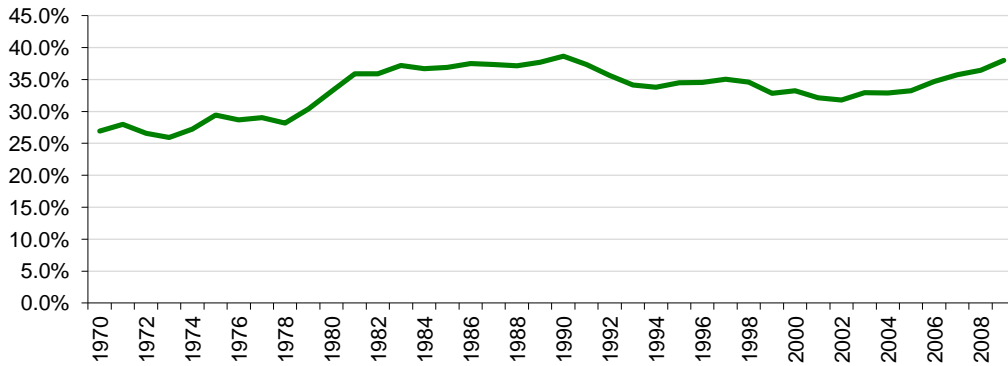
Chart 10: Components of Personal Income, Gallatin County MT



Source: U.S. Department of commerce, 2011. Bureau of Economic Analysis, regional information system, Washington, D.C., Tables CA05 & CA05N

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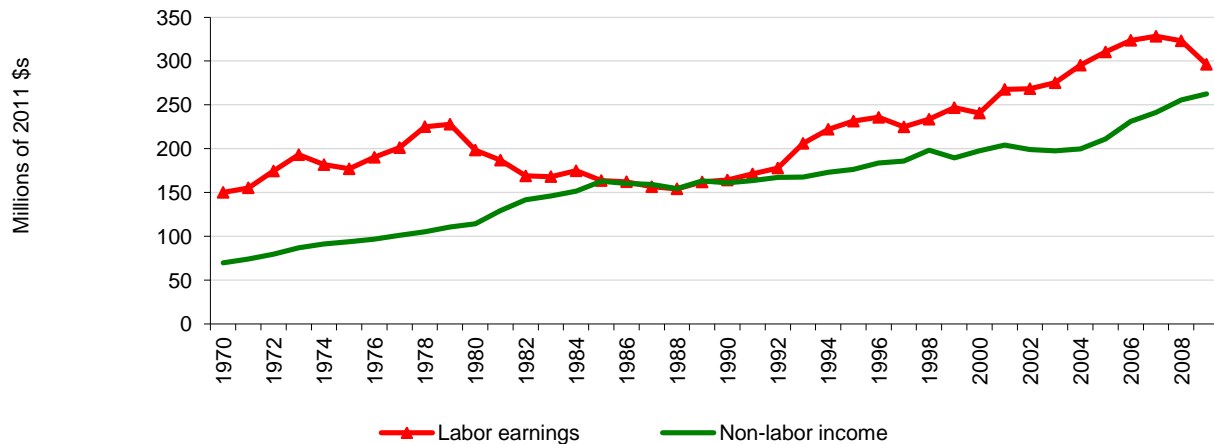
Chart 11: Non-Labor Income Share of Total Personal Income, Gallatin County MT



Source: U.S. Department of commerce, 2011. Bureau of Economic Analysis, regional information system, Washington, D.C., Tables CA05 & CA05N

Since 1990, the percentage of total personal income comprised by labor and non-labor income, respectively, stayed relatively flat. Labor income comprised 50.5% of income in 1990 and moved up to 53% by 2009. The relocation of major maintenance shops operated by the Burlington Northern railroad in the mid-1980s, however correlates with precipitous drop in labor income, from which the community has not recovered: In 1980, labor income comprised 63.5% of total personal income. Ten years later, that number had decreased 13%.

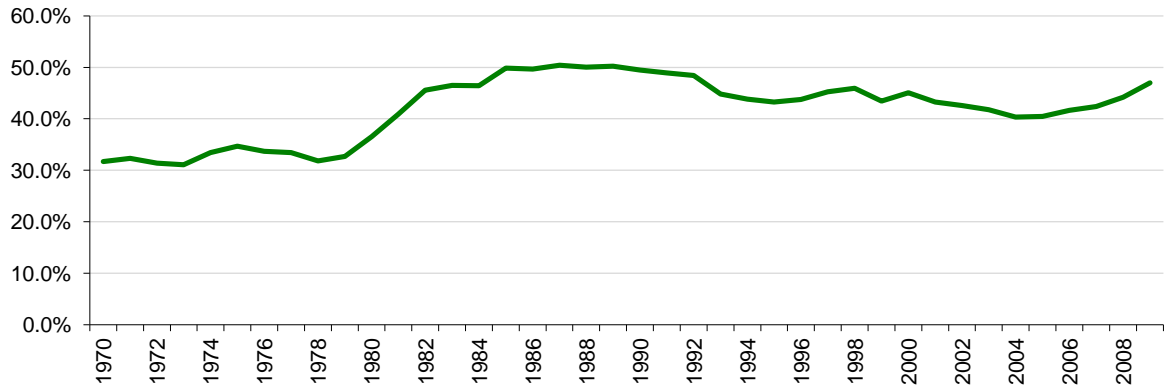
Chart 12: Components of Personal Income, Park County MT



Source: U.S. Department of commerce, 2011. Bureau of Economic Analysis, regional information system, Washington, D.C., Tables CA05 & CA05N

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Chart 13: Non-Labor Income Share of Total Personal Income, Park County MT



Source: U.S. Department of commerce, 2011. Bureau of Economic Analysis, regional information system, Washington, D.C., Tables CA05 & CA05N

Unemployment Rate

The unemployment rate in Gallatin County has changed dramatically in the past decade: by 2006, unemployment was at a low of 2.3%; by 2010, that number had climbed to 7.1%.

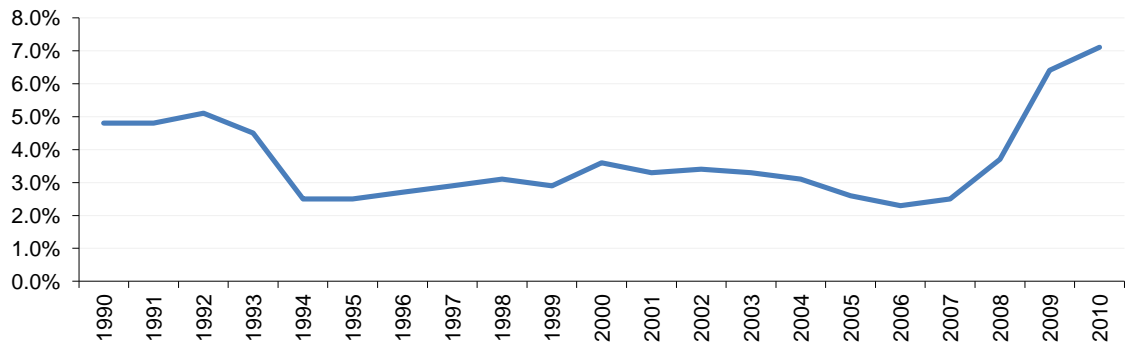
Table 4: Annual Average Labor Force – Gallatin County

Year	Labor Force	Employed	Unemployed	Unemployment Rate
2010	47,965	44,543	3,422	7.1%
2009	48,394	45,295	3,099	6.4%
2008	50,842	48,937	1,905	3.7%
2007	50,415	49,177	1,238	2.5%
2006	49,123	48,013	1,110	2.3%
2005	46,233	45,011	1,222	2.6%

Source: Montana Department of Labor and Industry, Research and Analysis Bureau 2012

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Chart 14: Average Annual Unemployment Rate, Gallatin County MT



Source: U.S. Department of Labor 2011. Bureau of Labor Statistics, Local Area Unemployment Statistics, Washington, D.C.

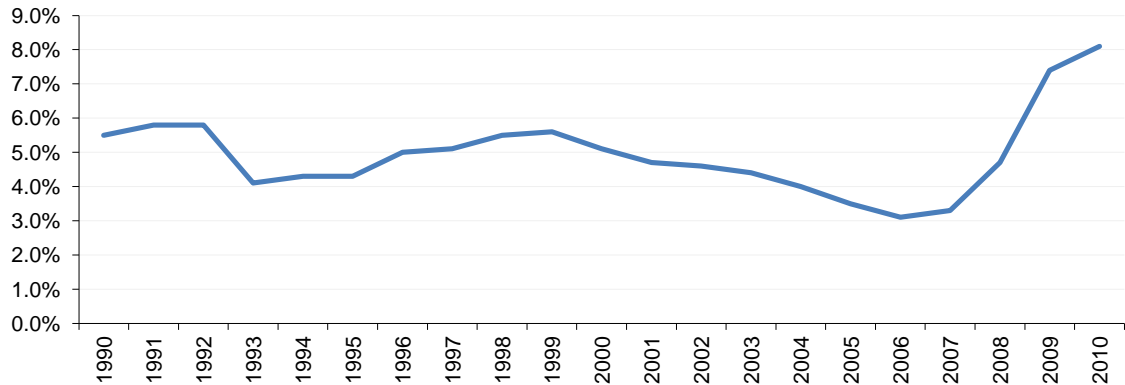
The unemployment rate in Park County changed dramatically between 2005 and 2010, correlating significantly with the recession that began in 2008. In 2006, unemployment was at a low of 3.1%; by 2010, unemployment had increased to 8.1%.

Table 5: Average Annual Labor Force – Park County

Year	Labor Force	Employed	Unemployed	Unemployment Rate
2010	8,357	7,680	677	8.1%
2009	8,502	7,881	626	7.4%
2008	9,014	8,591	423	4.7%
2007	9,073	8,771	302	3.3%
2006	9,213	8,930	283	3.1%
2005	8,916	8,600	316	3.5%

Source: Montana Department of Labor and Industry, Research and Analysis Bureau 2012

Chart 15: Average Annual Unemployment Rate, Park County MT

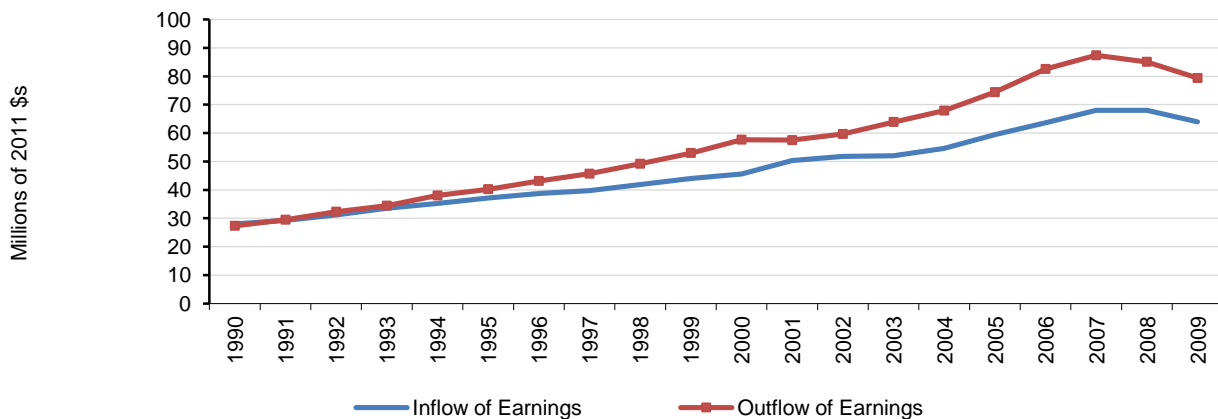


Source: U.S. Department of Labor 2011. Bureau of Labor Statistics, Local Area Unemployment Statistics, Washington, D.C.

Commuting Patterns

Inflow and outflow of earning patterns show that, since 1990, Gallatin County has seen an increasing number of commuters who work in Gallatin County but live in surrounding counties. Two factors contribute to this: first, the City of Bozeman is a major economic hub in the area, with regional employers such as Montana State University and Bozeman Deaconess Hospital; second, the price of housing has also risen substantially in the past decade, causing many employees to seek lower housing costs in neighboring counties.

Chart 16: Inflow & Outflow of Earnings, Gallatin County MT

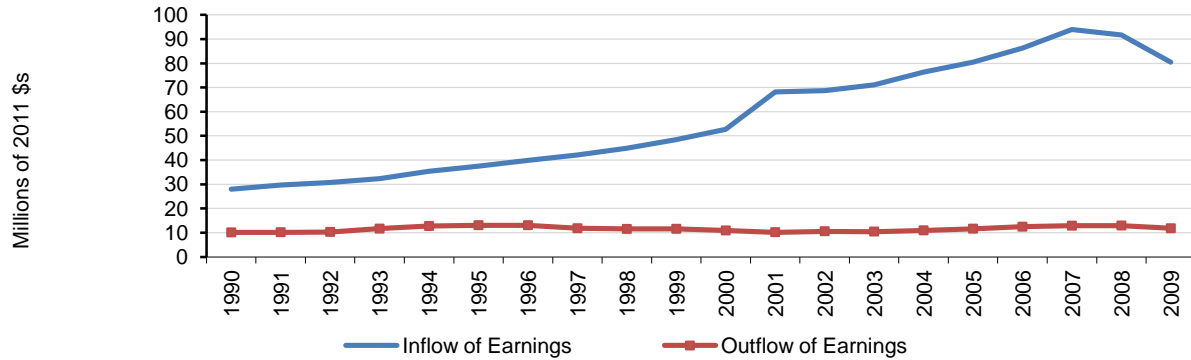


Source: U.S. Department of commerce, 2011. Bureau of Economic Analysis, regional information system, Washington, D.C., Tables CA30 & CA091

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Inflow and outflow of commuting patterns show a significant increase in Park County residents earning income outside the county. The data illustrate this trend. From 1990 to 2009, inflow of earnings grew from \$28.0 million to \$80.5 million (in real terms), a 187 percent increase.

Chart 17: Inflow & Outflow of Earnings, Park County MT

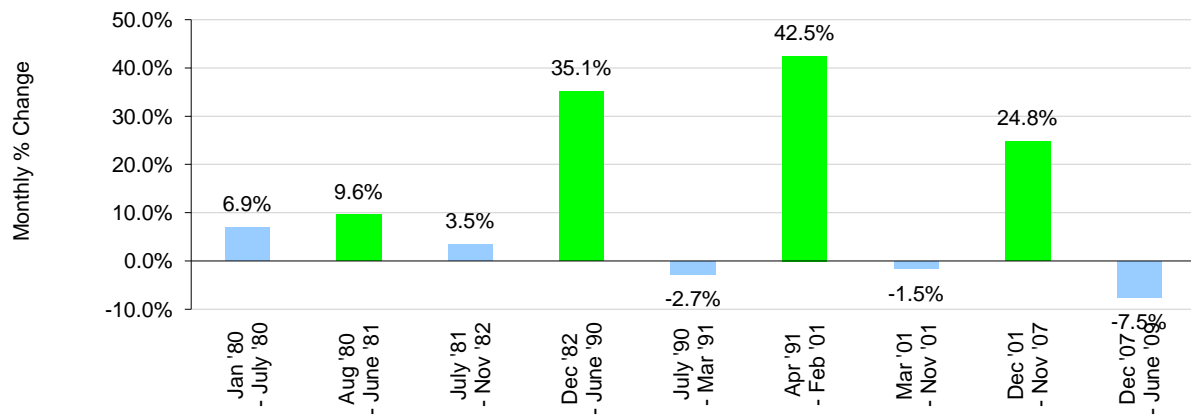


Source: U.S. Department of commerce, 2011. Bureau of Economic Analysis, regional information system, Washington, D.C., Tables CA30 & CA091

Employment Change during National Recessions

In the five national recessions since 1980, the two and a half year period between December 2007 and June 2009 had the greatest job loss for Gallatin County: employment dropped by 3,668 jobs, a 7.5% monthly loss. Other data reference above noted significant job losses in the service (including real estate and construction) industry during the past decade. These figures point to a possible over-reliance on these industries and a need to diversify the Gallatin County economy.

Chart 18: Employment Change During Recessions & Recovery Periods, Gallatin County MT

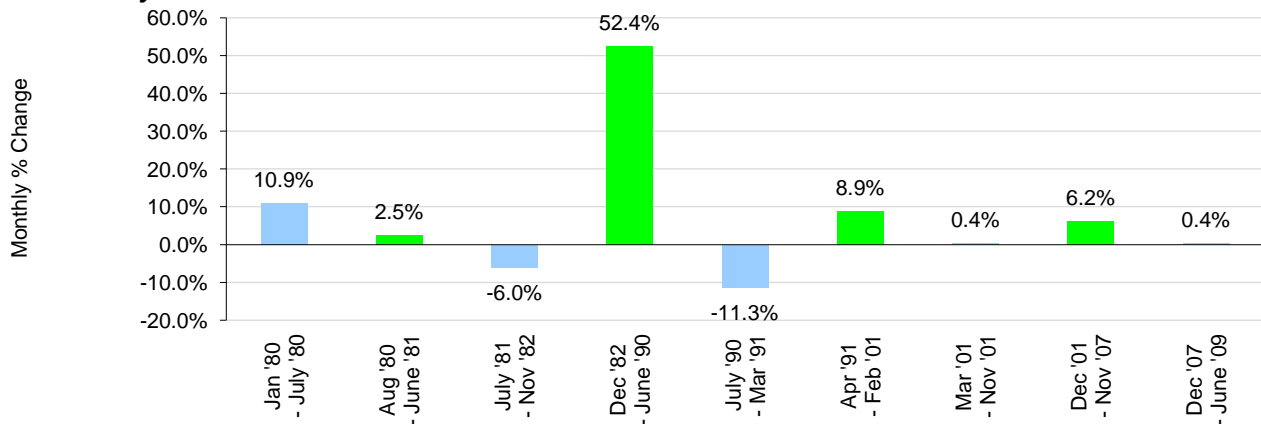


Sources: U.S. Department of Labor, 2011. Bureau of Labor Statistics, Local Area Unemployment Statistics, Washington, D.C.; National Bureau of Economic Research, 2009. U.S. Business Cycle Expansions and Contractions, Cambridge, MA.

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In the five national recessions since 1980, the most recent (December 2007-June 2009) had low job loss (only 0.4% of jobs were lost). In contrast, both the periods of January to July 1980 and July 1990 to March 1991 resulted in over 10% job loss. The primary different in this most recent recession is that, unlike the previous four recessions, job growth during the recovery period was strongly negative: 15% of jobs were lost between July 2009 and January 2012, making the period following the most recent recession the worst period for job loss in the past thirty years.

Chart 19: Employment Change During Recessions & Recovery Periods, Park County MT



Sources: U.S. Department of Labor, 2011. Bureau of Labor Statistics, Local Area Unemployment Statistics, Washington, D.C.; National Bureau of Economic Research, 2009. U.S. Business Cycle Expansions and Contractions, Cambridge, MA.

Comparisons with Montana

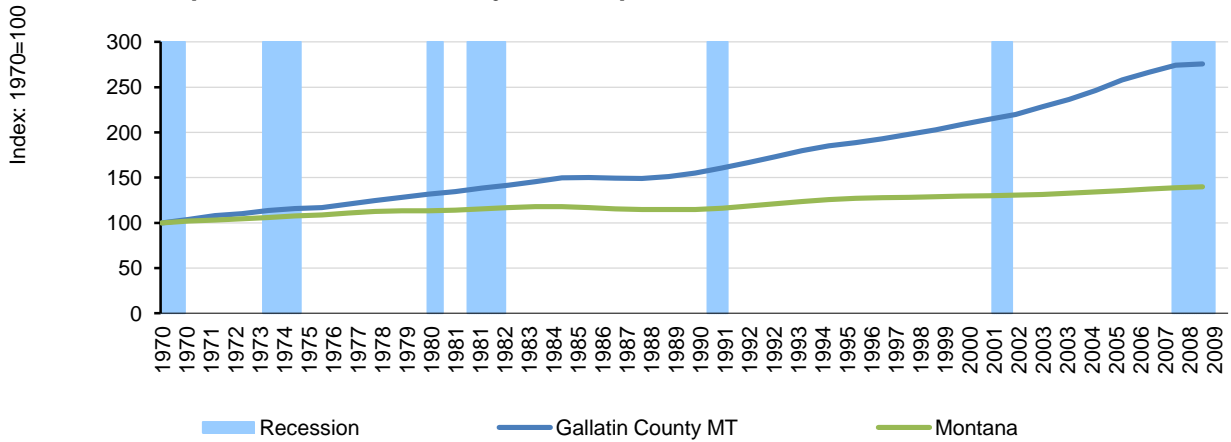
When compared with the state of Montana, Gallatin County shows several key differences in benchmark measures between 2000 and 2009. The population rate of Gallatin County rose 32%; population for the state rose 7.9%. Employment change within Gallatin County was also greater than the state: 27.6% versus 12.7%. The percent change for average earnings per job for Gallatin County, however, was less than the state (6.3% versus 9.7%), as was the change in per capita income (9.4% versus 19.1%). Likewise, the change in unemployment rate was greater in Gallatin County (an increase of 3.5%) than for the state as a whole (an increase of 2.1%).

Between 1970 and 2009, the following comparisons can be made between Gallatin County and the state of Montana:

The population of Gallatin County grew by 176%; the population of Montana grew by 40%:

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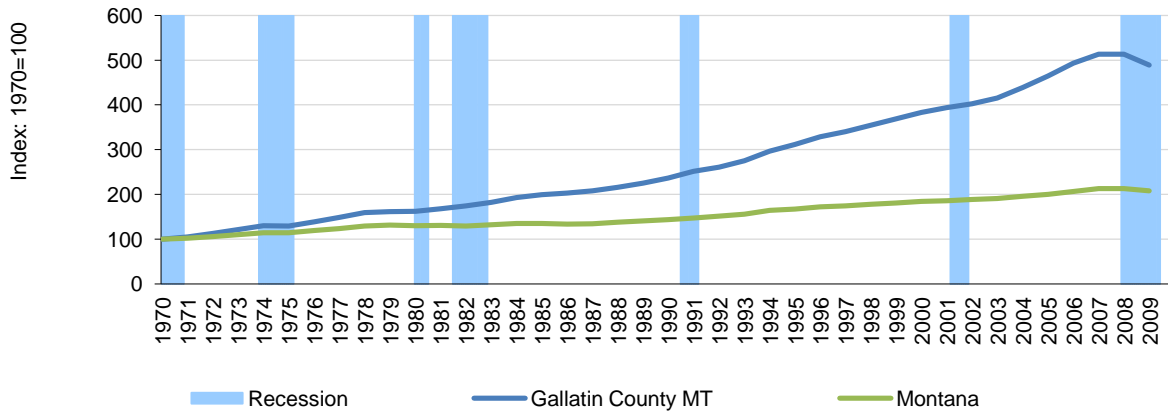
Chart 20: Population, Gallatin County MT Compared to Montana



Sources: U.S. Department of Commerce, 2011. Bureau of economic Analysis, Regional Economic Information Systems, Washington, D.C.; Table CA30

Employment in Gallatin County grew by 389% compared to 108% for Montana:

Chart 21: Employment, Gallatin County MT Compared to Montana

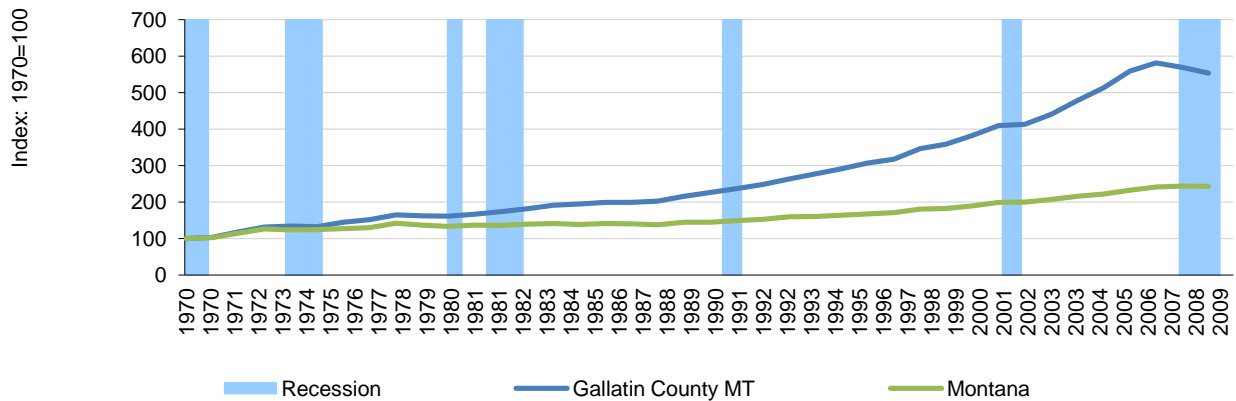


Sources: U.S. Department of Commerce, 2011. Bureau of economic Analysis, Regional Economic Information Systems, Washington, D.C.; Table CA30

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Personal income in Gallatin County grew by 453% compared to 143% in Montana:

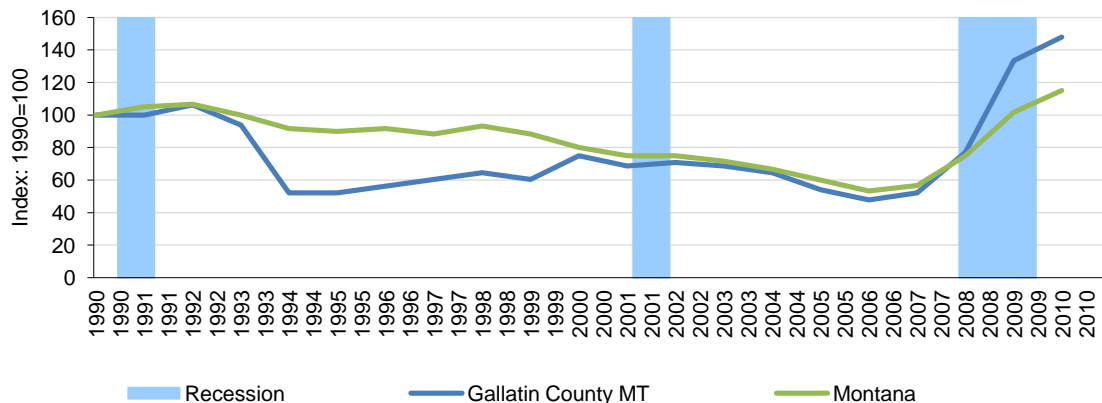
Chart 22: Personal Income, Gallatin County MT Compared to Montana



Sources: U.S. Department of Commerce, 2011. Bureau of economic Analysis, Regional Economic Information Systems, Washington, D.C.; Table CA30

The unemployment rate in Gallatin County was 7.1% in 2010 compared to 6.9 % in Montana:

Chart 23: Unemployment Rate, Gallatin County MT Compared to Montana

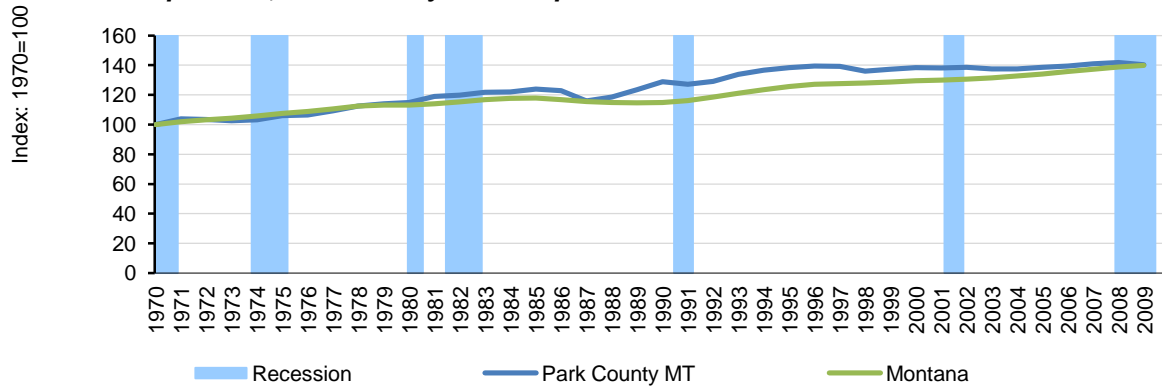


Sources: Bureau of Labor Statistics, Local Area Unemployment Statistics, Washington, D.C.

When compared with the state of Montana, Park County shows several key differences in benchmark measures between 2000 and 2009. Park County's population grew significantly less than state of Montana during this period: Montana's population grew 7.9%, while Park County grew only 1.4%. Employment change in Park County at 8.5% was also less than the state rate of 12.7%. Montana as a whole also exceeded Park County in the percentage growth of average earnings per job, 6.0% to 9.7%, respectively. Park County's growth in per capita income, however, outpaced the state 25.7% to 19.1% in per capita income. The increase in the unemployment rate was also greater in the county at 3.0% than in the state as a whole at 2.1%.

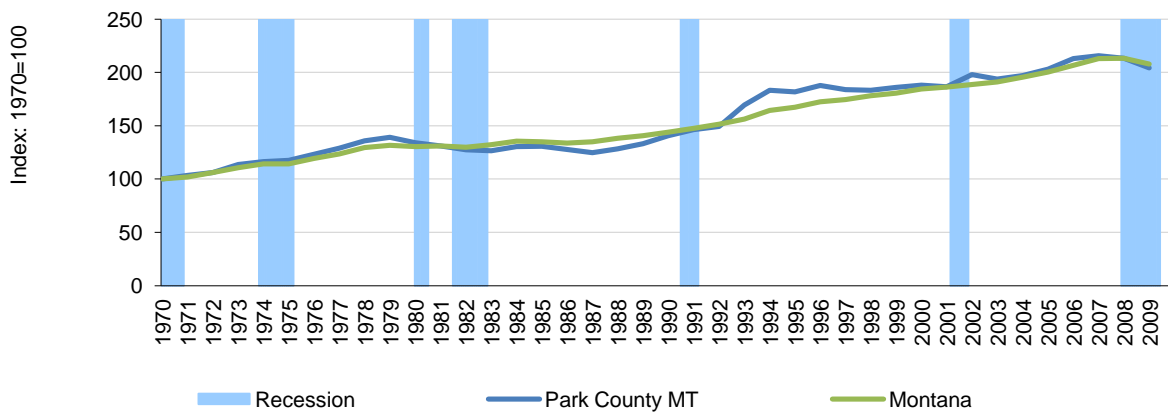
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Chart 24: Population, Park County MT Compared to Montana



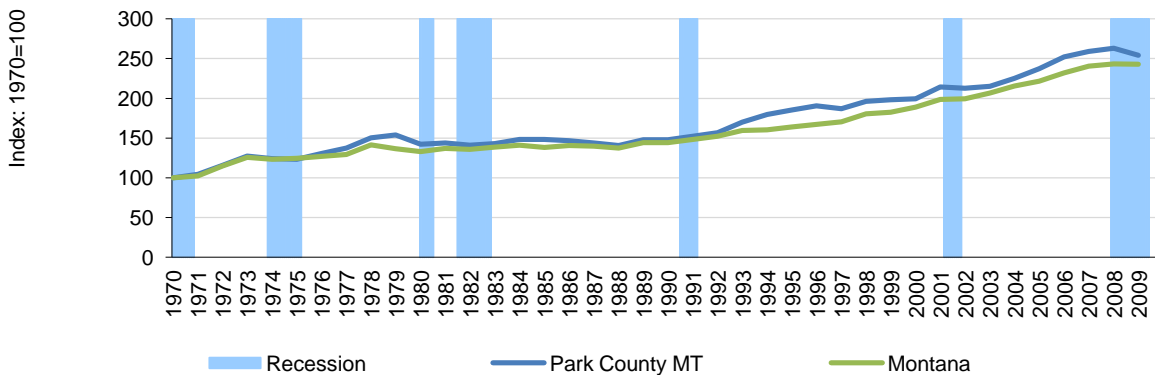
Sources: U.S. Department of Commerce, 2011. Bureau of economic Analysis, Regional Economic Information Systems, Washington, D.C.; Table CA30

Chart 25: Employment, Park County MT Compared to Montana



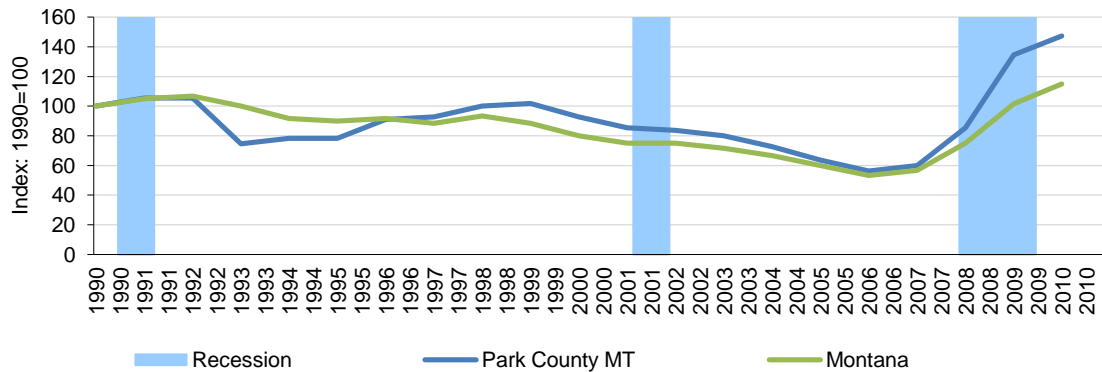
Sources: U.S. Department of Commerce, 2011. Bureau of economic Analysis, Regional Economic Information Systems, Washington, D.C.; Table CA30

Chart 26: Personal Income, Park County MT Compared to Montana



Sources: U.S. Department of Commerce, 2011. Bureau of economic Analysis, Regional Economic Information Systems, Washington, D.C.; Table CA30

Chart 27: Unemployment Rate, Park County MT Compared to Montana



Sources: U.S. Department of Commerce, 2011. Bureau of economic Analysis, Regional Economic Information Systems, Washington, D.C.; Table CA30;

D. Existing Business, Industry Base, and Regional Clusters

Within the District, the Government Sector (including the University) provided the highest number of jobs in 2010, followed closely by retail trade. There was some variation between counties, reflecting the employment opportunities provided by MSU and Bozeman Deaconess Hospital in Gallatin County and the tourist industry in Park County.

The economist Michael Porter coined the term “industry cluster” in his book *The Competitive Advantage of Nations* (1990). We build on his concept of industry clusters as a groups of interrelated businesses and industries, on different parts of the value chain, which drive wealth creation in a region primarily through imports and exports. We include in this definition industries and businesses that provide supporting services and specialized infrastructure to the primary players of a cluster. Cluster industries are geographically concentrated and inter-connected by the flow of goods and services, which is potentially stronger than the flow linking them to the larger economy.

Existing clusters within Gallatin and Park County have been identified through a combination of data from sources such as the U.S. Census and the Bureau of Labor Statistics and the surveys, community CEDS meetings, and business interviews conducted over the course of 2012. Those clusters are all described in detail below; in short, they include:

- Technology (including industries such as the biosciences and the optics industries);
- Retail (including the thriving retail centers in Bozeman and the central business districts found throughout the District);
- Construction, housing, and real estate (including not only construction real estate firms but also the myriad professional services such as architecture, engineering, legal, and financial services that have been a part of the District’s growth for the past 40 years);
- Tourism (including not only the hospitality industry but also the three ski resorts and the guiding and outfitting industries focusing on the District’s public lands);

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- Government (including not only local, state, and federal government offices that employ a significant number of District residences but also Montana State University, the District’s largest employer);
- Health Care (including Bozeman Deaconess, the region’s second largest employer, as well as the numerous social service practitioners and private practitioners throughout both counties);
- Manufacturing (including the more than 250 small manufacturing firms found within the District);

It is important to note that many of the businesses in the clusters noted above cross boundaries with other sectors. The financial sector, for example, has a large number of local banks that employ many people across the District; those financial organizations, however, are closely tied in with every other sector by financing business activities across the District.. Likewise, the technology cluster includes a significant number of optics and laser companies; many of the larger optics companies, however, include some of the largest companies in the manufacturing cluster. Finally, the outdoor products industry, a strong presence in the District’s manufacturing cluster, is located here because of the proximity to public lands that make the District such an attractive place to live.

These clusters have been described in the sections below; strategies addressing cluster and industry development have been detailed in the strategies listed in Chapter 4.

Table 6: Gallatin County Employment 2010

Rank	Sector	Number of Establishments	Average Annual Employment	Annual Wages Per Job
1	Government	103	7,608	\$40,319
2	Retail Trade	551	6,548	\$25,377
3	Accommodation and Food Services	367	5,322	\$14,952
4	Health Care and Social Assistance	368	4,033	\$38,552
5	Construction	908	3,285	\$39,937
6	Professional and Technical Services	784	3,094	\$56,964
7	Manufacturing	199	2,244	\$38,004
8	Other Services (repair, laundry, membership organizations, etc.)	383	1,468	\$25,713

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9	Wholesale Trade	236	1,348	\$43,167
10	Finance and Insurance	211	1,284	\$55,429
11	Arts, Entertainment, and Recreation	153	1,244	\$23,144
12	Administrative and Waste Services	305	1,209	\$27,763
13	Transportation and Warehousing	109	921	\$28,140
14	Real Estate and Rental and Leasing	322	856	\$27,467
15	Information	85	559	\$40,771
16	Educational Services	66	520	\$17,976
17	Agriculture, Forestry, Fishing, and Hunting	79	483	\$25,198
18	Mining	14	202	\$60,071
19	Management of Companies and Enterprises	13	141	\$50,089
20	Utilities	10	*	*

Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Gallatin County.

Table 7: Park County Employment 2010

Rank	Sector	Number of Establishments	Average Annual Employment	Annual Wages Per Job
1	Accommodation and Food Services	109	1,182	\$15,499
2	Government	42	739	\$34,811
3	Retail Trade	97	646	\$22,383
4	Health Care and Social Assistance	46	626	\$36,706
		45		

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5	Other Services	70	354	\$24,191
6	Construction	119	296	\$32,040
7	Manufacturing	30	248	\$38,931
8	Finance and Insurance	28	164	\$36,172
9	Professional and Technical Services	76	161	\$37,533
10	Agriculture, Forestry, Fishing, and Hunting	37	154	\$26,904
11	Arts, Entertainment, and Recreation	52	132	\$18,502
12	Educational Services	13	107	\$22,923
13	Information	20	81	\$34,146
14	Administrative and Waste Services	37	67	\$31,667
15	Real Estate and Rental and Leasing	33	43	\$24,339
16	Utilities	7	43	\$53,296
17	Transportation and Warehousing	19	39	\$20,745
18	Wholesale Trade	16	33	\$45,442
19	Mining	4	*	*
20	Management of Companies and Enterprises	2	*	*

Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Park County.

The District has a rich diversity of small entrepreneurial enterprises in all sectors, ranging from construction and retail to services and technology. Many of these businesses employ fewer than five people, and many are one-person entities.

Montana has the highest level of entrepreneurial activity in the nation, according to a 2007 study by the Kauffman Foundation. According to the study, based on data from 1996-2006, Montana has 600 entrepreneurs per 100,000 residents, or 0.6%. In the national study, the two industries with the highest rates of entrepreneurial activity were construction and services. These national and statewide rates are

likely mirrored in Gallatin County's economy, where construction and services have been leading sectors.

The licensing and commercialization of MSU research and technology has been a significant contributor to many technology business startups in the District. Most of the more than 100 technology-based firms in the District – including those that have spun off from university research – employ fewer than 10 people.

The U.S. Small Business Administration (SBA)'s definition of *small business* varies depending on the annual sales and/or the number of employees in a specific industry (described by NAICS codes). By SBA standards, all businesses in Montana are classified as *small businesses*.

While data for the District was not available, according to 2006 business patterns data from the U.S. Census Bureau, 62% of Bozeman's 3,262 business establishments employ fewer than 5 people each, and nearly 80% employ fewer than 10 people. Only 1% of Bozeman's business establishments employ more than 100 people.

Technology

Home to more than 100 technology firms, the District has become the high-tech center of Montana. The District's technology sector has grown significantly since the 1990s and, today, is home to an estimated 20 firms engaged in laser optics and an estimated 33 firms engaged in biotechnology.

The District's technology sector now includes firms engaged in advanced manufacturing (an estimated 26 firms) and laser optics (an estimated 20 firms); information technology— application development, information technology services, software, Internet applications, telecom, etc. (an estimated 50 firms); biotech or bioscience (an estimated 33 firms); and agricultural, environmental, or miscellaneous activities (an estimated 14 firms). These firms for the most part are selling their goods and services entirely to customers located outside of Montana and many located outside of the U.S. These firms directly employ an estimated more than 3,000 individuals whose earnings are significantly higher than the county's annual average wage of about \$32,500. (Source: MSU Technology Transfer Office; Montana Department of Commerce).

Without a doubt, the concentration of research activity at Montana State University has fueled the development of technology-based companies clustered in Gallatin County and has been a significant contributor to the county's vibrant entrepreneurial technology economy. University technology transfer and commercialization activities have been driving economic development nationwide since the early 1980s when changes in federal legislation accelerated the process and increased incentives for collaboration between universities and industry. Montana State University has been no exception. According to the MSU Technology Transfer Office, technology developed at MSU has resulted in the spinoff of over 30 companies and licensing by over 37 companies in the Bozeman area and nearly 300 companies statewide. In 2009, MSU held 163 licenses for patents for innovations such as biological, chemical, and engineering processes and compounds, coatings for the space shuttle or pharmaceutical drugs. Of those 163 licenses, 60% are with Montana companies, many located in Bozeman.

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Retail

The District's retail sector has experienced significant growth in recent years. Retail is now Gallatin County's second largest employment sector and Park County's third. With the arrival of several national retail chains, Bozeman- Gallatin County is now a regional retail hub, attracting shoppers from many of the surrounding counties. Prior to the arrival of these stores in Bozeman, such as The Home Depot, Lowes, Bed, Bath & Beyond, and World Market, many people drove outside the District to Billings to shop at these stores. The influx of these additional shoppers has considerable economic impact on other retail and service sector businesses.

The Gallatin Valley Mall (GVM) is the only enclosed mall in the District and a welcoming portal for travelers coming to Bozeman from Yellowstone National Park. GVM houses 65 merchants, with nearly half being locally owned and operated, and provides employment to more than 800 workers. GVM is home to Hollywood Theaters, an 11-plex with HD and 3D features and the only movie theater in the Gallatin Valley. GVM attracts over 2,000 shoppers daily from a 100 mile radius that includes Helena, GVM's second largest shopper market.

Downtown Bozeman also provides a high quality downtown environment for tourists and residents alike. Downtown Bozeman sports a variety of shops, restaurants, and art galleries, and hosts a variety of events such as the Christmas Stroll, Bridal walk, Crazy Days, the Art Walk series, Music on Main, and the Cruisin' on Main car show. Shoppers can also take advantage of the Downtown Dollars program and formally support local downtown businesses.

Downtown Livingston also provides a vibrant downtown environment for both tourists and residents. The Vision Livingston Downtown Partnership coordinates with the City to facilitate infrastructure repairs; coordinate the Business Improvement District; coordinate and plan for professional marketing efforts; and plan for and provide economic development opportunities for downtown Livingston.

Table 8: Gallatin County Retail 2010

Industry	Number of Establishments	Average Annual Employment	Annual Wages Per Job
Total Retail Trade	551	6,548	\$25,377
Motor Vehicle Parts/Dealers	45	645	\$44,027
Furniture and home furnishing stores	49	391	\$25,831
Electronics and appliance stores	28	191	\$32,243
Building materials & garden supply stores	56	728	\$30,809

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Food and beverage stores	34	1,138	\$21,616
Health and personal care stores	26	168	\$26,011
Gasoline stations	40	428	\$19,213
Clothing and clothing accessory stores	66	419	\$16,706
Sporting goods, hobby, book, music stores	60	700	\$15,536
General merchandise stores	14	1,101	\$25,140
Miscellaneous store retailers	96	488	\$21,753
Non-store retailers	28	151	\$37,892

Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Gallatin County.

Table 9: Park County Retail 2010

Industry	Number of Establishments	Average Annual Employment	Annual Wages Per Job
Total Retail Trade	97	646	\$22,383
Motor Vehicle Parts/Dealers	9	53	\$25,756
Furniture and home furnishing stores	8	23	\$19,889
Electronics and appliance stores	1	*	*
Building materials & garden supply stores	9	52	\$23,722
Food and beverage stores	9	188	\$22,785

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Health and personal care stores	4	29	\$29,077
Gasoline stations	13	131	\$19,302
Clothing and clothing accessory stores	4	21	\$13,853
Sporting goods, hobby, book, music stores	12	42	\$21,564
General merchandise stores	2	*	*
Miscellaneous store retailers	22	56	\$19,549
Non-store retailers	5	17	\$39,883

Source: Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Park County.

Agriculture

Agriculture is an important component of the District’s economy and culture. According to the U.S. Department of Agriculture’s National Agricultural Statistics Service, the number of farms in Gallatin County dropped by less than 1% between 2002 and 2007; in Park County, the number of farms grew by 2%. The amount of acreage in farmland grew by 10% in Gallatin County and fell by 10% in Park County. The number of agricultural operators whose primary occupation was farming dropped by 21% between 2002 and 2007 in Gallatin County and 9% in Park County, while the operators who had other primary occupations rose by 21% in Gallatin County and 14% in Park County. Those involved in farming throughout the District continued to get older, with the average age increasing in Gallatin County from 53.5 in 2002 to 57.2 in 2007 and from 55.7 to 58.2 in Park County during the same time.

Table 10: Gallatin County Agricultural Statistics

	2007 Census	2002 Census	% Change
Farms			
Farms (Number)	1,071	1,074	0%
Land in farms (acres)	776,868	708,728	10%
Average size of farms (acres)	725	660	10%
Median size of farms (acres)	70	125	-44%

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Farms by size (number)

Less than 1,000 acres	938	928	1%
1,000 acres or more	133	146	-9%

Farms by value of products sold (number)

Less than \$100,000	906	883	3%
\$100,000 or more	165	191	-14%

Farms by type of organization
(number)

Family, individual, partnership	944	1,000	-6%
Corporation, cooperative, trust	127	74	72%

Operator demographics

Primary occupation

Farming	448	559	-20%
Other	623	515	21%

Place of residence

On farm operated	904	943	-4%
Not on farm operated	167	131	27%

Years on present farm

Less than 10 years	289	354	-18%
10 years or more	782	720	9%

Age group

Under 55 years	452	614	-26%
55 years and over	619	460	35%

Average age of operators

57.2	53.5	7%
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Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Gallatin County.

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Table 11: Park County Agricultural Statistics	2007 Census	2002 Census	% Change
Farms			
Farms (Number)	535	527	2%
Land in farms (acres)	762,753	847,067	-10%
Average size of farms (acres)	1,426	1,607	-10%
Median size of farms (acres)	205	320	-36%
Farms by size (number)			
Less than 1,000 acres	387	360	8%
1,000 acres or more	148	167	-11%
<hr/>			
Farms by value of products sold (number)			
Less than \$100,000	462	467	-1%
\$100,000 or more	73	60	22%
<hr/>			
Farms by type of organization (number)			
Family, individual, partnership	450	474	-5%
Corporation, cooperative, trust	85	53	60%
<hr/>			
Operator demographics			
Primary occupation			
Farming	258	284	-9%
Other	277	243	14%
Place of residence			
On farm operated	439	465	-6%
Not on farm operated	96	62	55%
Years on present farm			
Less than 10 years	166	163	2%

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10 years or more	369	364	1%
Age group			
Under 55 years	220	256	-14%
55 years and over	315	271	16%
Average age of operators	58.2	55.7	4%

Source: Montana Department of Labor & Industry, February 2012. Economic and Demographic Information for Park County.

Tourism, Hospitality, Recreation, and Cultural Facilities

Tourism is a major component of the District’s economy. Yellowstone National Park, ski areas, and vast public lands draw people from all over the world to the District and its communities, some of which rely almost exclusively on the tourism and recreation industries to fuel economic growth. Residents of these communities assert that economic growth strategies should continue to focus on the outstanding recreational opportunities that are present.

There are many campgrounds, scenic areas and fishing accesses in the District. World-class fishing is found throughout the region, with rivers and streams designated as “Blue Ribbon” trout streams. Many of the best streams carry 3,000 fish per mile. The region is home to the Yellowstone cutthroat trout and to numerous unique spring creeks.

Golfing enthusiasts can enjoy a round at an Arnold Palmer designed golf course in Big Sky, as well as other courses in and around Bozeman. Cross country and downhill skiing are possible within the District, as well as snowmobiling, hiking, backpacking, camping, biking, fishing and river floating.

Glacier and Yellowstone National Parks are a tremendous draw for tourists both from the U.S. and abroad. Yellowstone National Park especially affects the District. The Bozeman Area Chamber of Commerce estimates that the direct impact of tourism on the Gallatin Valley economy is more than \$600 million annually, with more than 1 million visitors traveling through Bozeman each year. Tourism is one of the fastest growing sectors of Montana’s economy, according to the Montana Department of Commerce. More than 10 million visitors spent an estimated \$3 billion in Montana in 2008. Statewide, the hospitality, tourism, and recreation sector provides 48,580 jobs.

The District has a thriving arts and culture scene with many museums, galleries, practicing artists, live theater, and live music. The Emerson Center for the Arts is a hub of art and cultural activity. The Willson Auditorium hosts the Bozeman Symphony Society, The Intermountain Opera Association, and the Montana Ballet Company. The Ellen Theatre in downtown Bozeman is newly renovated and will host the Montana Theater Works live stage productions and will also be a venue for film screening for the Hatch Festival and the Bozeman Film Festival. The Sweet Pea Festival of the Arts, Music on Main, and the Downtown Art Walk series are prominent features of Bozeman’s summertime arts scene. Livingston has its own Livingston Depot Museum and the Yellowstone Gateway Museum, as well as a large artist community and 14 galleries owned and operated by regionally and nationally famous artists. Big Sky has recently begun its own summertime concert series, and multiple farmers markets operate throughout the county and provide venues for local growers as well as artists to market products locally.

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According to report on tourism in Montana conducted by the Institute for Tourism Recreation Research (ITRR) at the University of Montana, Non-labor income in Montana has increased significantly since 1958. As of 2005, Montana's non-labor income accounted for 35.7% of total personal income. Non-labor income makes up a larger percentage of total personal income in Montana than in the U.S., overall, or the Rocky Mountain region, collectively. Amenity-seeking migrants and retirees often bring non-labor income to the state which then circulates throughout the entire economy.

According to the ITRR, non-resident travel accounts for 7.5% of total employment (more than 45,900 jobs) in Montana. No-resident travel contributes jobs to every industrial sector, directly or indirectly. 12.5% of jobs in service sector industries are attributable to nonresident travel, and accounts for 11.6% of wholesale trade, 10.3% of retail trade, 8.4% of transportation and warehousing, and 4.5% of real estate rental and leasing.

According to the report, tourism has a sizeable impact on Montana's economy. Likewise, tourism fits in well with what appears to be important to many of the state's residents— open spaces, mountains, forests, rivers and lakes and wildlife. The number of non-resident visitors to Montana and their contribution to the economy in terms of expenditures continues to increase each year, a trend that is likely to continue, as long as the state continues to offer what many visitors are attracted to and what many of their activities revolve around—Montana's natural amenities (*Source: University of Montana Institute for Tourism and Recreation Research, The Changing Structure of Montana's Economy, July 2007*).

Profile of Montana Non-Resident Vacation Homeowners:

- Household income \$100,000+
- Mean age: 52
- Primary home in WA or CA
- Key attractions in MT: mountains, forests, open spaces, rivers, and family/friends
- Average length of stay: 10 nights
- 50% are former Montanans

Source: ITTR 2206

The Outdoor and Recreation Industry

The District has a thriving outdoor industry that serves both the tourist crowd as well as local residents. The outdoor recreation industry is made up of uses such as bicycling, camping, fishing, hunting, paddling, snow sports, hiking and trail use, and wildlife viewing, and Gallatin County has them all. A 2006 study by the Outdoor Industry Foundation found that the recreation industry contributes nearly \$730 billion to the US economy, supports nearly 6.5 million jobs across the US, generates \$88 billion in annual state and national tax revenue, generates \$289 billion annually in retail sales and services across the US, and touches one in 12 dollars circulating in the economy today (Outdoor Industry Foundation, 2006).

Hotel Room Tax

The State of Montana imposes two taxes on users of overnight lodging facilities (such as hotels, motels, campgrounds, guest ranches, etc.). The Lodging Facility Use Tax is 4% of the lodging charge and is collected by the owner or operator of the facility. Revenue collected from the 4% lodging facility use tax

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is deposited to a state special revenue fund and is used by the Department of Commerce for tourism promotion and promotion of the state as a location for the production of motion pictures and television commercials. Revenue collected from the 3% Lodging Facility Sales Tax is deposited into the state's general fund. (Source: *Montana Department of Revenue*).

Nearly two-thirds of all lodging sales in Montana occur within two of the state's six designated travel regions. More than 60% of the 2006 lodging taxes statewide were collected in Glacier Country (eight counties in the northwest, closest to Glacier National Park) and Yellowstone Country (five counties in the southwest, closest to Yellowstone National Park) regions due to the concentration of major attractions and lodging facilities in those regions.

The City of Bozeman is the largest city in the Yellowstone Country region. The table below shows the state lodging facility use tax collections ranked by tourism region for 2006.

Table 12: Lodging Facility Use Tax (4%) Collections, 2006

Tourism Region	Amount	% of Total
Glacier Country	\$4,970,191	31%
Yellowstone Country (includes Gallatin County)	\$4,774,674	30%
Custer Country	\$2,628,445	16%
Gold West Country	\$1,978,554	12%
Russell Country	\$1,461,640	9%
Missouri River Country	\$282,672	2%
Montana statewide	\$16,096,176	100%

Source: MT Dept of Commerce, Montana Tourism and Recreation Strategic Plan 2008-2012

Accommodation and Food Services

According to the Montana Department of Labor and Industry, in the 4th quarter of 2010 there were 367 food service or accommodation establishments in Gallatin County with total employment of 5,322 and an average wage of \$14,592. In Park County, there were 109 food service or accommodation establishments with total employment of 1,182 and an average wage of \$15,499.

Yellowstone National Park

Yellowstone National Park was established in 1872 as the world's first National Park. Yellowstone National Park is larger than Rhode Island and Delaware combined. Montana, Wyoming, and Idaho can each claim the park is within its borders.

Yellowstone National Park has a tremendous economic impact on Montana and the communities surrounding it. Some \$1.5 billion from tourism and services relating to the park is distributed into the

regional economies of its bordering states. The communities outside of the park also provide valuable services that cannot be provided within the park boundaries, including overflow campgrounds, hotels, dining facilities, shopping, and housing for employees. In the future, Yellowstone National Park will continue to be an employer, service industry support generator and an avenue for financial growth in both Gallatin and Park counties.

Yellowstone National Park has recently been recognized for its leadership in implementing recycling and waste reduction. In addition, YNP has recently converted its fleet of park vehicles to bio-diesel fuel and park concessionaires have followed.

Although Yellowstone National Park is primarily located in Wyoming, approximately 65% of park visitors enter the park via a Montana entrance during their trip. Visitation to the park grew throughout the past decade, with 2010 seeing record numbers of visitors.

Since the mid-1960s, at least 2 million tourists have visited the park almost every year. At peak summer levels, 3,700 employees work for Yellowstone National Park concessionaires. Concessionaires manage 9 hotels and lodges, with a total of 2,238 hotel rooms and cabins available. They also oversee gas stations, stores and most of the campgrounds. Another 800 employees work either permanently or seasonally for the National Park Service.

Fly Fishing

The District’s rivers and fishing attract anglers worldwide. The numerous fly fishing guides/outfitters and fly shops in the two-county region are a good indicator of this popular sport. For every dollar spent by the Montana Fish, Wildlife and Park's Fisheries Program, more than \$11 is spent by anglers and on fish-related recreation, benefiting local communities and the state's economies.

Use of fishing access sites (FAS) declined from 2001 to 2005. In 2003, 53% of all fishing license purchasers were Montana residents (227,562, representing 33% of all adult Montanans), and 47% were nonresidents (200,647). However, nonresidents represented only 29% of total angler days (800,723), while Montanans represented 71% of total angler days. Guided fishing trips generated a combined economic impact for Montana of \$51.7 million. (Source: MT Fish, Wildlife, and Parks).

Skiing

Skiing in southwest Montana brings visitors from all over the world. Big Sky Resort, nestled in the southwest Rocky Mountains, offers world-class skiing and riding with over 400 inches of snow on average per year. At its highest point, Lone Peak, skiers stand at 11,166 feet. Big Sky had over 340,000 skiers this past year – its biggest numbers to date.

Table 13: Yellowstone National Park Visitors

Year	Number of Visitors
2011	3,394,326
2010	3,640,184
2009	3,295,187
2008	3,066,580
2007	3,151,343
2006	2,870,293
2005	2,835,649
2004	2,868,316
2003	3,019,376
2002	2,983,051

Source: National Park Service Public Use Statistics Office

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Big Sky Resort is the leading tourist destination in Montana and has had a significant impact on Gallatin County's economy since it opened in December 1973. The resort, located some 40 miles south of Bozeman in the Gallatin Mountain Range, was purchased by Boyne Resorts in 1976, an operator of ski and golf resorts throughout the U.S. The resort has grown significantly since its initial days, and the Big Sky area has seen considerable residential and commercial development (including development of both the Yellowstone Club and Spanish Peaks Resort) as a response beginning in the late 1990s and extending through the present.

Bridger Bowl is a nonprofit ski area 16 miles north of Bozeman. Bridger Bowl is a cornerstone for Bozeman's recreational community and a major contributor to southwest Montana's vibrant winter tourism economy. In the 2010-2011 ski season Bridger Bowl experienced its highest number of visitors on record as well.

Table 14: Big Sky Resort and Bridger Bowl Visitors:

Ski Season	Big Sky Resort Visitors	Bridger Bowl Visitors
2010-11	340,000	210,966
2009-10	297,000	199,061
2008-09	285,000	1,888,621

Source: Prospera Business Network 2011 Economic Profile for Gallatin and Park Counties

Outfitting

Outfitting is a significant contributor to Montana tourism, bringing high value, low impact visitors. In 2005, some 91,000 nonresidents visited Montana primarily for an outfitted trip. An additional 227,000 nonresidents added value to their vacation with a guided experience, confirming that the outfitting industry is a significant component of tourism in Montana. There were a total of 318,000 outfitted clients in 2005, as follows¹:

- 124,000 (39%) Rafting/floating/canoeing/kayaking
- 63,800 (20%) Fishing
- 45,100 (14%) Horseback riding
- 19,500 (6%) Hunting
- 18,000 (6%) Hiking or backpacking
- 48,270 (15%) Wildlife viewing, snowmobiling, wagon train, dog sled

Construction, Land Development, and Real Estate

The construction, land development, and real estate sector is a significant component of the District's economy; the sector's boom leading up to 2005-2006, and its subsequent decline, have had a strong

¹ Source: University of Montana, Institute for Tourism and Recreation Research.

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impact on the local economy. Everything from building contractors, subcontractors, and trades; building materials suppliers, home furnishings, and landscaping; to realtors and financial institutions are impacted by the national recession and its impact locally on the construction industry in the District.

The development boom of the early 2000s changed the landscape of the District. The recession beginning in 2008 erased much of the economic gains within the construction and development sector: between 1990 and 2000, for example, Park County's construction sector grew by over 100%. The next decade, however, saw an increase of less than 1%. The numbers were less dramatic in Gallatin County but still showed severe impact: the number of construction jobs between 1990 and 2000 increased by 168%; between 2001 and 2009, however, the number had dropped to 25%. Construction activity in Gallatin County declined by 37% between 2007 and 2009, and single family housing starts declined 73% between 2004 and 2010 (Montana Business Quarterly, April 2012).

Manufacturing

The District has over 260 firms engaged in manufacturing activities as of 2010. The majority of those firms (238) are in Gallatin County. In 2010, manufacturing employment in Gallatin County averaged 2,244; in Park County, employment averaged 248. The sector includes firms engaged in a diverse range of activities including the production of: wood furniture; athletic gear and apparel; pet toys and products; food and beverage; printed materials; fabricated metal products; and computer and electronic products, which we have included in the advanced manufacturing category of the technology sector. Many of these firms sell products around the country, with an increasing number that have started exporting their products around the world.

Finance and Professional Business Services

The District's finance and professional services sector has experienced tremendous growth in the last 30 years. According to Montana Department of Labor & Industry data from 2010, the finance & insurance and the professional & technical services sectors in the District employ 4,703 people working at an estimated 1,100 business establishments in these two sectors.

Table15: Bank Deposits in Gallatin County – June 2011

<i>Type of Institution</i>	<i>Number of Institutions</i>	<i>Number of Offices</i>	<i>Deposits as of June 30, 2011 (\$000)</i>
Commercial Banks	17	42	\$1,785,079
Savings Institutions	1	1	\$39,286
Total	18	43	\$1,824,365

Source: FDIC

Table 16: Bank Deposits in Park County – June 2011

<i>Type of Institution</i>	<i>Number of Institutions</i>	<i>Number of Offices</i>	<i>Deposits as of June 30, 2011 (\$000)</i>
Commercial Banks	5	8	\$305,892
Savings Institutions	0	0	0
Total	5	8	\$305,892

Source: FDIC

Non-Profit Organizations

The District has a thriving arts and cultural life. The many galleries located in the downtowns of both Livingston and Bozeman and the annual attendance at the Sweet Pea Festival, art walks, Montana Winter Fair, county fairs, farmers markets throughout the District, the Livingston Sustainability Fair, the Christmas Stroll, music and theatrical performances and other events shows the significant role of the arts and culture in the community. Less obvious is the financial and economic impact of the arts and cultural events. According to the Dept. Labor & Industry data, the arts and cultural industry in the District includes 64 establishments employing 168 people.

The size of the non-profit sector in the District is difficult to clearly define as the many non-profit organizations are classified under numerous NAICS codes by the U.S. Census Bureau. In order to estimate the size and determine the impact of this important sector, relevant lists of groups of these non-profit organizations were individually researched them to come up with an approximation of the aggregate size of this sector of the local economy.

The District has become a hub for northern Rocky Mountain and Yellowstone region conservation-focused non-profit advocacy organizations. The research of Montana State University, the quality of outdoor recreation in the area and the proximity to Yellowstone National Park all have contributed to the development of this collection of conservation-focused groups. According to research conducted for the 2009 Bozeman Economic Development Plan, this group of non-profits employs approximately 160 people in Bozeman. The total operating budgets of these organizations is estimated to be approximately \$17 million. The local economic impact of these organizations is amplified due to the funding structure for these organizations which relies heavily on revenues from outside the area, in the form of grants or donations.

Another group of the non-profits is the more traditional organizations focusing on a variety of human service functions, community development, and economic development. This group of non-profit organizations employs approximately 200 people in Bozeman as of 2009. Their annual operating budgets are estimated to be around \$14 million. The largest of these non-profits in Gallatin County is the Human Resource and Development Council which has 95 employees in Bozeman and operates in Gallatin, Park and Meagher counties.

E. Housing and Real Estate

As went the construction industry, the real estate market also slowed down for some time. However, the number of houses sold in 2010 is definitely showing improvement, compared to 2009 totals. Gallatin and Park counties, along with the cities of Bozeman, Belgrade and Livingston have all shown an increase in the number of homes sold in that particular area (Table 37).

Total dollar volume increased in Gallatin County, Bozeman, and Park County. However, Belgrade and Livingston’s totals have decreased since the previous year. These markets have shown a drop in the average price per home. Bozeman is the only market that increased in average price of homes sold, but only by about two percent. Belgrade really suffered as average priced dropped 17 percent since 2009. Table 37 also demonstrates that Gallatin County and the City of Bozeman have remained consistent with its average days on market over the past three years. Belgrade’s timeline has improved by 11 percent while Park county and Livingston’s timeline of houses for sale on the market have increased by 12 and seven percent, respectively.

Table 17: Single Family Residences in Gallatin and Park Counties

Year	Number Sold	Total Dollar Volume	Average Price	Median Price	Days on Market
Gallatin County					
2008	744	\$318,659,630	\$428,306	\$285,850	116
2009	688	\$230,258,071	\$334,677	\$258,225	119
2010	796	\$262,760,063	\$330,101	\$244,000	117
Bozeman and Surrounding Area					
2008	502	\$206,974,405	\$412,300	\$308,850	108
2009	462	\$153,365,630	\$331,960	\$270,000	114
2010	530	\$178,756,270	\$337,276	\$262,000	110
Belgrade and Surrounding Area					
2008	158	\$47,430,925	\$300,196	\$226,750	106
2009	157	\$36,442,050	\$232,115	\$192,500	106
2010	163	\$31,409,503	\$192,696	\$174,000	94
Park County					
2008	123	\$34,753,357	\$282,548	\$221,000	125
2009	112	\$27,706,609	\$247,380	\$177,250	127
2010	138	\$30,672,750	\$222,266	\$169,000	144
Livingston and Surrounding Area					
2008	98	\$22,295,857	\$227,509	\$197,000	107
2009	91	\$16,352,243	\$179,695	\$164,500	113
2010	97	\$15,623,400	\$161,066	\$149,900	121

Source: Prospera Business Network

Due to the downturn of the housing economy, many houses were sold as short sales or were foreclosures. Both Gallatin and Park counties suffered considerably in the number of homes sold under distressed circumstances. Short sales were 7.67 percent, while foreclosures accounted for 18.38 percent of homes sold in 2010 for Gallatin County. Park County was a bit better off having 3.73 percent of homes sold as short sales but 18.63 percent went into foreclosure, slightly higher than Gallatin County (Tables 38 and 39).

Table 18: Residential Distressed Sales in Gallatin and Park County (Short Sales)

Year	Number Sold	Total Dollar	Average Price	Median Price	% of Total
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		Volume		Sales	
Gallatin County					
2009 (partial data)	27	\$6,580,100	\$243,707	\$190,000	2.61%
2010	91	\$20,760,750	\$228,140	\$180,000	7.67%
Park County					
2009 (partial data)	1	\$219,900	\$219,000	\$219,000	.72%
2010	6	\$1,423,000	\$237,167	\$175,000	3.73%

Source: Prospera Business Network

Table 19: Residential Distressed Sales in Gallatin and Park Counties (Foreclosures)

Year	Number Sold	Total Dollar Volume	Average Price	Median Price	% of Total Sales
Gallatin County					
2009 (partial data)	67	\$16,078,490	\$239,977	\$183,000	6.47%
2010	218	\$46,452,211	\$213,084	\$164,950	18.38%
Park County					
2009 (partial data)	8	\$904,000	\$113,000	\$112,000	5.80%
2010	30	\$3,302,203	\$110,073	\$89,950	18.63%

Source: Prospera Business Network

Despite the number of short sales and foreclosures, both Gallatin and Park Counties experienced growth in the number of houses sold in 2010 from 2009. Gallatin had a 14 percent growth while Park had a 19 percent increase. Overall, from 2005 to 2010, Gallatin saw a 35 percent drop due the sinking housing market and Park had a 48 percent drop in the same timeframe (Chart 12).

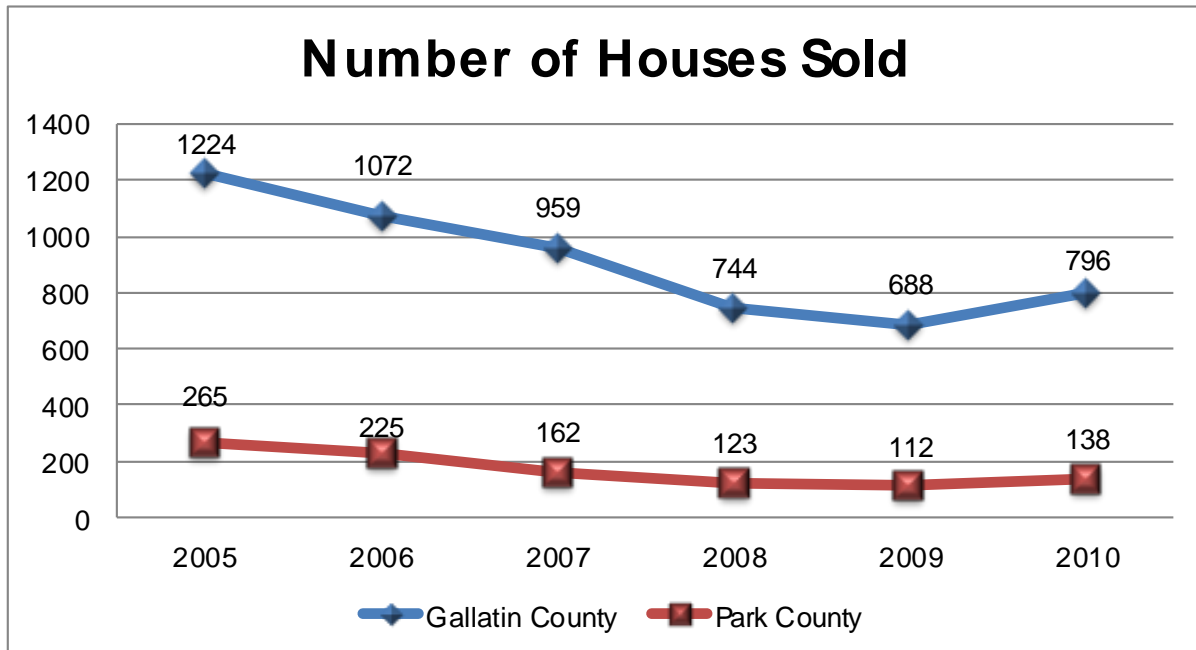


Chart 28: Number of houses sold 2005-2010, Gallatin and Park Counties

Source: Prospera Business Network

Since 2005, Bozeman faced a 35 percent drop in houses sold, while Belgrade had a 42 percent decline and Livingston suffered at a 54 percent fall. However, in 2010, these three cities saw increases from the previous year. Bozeman was up 13 percent; Belgrade experienced a 4 percent growth; and Livingston saw a 6 percent rise (Chart 13).

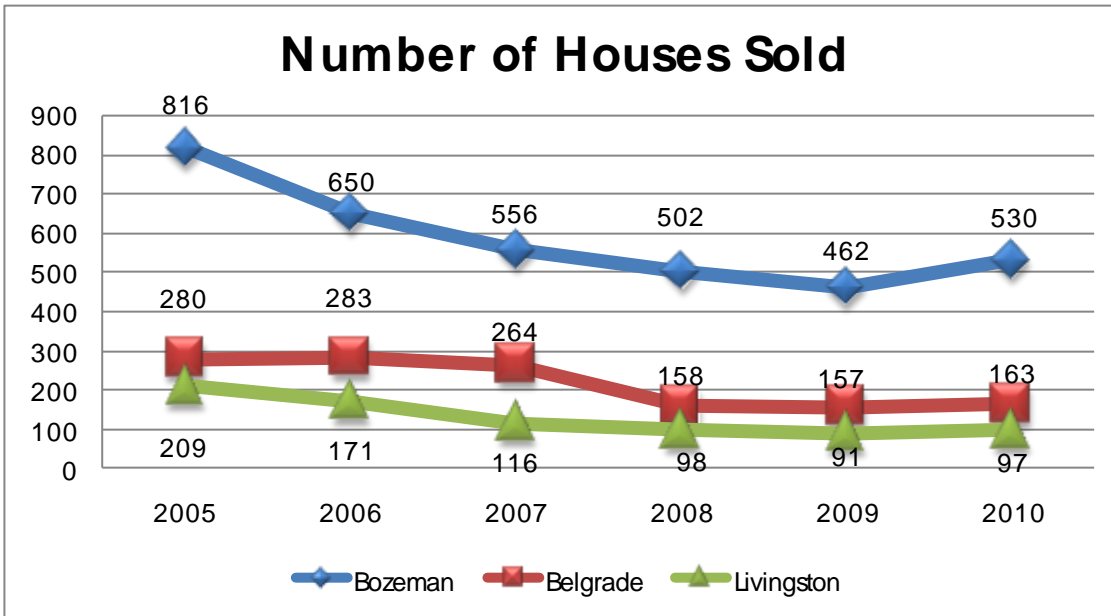


Chart 29: Number of houses sold 2005-2010, Gallatin and Park Counties
Source: Prospera Business Network

In 2011, there were an estimated 42,601 housing units in Gallatin County, an increase of 12,800 (45%) since 2000. Nearly 5,000 of those housing units were built in the city limits of Bozeman. While the decade shows significant impact in housing construction, the building industry has felt the impact of the recession. Between 2001 and 2007, 84% of the decade’s residential structures were permitted. Permits dropped precipitously in 2007; by 2011, only 199 residential building permits were issued (3% of the decade’s total).

	Bozeman (City)	County
Population	37,280	89,513
Households	15,775	36,550
Total housing units	17,464	42,289
Seasonal housing units	337	2,794
Occupied year-around housing units	15,775	36,550
Percentage vacant, year-around	7.7	7.0
Percent renter occupied	56.5	39.0

Source: City of Bozeman Affordable Needs

In 2010, there were 9,375 housing units in Park County up from 8,247 in 2000; this constituted a 14% increase over the decade. (U.S. Census. 2000. 2010.).

F. Health Care

The District has a strong health-care delivery system, with Bozeman Deaconess Hospital, Community Health Partners, Livingston Health Care, and a network of clinics and providers throughout both counties providing residents with outstanding care. Bozeman Deaconess Hospital, the major health facility and the largest private employer in the District, serves Gallatin County residents as well as many Park and Madison County residents. Originally located in downtown Bozeman, the hospital relocated to its current facility on Highland Boulevard in 1986. The 86-bed hospital provides inpatient and outpatient acute care services for medical, surgical, pediatric, obstetrical and gynecological patients. A cancer treatment facility was added in 1993. In 2010, highlights of Bozeman Deaconess Hospital included:

- 86 beds
- 162 medical staff and 38 health professionals representing 44 different specialties
- 790 full-time employees
- 245 casual-call employees
- 327 part-time employees

Communities throughout the District have a variety of clinics that provide care to individual residents. Livingston, Belgrade, Manhattan, Three Forks, and West Yellowstone all have walk-in clinics provide care to residents throughout the District. Community Health Partners have multiple offices in both counties.

Recently the City of Livingston gave a green light to a new \$44 million hospital campus on the City’s east side.

G. Telecommunications

While many of the urban areas of the District are well served with broadband coverage, many rural communities still operate with dial-up or lower capacity line of sight service. Even in the major metropolitan areas there are pockets of slow speed coverage. A study is underway to consider ‘dark fiber’ loop to better serve the City of Bozeman and its environs. The following table includes a list of providers in the District offering bandwidth services within the region as of 2011 (www.broadband.org, downloaded 6/26/12)

Table 21: Broadband Providers in Gallatin and Park Counties

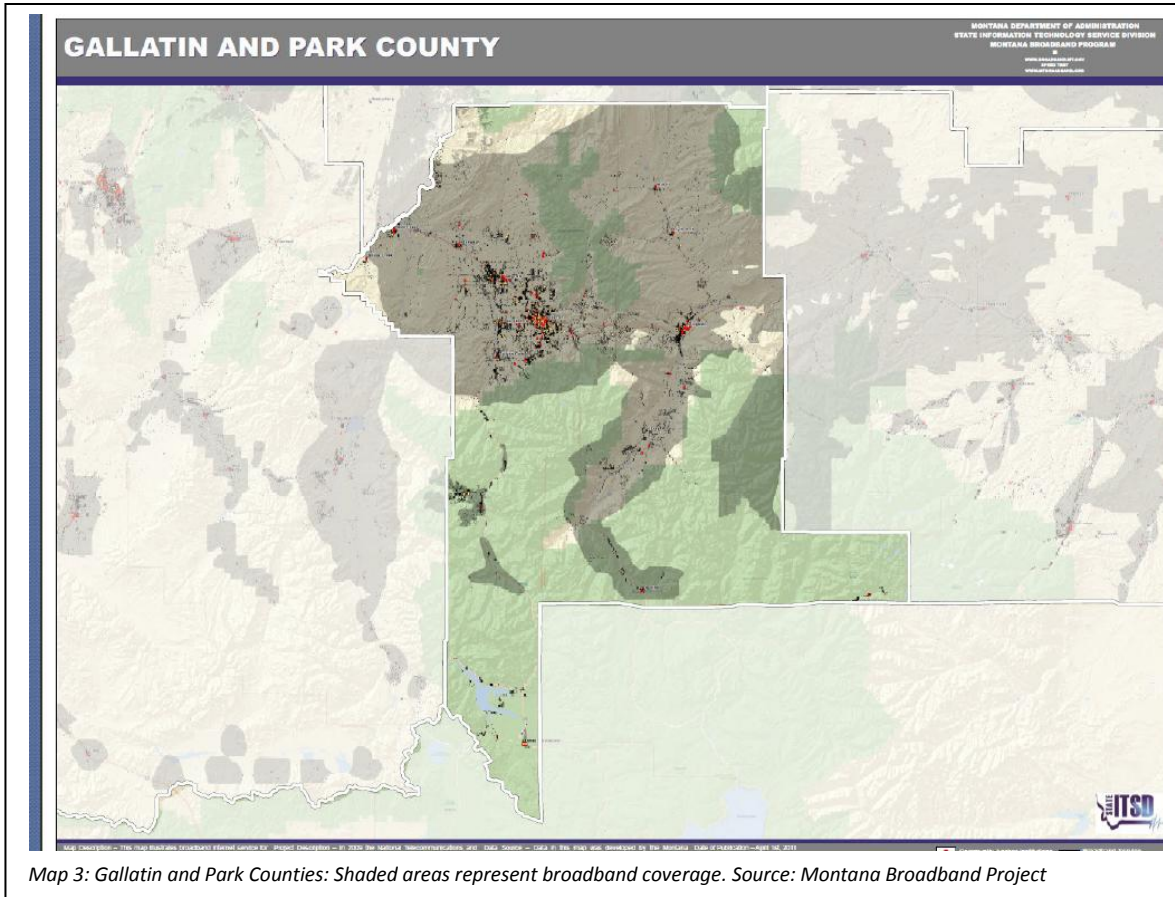
Provider	Type of Technology
AT&T Mobile LLC	Terrestrial mobile wireless
Bridgeband Communications, Inc.	Asymmetric xDSL

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Verizon Wireless	Terrestrial mobile wireless
Century Link	Asymmetric xDSL
Bresnan Communications	Cable modem – other
LAT, Inc.	Terrestrial fixed wireless – unlicensed
Wisptest.net	Terrestrial fixed wireless – unlicensed
3 Rivers Telephone Cooperative, Inc.	Asymmetric xDSL

According to a regional meeting held in Gallatin County on November 10, 2011, by the Montana Broadband Program, the following issues for broadband coverage were identified for the District:

- Schools have good broadband access but the budget for technology and for the cost to meet increasing bandwidth demand is an issue.
- Some students can't afford to have broadband at home; this presents an equity issue.
- Due to terrain and costs, it will not be feasible to deploy fiber everywhere. Wireless is an affordable solution for these areas.
- There is a need for more route diversity in the broadband network to get redundancy.
- Circuit costs are high compared to other states.
- Actual bandwidth speeds are less than advertised bandwidth. Peering arrangements between providers would improve this.
- Widespread mobile coverage is important. More mobile apps are being introduced and everyone wants mobile access all of the time.
- The hospital can provide telemedicine service but small towns and rural areas do not have the connectivity needed for these applications. Video requires higher bandwidth. There is a huge need for tele-mental health services which requires video.



H. Transportation and Transit Systems

Bozeman Yellowstone International Airport. The Bozeman Yellowstone International Airport has seen regularly increasing deboardings, with 2011 reaching a record of 398,288 (only 4,000 less than Billings).

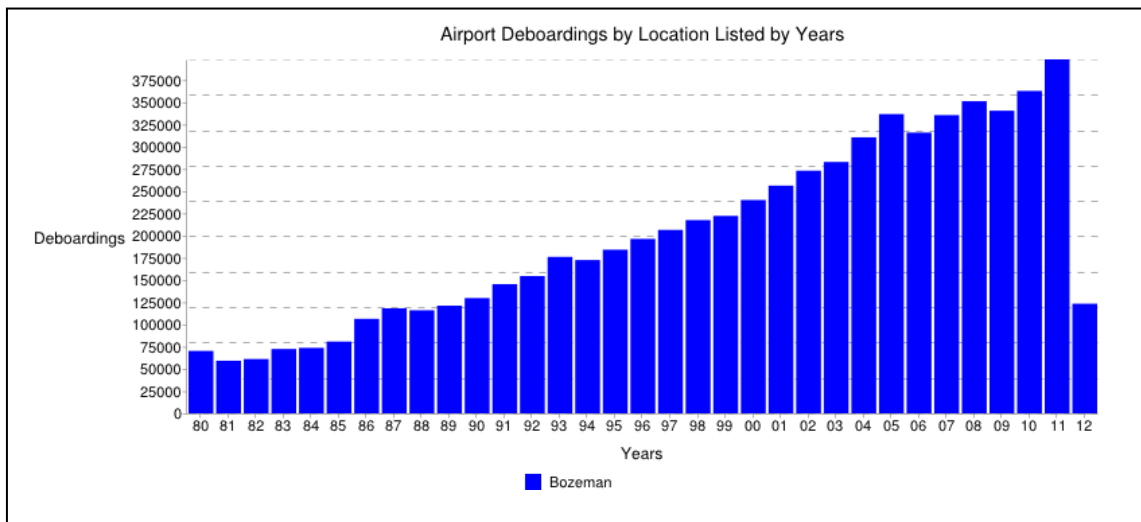


Chart 30: Airplane Deboardings by Location Source: Bozeman Yellowstone International Airport

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In addition to increased deboardings, the airport itself has expanded. In 2011, the terminal expansion opened, adding 125,000 square feet, three additional gates, and an additional baggage claim carousel. Direct flights now provide daily or weekly flights to Denver, Salt Lake City, Seattle, San Francisco, Las Vegas, Phoenix, and Minneapolis/St. Paul, and seasonal direct flights to Portland, Atlanta, Chicago, and New York.

Bozeman Yellowstone International Airport is the only airport serving as a year-round entrance for two Yellowstone National Park entrances (Gardiner and West Yellowstone). The airport also serves Big Sky Resort, Moonlight Basin, and Bridger Bowl Ski Area.

Streamline Bus. Streamline bus began offering service in 2006 around Bozeman and the Gallatin Valley. Ridership has steadily grown, with 198,000 rides made in 2009, 233,000 in 2010, and 242,000 in 2011. Streamline gave its 1 millionth ride in 2011 and offers routes throughout the Gallatin Valley and to Livingston (www.streamlinebus.com), downloaded 6/26/12).

Rail and Road. The construction of Interstate 90 in the 1950s has had a significant impact on the growth and development of the District. I-90, under the jurisdiction of the Federal Highway Administration, transects the District and provides a major east-west corridor for traffic between Boston and Seattle. Likewise, numerous state highways also cross the District, and Montana Rail Link provides rail transportation east-west across the District.

In June 2012, Gallatin County was awarded a federal TIGER grant allowing completion of an airport interchange east of Belgrade along I-90. This interchange will provide better connection between the airport and other areas of the county, including Big Sky, and has the potential to provide significant economic opportunity in the form of initial construction jobs and subsequent business park development.

Additionally, the Northern Pacific Railroad follows the same route as I-90, currently providing the major rail link between the rapidly developing Bakken oil and natural gas fields in western North Dakota and Eastern Montana and markets along the Pacific Coast.

I. Education

The District as a whole has a high level of educational attainment, with 43.5% of residents in Gallatin County and 30.1% in Park County holding a Bachelor's degree or higher. This can be compared to the state of Montana (28.8%) and the rest of the nation (28.1%).

Schools. There are a total of 49 public schools in the District (14 in Park County and 35 in Gallatin County), including elementary schools, middle schools, and high schools. There are also numerous private schools that serve elementary and secondary students as well as a significant population of home-schooled students.

Table 22: Schools in Gallatin and Park Counties

Name	Address	Name	Address
Gallatin County Schools			
Manhattan Elementary	416 N. Broadway Manhattan	Martha Fox Heck School	308 N. Broadway Belgrade
Manhattan High School	416 N. Broadway Manhattan	Quaw Elementary	91 Southview Avenue Belgrade
Chief Joseph Middle School	309 N. 11 th Bozeman	Belgrade Intermediate School	421 Spooner Road Belgrade
Emily Dickinson School	2435 Annie Street Bozeman	Belgrade Middle School	400 Triple Crown Belgrade
Hawthorne School	114 N. Rouse Bozeman	Belgrade High School	303 North Hoffman Belgrade
Hyalite School	3600 W. Babcock Bozeman	Malmborg School	375 Jackson Creek Rd. Bozeman
Irving School	611 S. 8 th Bozeman	West Yellowstone Elementary	500 Delacy West Yellowstone
Longfellow School	516 S. Tracy Bozeman	Three Forks High School	210 East Neal Three Forks
Morning Star School	830 Arnold Bozeman	Pass Creek School	3747 Pass Creek Rd. Belgrade
Sacajawea Middle School	3525 South 3 rd Bozeman	Monforton School	6001 Monforton School Rd. Bozeman
Whittier School	511 N. 5 th Bozeman	Gallatin Gateway School	Gallatin Gateway
Bozeman High School	205 N. 11 th Bozeman	Anderson School	10040 Cottonwood Road Bozeman
Willow Creek School	Willow Creek	LaMotte School	841 Bear Canyon Rd. Bozeman
Springhill School	602 Springhill Community Rd. Belgrade	Cottonwood School	13233 Cottonwood School Bozeman
Three Forks Elementary	212 East Neal Three Forks	West Yellowstone High School	500 Delacy West Yellowstone
Manhattan Christian	8000 Churchill Road Manhattan	Ophir School	45465 Gallatin Road Gallatin Gateway
Headwaters Academy	418 West Garfield Bozeman	Amsterdam School	6360 Camp Creek Road Manhattan
Heritage Christian	4310 Durston Bozeman	Mount Ellis Academy	3641 Bozeman Trail Road Bozeman

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Gallatin-Madison Cooperative	21000 Frontage Rd. Belgrade	Great Beginnings Montessori	5860 Springhill Rd. Bozeman
Bozeman Christian School	1935 Nelson Rd. Belgrade	Pallas Athenas Montessori	4113 E. Valley Center Rd. Bozeman
Ridge View Elementary	117 Green Belt Dr. Belgrade	Sourdough Montessori School	4310 Sourdough Rd. Bozeman
Willow Creek Public School	407 Main Street Willow Creek	Greenwood Academy	2015 Wheat Drive Bozeman
Learning Circle Montessori	3001 W. Villard Bozeman	Petra Academy	100 Discovery Drive Bozeman
Learning Circle Montessori	516 W. Cleveland Bozeman	Carden School	111 Arrowhead Trail Bozeman
Bridger Alternative High School	404 W. Main Bozeman	Goodfriends Montessori	1572 Cobb Hill Rd Bozeman
Highland Montessori	111 Highland Blvd Bozeman	World Family School	120 E. Story Bozeman
Park County Schools			
Arrowhead School	Pray, MT	Cooke City School	Cooke City, MT
Gardiner School	Gardiner, MT	East Side	Livingston, MT
Winan's	Livingston, MT	Sleeping Giant Middle School	Livingston, MT
Park High School	Livingston, MT	Pine Creek School	Pine Creek, MT
Shields Valley School	Clyde Park, MT	St. Mary's School	Livingston, MT
Springdale School	Springdale, MT	Montessori Island School	Livingston, MT
Thomas More School	Emigrant, MT		

Montana State University

Bozeman is the main campus location for Montana State University (MSU), one of two state-run university systems in Montana. Approximately 12,000 students are engaged in study programs provided on the 1,170-acre campus. MSU offers baccalaureate degrees in 50 fields, master's degrees in 40 fields and doctorates in 13 fields. Major programs include engineering, business, education, health & human development, architecture, agriculture and basic sciences.

As a land-grant university, MSU has long supported basic and applied research, with many staff members holding joint appointments with affiliated research organizations. The average age of an undergraduate is 22 years old, while the average age of a graduate student is 32. Approximately 80% of undergraduate students receive financial aid, with an average total of \$4,000 per student from all aid sources¹⁶.

As stated by MSU, it has the distinguished reputation of being “designated as one of 108 research universities with ‘very high research activity’ by the Carnegie Foundation for the Advancement of Teaching. MSU offers significant opportunities for research, scholarship, and creative work. This highest tier classification — out of 4,400 institutions — distinguishes MSU as the only institution in the five-state region of Montana, Wyoming, Idaho, and North and South Dakota to achieve this level of research

prominence.” According to a 2010 publication from MSU, the university has broad economic impact on Gallatin County. More than 9,000 jobs are present in the county because of MSU, with almost three-quarter billion dollars in earning attributable to the university (MSU Economic Impact Report 2010).

MSU has been an economic anchor to the regional economy for many decades. Providing education on four campuses (Bozeman, Billings, Havre and Great Falls), as well as Montana Agricultural Experiment Stations and county Extension offices, research and outreach, MSU makes significant contributions to Montana’s economy. According to the MSU 2010 Economic Impact Report, as a result of the presence of the MSU system statewide (excluding MSU Extension):

- 13,511 Montana jobs are available statewide.
- More than \$897 million in after tax, personal income is generated.
- Montana receives \$2.60 in tax revenues for every \$1 of tax support.
- The presence of MSU increases annual wages in Montana by \$1,087.
- An increase of \$349.3 million in investment spending in Montana’s economy occurs due to MSU.

As of fall 2010, MSU employed 2,975 permanent positions, along with 551 graduate students as teaching and/or research assistants. MSU is the region’s largest employer.

Table 23: MSU Enrollment – Fall 2011

Region of Origin	Undergrad	Graduate	Total	%
Montana	7,833	979	8,812	62%
Other U.S.	3,992	885	4,877	35%
Foreign	363	101	464	3%
Total	12,188	1,965	14,153	100%

Source: Montana State University

Gallatin College. Our region’s comprehensive two-year college is housed at Montana State University and offers workforce courses in aviation, bookkeeping, design drafting technology, interior design, medical assistanceship, and welding technology. A study commissioned in 2011 for Gallatin College identified the health care and restaurant/hospitality sectors as being in high need of associate and certificate programs.

Interest in Gallatin College has been growing rapidly. Enrollment increased 22% between the 2010-2011 school year and the 2011-2012 school year. Students can earn associate of applied science degrees in interior design, design drafting, and aviation; certificates of applied science in welding, bookkeeping, and medical assistant; and certificates in residential building performance (weatherization). The College also started providing general education courses in the fall of 2012. These courses lead to the Associate of Arts or Associate of Science Degrees and provide a path for students interested in transfer to a four-year university. Gallatin College has 12 full-time faculty and 25 adjunct faculty, with workforce instructors coming from industry.

Distance Learning

Distance learning is available in Gallatin County through the Bozeman Tech Center and Montana State University. Classes can be taken through the Burns Telecommunication Center or over the internet. The

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courses can be either completely online or hybrid “mixed-mode” courses. These combine both an online component and scheduled face-to-face classes in a classroom setting. Students enjoy the flexibility and convenience of an online course as well as the benefits of meeting together for interactive classroom instruction.

J. Public Services

Critical Services and Facilities

Gallatin County and the incorporated communities within them have a variety of law enforcement, fire department, and emergency services. The following tables demonstrate the breadth of service providers throughout Gallatin County.

Table 24: Critical Services and Facilities, Gallatin and Park Counties

General Resources – Gallatin County			
Name	Address	Name	Address
Law & Justice Center	615 S. 16 th Bozeman	Montana State University Police	Roy Huffman Building, 7 th & Kagy, Bozeman
Gallatin County Courthouse	311 West Main Bozeman	Gallatin County Coordination Center	219 East Tamarack Bozeman
Bozeman City Hall	121 North Rouse Bozeman	Gallatin County Emergency Communications Center	1705 Vaquero Parkway Bozeman
Gallatin County Fairgrounds	901 North Black Bozeman	Belgrade City Hall	91 E. Central Belgrade
West Yellowstone Police	124 Yellowstone Avenue West Yellowstone	Manhattan City Hall	120 West Main Manhattan
Three Forks City Office	206 Main Three Forks		
General Resources – Park County			
Park City-County Complex	414 E. Callender Street, Livingston	Clyde Park Town Hall	516 Miles Avenue, Clyde Park
Park County Sheriff		Livingston Police Department	
Park County Fairgrounds		Sheriff’s Office in Gardner	
Critical Facilities - Fire and EMS Stations – Gallatin County			
Bozeman Fire Department Station #1	34 N. Rouse Bozeman	Central Valley Fire #2	3650 Springhill Rd. Belgrade
Bozeman Fire Department Station #2	410 S. 19th Bozeman	Central Valley Fire #3	275 Ice Center Rd. Bozeman
Bozeman Fire Department Station #3	1705 Vaquero Parkway, Bozeman	Central Valley Fire #4	13500 Springhill Rd Belgrade
Amsterdam Volunteer	7170 Church Hill Rd.	Central Valley Fire #5	9600 Walker Rd

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Fire	Amsterdam		Belgrade
Central Valley Fire #1	205 E. Main Belgrade	Sourdough Fire	4541 S. 3 rd Bozeman
Bridger Canyon Volunteer Fire	8081 Bridger Canyon Rd. Bozeman	Rae/Sourdough Fire	10200 Cottonwood Rd. Bozeman
Fort Ellis Fire	3725 Bozeman Trail Rd. Bozeman	Springhill Fire Service Area	9600 Walker Rd. Belgrade
Gallatin Gateway Fire	320 Webb Street Gallatin Gateway	Three Forks Fire	13 E. Date St. Three Forks
Manhattan Fire	222 E. Main Manhattan	West Yellowstone Fire	400 Yellowstone Ave. West Yellowstone
Rae Fire Service Area	5400 Gooch Hill Rd Bozeman	Gallatin Field Fire Station	780 Gallatin Field Rd. Belgrade
Willow Creek Volunteer Fire	107 Main Willow Creek	Clarkston Fire Service Station	12455 Clarkston Rd. Three Forks
Gallatin Canyon Fire Station	910 Big Sky Spur Rd. Big Sky	Bridger Canyon Fire Department	8081 Bridger Canyon Rd. Bozeman
Gallatin Canyon Fire Station #1	2735 Aspen Dr. Big Sky	Northside Rural Fire	22500 Hebgen Lake Rd. West Yellowstone
Reese Creek Fire Station	13695 Springhill Rd. Belgrade	Airport Crash Fire Rescue	625 Yellowstone Airport Rd., West Yellowstone
Gallatin River Ranch Fire	Equestrian Center Loop Manhattan		
Critical Facilities – Hospitals and Clinics			
Bozeman Deaconess Hospital	915 Highland Bozeman	Three Rivers Clinic	16 S. Railway Three Forks
Gallatin Community Clinic	214 E. Mendenhall Bozeman	Allergy & Asthma Consultants PC	2055 N. 22 nd Ave Bozeman
Gallatin County Health Department	12 N. 3 rd Bozeman	Family Holistic	2581 Butch Cassidy Bozeman
Medical Clinic of Big Sky	68 Beaverhead Drive Big Sky	Belgrade Clinic PLLP	33 W. Main Belgrade
Kurtz, Curt MD	8707 Jackrabbit Belgrade	Belgrade Urgent Care	403 W. Main Belgrade
Manhattan Medical Services	207 S. 6 th St Manhattan	Rocky Mountain Natural Health	702 N. 19 th Ave. Bozeman
Nature’s Wisdom	9202 River Road Bozeman	Bozeman Medical Arts Center	300 N. Willson Bozeman
Bridger Mountain Physical Therapy	851 Bridger Drive Bozeman	Gallatin Mental Health Center	301 N. Willson Ave. Bozeman
Kreitzburg, Susan	4979 Durston Rd. Bozeman	Gallatin Valley Natural Medicine	317 E. Mendenhall Bozeman
Bridger Eye Center and Optical	1500 N. 19 th Bozeman	Bozeman Deaconess Outpatient Services	120 N. 19 th #D Bozeman

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Family Doctors Urgent Care	120 N. 19 th Bozeman	Rogers Dermatology Clinic	1727 W. College Street Bozeman
Family Dermatology Center	2409 W. Main St, Bldg 1 Bozeman	Hapcic, Karl MD	2619 W. College Street Bozeman
Bozeman Urgent Care	1006 W. Main Bozeman	Cottonwood Clinic	612 E. Main Bozeman
Alcohol and Drug Services of Gallatin County	502 S. 19 th Bozeman		
Swingle Health Center	MSU Bozeman	Highland Park	905-931 Highland Boulevard Bozeman
Bozeman MRI	2150 Analysis Dr. Bozeman	Bridger Orthopedic	1450 Ellis Bozeman
Yellowstone Family Medical	11 S. Electric West Yellowstone	Alpine Physicians Health Center	613 W. Lamme Bozeman
Bridger Creek Family Health	316 E. Babcock Bozeman		
Critical Facilities – Utility and Infrastructure Services			
Northwestern Energy	129 Quinn Creek Rd Bozeman	Three Forks City Shop	308 1 Ave East Three Forks
Qwest	S. Willson Ave. Bozeman	West Yellowstone Public Works	314 Yellowstone Ave. West Yellowstone
Gallatin County Landfill	Logan	Belgrade Public Works	Belgrade
Bozeman City Shops	1812 North Rouse Bozeman	West Yellowstone Public Works	314 Yellowstone Ave. West Yellowstone
Gallatin County Road Dept.	201 W. Tamarack Bozeman	Manhattan Public Works	107 S. 7 th Manhattan
Bozeman Waste Water Treatment Plant	Springhill Road	Bozeman Water Treatment Plant	Bozeman
Critical Facilities – State Government			
Montana Highway Patrol	91 E. Central #A Belgrade	Public Health & Human Services	220 West Lamme #2E Bozeman
Montana National Guard HQ	350 Airport Road Belgrade	Department of Transportation	907 N. Rouse Bozeman
Fish, Wildlife & Parks	1400 S. 19 th Bozeman		
Critical Facilities – Federal Government			
US Forest Service	3710 Fallon #C Bozeman	US Post Office	9 Frontage Road Three Forks
US Post Office	209 Grizzly Avenue West Yellowstone	US Post Office	96 N. Weaver Belgrade
US Post Office	32 E. Babcock Bozeman	US Post Office	201 E. Railroad Manhattan

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US Post Office	5711 E. Baxter Lane Bozeman	US Post Office	4 Rabel Lane Gallatin Gateway
Vulnerable Populations – Assisted Living/Senior Housing			
Evergreen Healthcare	321 N. 5 th Bozeman	Highgate Senior Living	2219 W. Oak Bozeman
Bear Creek Respite Care	1002 E. Kagy Bozeman	SpringMeadows	3175 Graf Bozeman
Birchwood At Hillcrest	1201 Highland Blvd. Bozeman	Generations Assisted Living	700 Minnesota Belgrade
Bozeman Adult Day Center	807 N. Tracy Bozeman	Open Arms Elder Care	505 Minnesota Belgrade
Our Home Elderly Care	190 Milestone Dr. Belgrade	Dutch Hearth	991 Pache Rd. Belgrade
Century Village	100 Hamilton Court Manhattan	Church Hill Retirement Home	6151 Shady Rest Church Hill
Pathways Personal Care Home	622 Main Three Forks	Mercy Manor	5830 Sypes Canyon Rd Bozeman
Edgewood Vista Adult Day Care	1011 Cardinal Drive Belgrade	Gallatin Rest Home	1221 W. Durston Bozeman
		Mountain View Care Center	205 N. Tracy Bozeman
Aspen Pointe at Hillcrest	1201 Highland Blvd. Bozeman	Darlinton Manor	606 N. 5 th Avenue Bozeman
High Country Care	8659 Haggerty Lane Bozeman	Legion Villa	1215 W. Durston Bozeman
Hamilton House	9430 Haggerty Lane Bozeman		

K. Disaster and Economic Recovery and Resiliency Strategy

The following disaster assessment and strategy is adopted as part of the 2013 NRMEDD CEDS. It is not intended to supplant or substitute for any adopted or approved emergency management, hazard mitigation, evacuation, or response plan or policy already or subsequently adopted by either Gallatin or Park Counties. It is intended to identify them as well as to define the relationship between those planning documents and the NRMEDD and economic development in our region as well as include them by reference in this CEDS.

Montana Code Annotated (MCA) 10-3-103 defines the following:

(3) "Disaster" means the occurrence or imminent threat of widespread or severe damage, injury, or loss of life or property resulting from any natural or artificial cause, including tornadoes, windstorms, snowstorms, wind-driven water, high water, floods, wave action, earthquakes, landslides, mudslides, volcanic action, fires, explosions, air or water contamination requiring emergency action to avert danger or damage, blight, droughts, infestations, riots, sabotage, hostile military or paramilitary action, disruption of state services, accidents involving radiation byproducts or other hazardous materials, outbreak of disease, bioterrorism, or incidents involving weapons of mass destruction.

(7) "Emergency" means the imminent threat of a disaster causing immediate peril to life or property that timely action can avert or minimize.

In the event of a disaster, the NRM EDD, in conjunction with its regional partners, is prepared to facilitate planning and recovery efforts as outlined in the following strategy document. Both Gallatin and Park Counties have adopted extensive and comprehensive Hazard Mitigation Plans; this brief strategy is in no way intended to undermine or replace those existing plans nor any other federal or state disaster plans. This document simply establishes the District's role in both pre- and post-disaster planning and recovery.

Phase I: Pre-disaster Preparedness Assessment

Engaging in Pre-Disaster Recovery and Mitigation Efforts

The NRMEDD attempts to participate, either directly with staff, technical committee members, and/or District Board members, in recovery and mitigation planning efforts.

Each county maintains a variety of response plans developed under national guidelines. For Gallatin County, those plans can be viewed at:

www.readygallatin.com

This website identifies a variety of hazards active in Gallatin County as well as the organizations responsible for leading response efforts. Additionally, a variety of plans are available on the site, including:

- Gallatin County Emergency Management Plan – 2011
- Gallatin County Mitigation Plan – 2012
- Gallatin County Hazardous Materials Plan – 2009
- Gallatin County Multiple Patient Incident Plan – 2009
- Gallatin County Rural Fire Operating Plan - 2012
- Gallatin County Medical Volunteer Framework – 2008
- Gallatin County Community Wildfire Protection Plan - 2006
- Gallatin County Emergency Alert System Plan
- Gallatin County Mutual Aid Agreement – 2011
- Gallatin County Fire Control Ordinance
- Middle Creek Emergency Action Plan and Inundation Map
- Willow Creek Emergency Action Plan
- Hebgen Emergency Action Plan
- Madison Emergency Action Plan
- Montana Disaster and Emergency Plan
- Montana Hazardous Materials Response Plan
- Montana Emergency Alert System Plan
- Intrastate Mutual Aid System
- Mutual Aid Frequency Plan

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According to the Ready Gallatin website, the mission of Gallatin County Emergency Management is “to minimize loss of life and personal injury, damage to property and the environment from disasters, both natural and man made. We will work dilligently to enhance our all-hazard emergency management program. We strive to accomplish this through a continuing program of outreach, coordination, planning, training, and exercising, for all hazards and for all four phases of emergency management – mitigation, preparedness, response, and recovery” (<http://www.readygallatin.com/mission.php>).

The Guiding Principles of Gallatin County Emergency Management are:

- Maintain a prepared and resistant community
- Support a coordinated interagency response
- Maintain a resilient local government.

Park County also has its own set of plans. Those documents can be viewed at <http://www.parkcounty.org/site/1DES.html>.

The plans that can be accessed from this website include:

- Park County Emergency Operations Plan
- Park County Hazard Mitigation Plan
- Hantavirus Information
- Park County Emergency Preparedness Network AKA Reverse 911

The District’s Risks and Vulnerabilities

As part of the hazard and emergency management planning processes for both counties, all hazards (both natural and man made) but be identified in each county hazard mitigation plan (HMP). For each potential hazard identified, a profile has been developed in the (HMP). The profiles must all assess information including a definition and description of the hazard; historical occurrence; probability of occurrence; vulnerability to the hazard; maximum threat (i.e., worst case scenario); severity of impact; and the speed of hazard onset. Each hazard has then been ranked and scored by the HMP’s.

Following the scoring and ranking process for the hazards themselves, each plan then assesses the vulnerability of critical facilities; social assets; and estimations of potential loss. Local goals and mitigation actions are then defined. As part of the mitigation action planning process, existing resources and assets are identified (i.e., plans, ordinances, policies, departments, etc.). These mitigation lists have not been reproduced here but are incorporated by reference.

In addition to developing county-wide mitigation measures, each plan has substantial appendices that include maps (floodplains, flood scenarios, critical sites, topography, etc.) as well as demographic overviews, individual community hazard assessments and priorities, risk and vulnerability assessments, and action step details. Some of that information is reproduced throughout this CES but the entirety of it is incorporated here by reference.

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As identified in the various plans listed above, the NRM EDD region is vulnerable to a wide variety of disasters including, but not limited to, fires, flooding, drought and extreme heat, freeze events and extreme cold, earthquakes, hazardous materials, landslides, dam failure, volcanic fallout, violence, and terrorism. Those hazards have been evaluated by emergency service personell in hazard mitigation planning documents for both counties are detailed in Tables 25 and 26 below. Both the Gallatin County Hazard Mitigation Plan and the Park County Hazard Plan extensively document a wide variety of hazards; this CEDS document incorporates those plans, their evaluations, and their mitigation measures by reference.

The January 2012 Gallatin County Hazard Mitigation Plan identifies the following summary of hazards for Gallatin County:

Table 25: Gallatin County Hazard Mitigation Plan Summary of Hazards

Hazard	Probability of Major Disaster	Property Impact	Population Impact	Economic Impact	Future Development Impact	Relative Overall Risk
Wildfire	High	High	High	Moderate	Moderate	High
Earthquake	High	High	High	High	Moderate	High
Hazardous Materials Release	High	Moderate	High	High	Moderate	High
Flooding	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate
Communicable Disease and Bioterrorism	Moderate	Low	High	High	Low	Moderate
Drought	Moderate	Moderate	Low	High	Moderate	Moderate
Winter Storms and Extended Cold	Moderate	Low	Moderate	Moderate	Low	Moderate
Utility Outage	Moderate	Low	High	Moderate	Low	Moderate
Severe Thunderstorms Wind and Tornadoes	Moderate	Moderate	Moderate	Moderate	Low	Moderate
Ground Transportation Incident	Moderate	Low	Moderate	Moderate	Low	Moderate
Dam Failure	High	Moderate	Moderate	Moderate	Moderate	Moderate
Terrorism	Moderate	Moderate	Moderate	Moderate	Low	Moderate

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Railroad Accident	Moderate	Low	Moderate	Moderate	Low	Moderate
Volcano	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate
Urban Conflagration	Moderate	High	Moderate	High	Moderate	Moderate
Avalanche and Landslide	Moderate	Low	Moderate	Low	Low	Low
Aviation Accident	Moderate	Low	Low	Moderate	Low	Low
Terrorism, Civil Unrest, and Violence	Low	Moderate	low	Moderate	Low	Low

Additionally, the Gallatin County Hazard Mitigation Plan identifies six major goals intended to reduce or prevent losses from disasters:

Goal 1: *Prevent losses from wildfires*

- A. Reduce private losses from wildfires
- B. Increase understanding of the wildfire hazard areas
- C. Assist property owners in completing mitigation measures

Goal 2: *Reduce potential losses from earthquakes*

- A. Prevent earthquake losses to critical facilities, vulnerable populations, and Infrastructure
- B. Minimize private earthquake losses

Goal 3: *Reduce damages from flooding*

- A. Reduce losses to private property from flooding
- B. Maximize the protection of life and property through government resources and services.
- C. Provide the public with information and means to prevent private flood losses
- D. Improve understanding of the flood hazard and mitigation measures

Goal 4: *Reduce losses from a transportation or hazardous materials accident*

- A. Allow for emergency traffic and evacuation routes during a hazardous materials or ground transportation incident

Goal 5: *Prevent significant loss of life and illness from communicable disease and Bioterrorism*

- A. Improve ability to quickly identify communicable disease outbreaks or a bioterrorism incident
- B. Increase ability to provide communicable disease information during an outbreak or bioterrorism incident
- C. Reduce mortality and morbidity related to communicable disease

Goal 6: *Promote all-hazard mitigation measures*

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- A. Ensure critical infrastructure is operational during disasters
- B. Improve warning capabilities
- C. Increase emergency management and disaster service capabilities to prevent additional losses in a disaster
- D. Improve digital data for assessing all hazards

Table 26: Park County Hazard Mitigation Plan Summary of Hazards

Park County Hazard Prioritizations	
Level	Hazard
High Hazard	Flooding Wildfire Earthquake Hazardous Materials Release Wind Winter Storms and Extended Cold
Moderate Hazard	Severe Thunderstorms and Tornadoes Communicable Disease and Bioterrorism Drought Ground Transportation Accident Urban Fire Dam Failure
Low Hazard	Utility Outage Volcano Terrorism, Civil Unrest, and Violence Aviation Accident Railroad Accident Avalanche and Landslide
City of Livingston Hazard Prioritizations	
High Hazard	Flooding Earthquake Hazardous Materials Release Wind Winter Storms and Extended Cold
Moderate Hazard	Communicable Disease and Bioterrorism Severe Thunderstorms and Tornadoes Urban Fire Drought

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Low Hazard	Utility Outage Ground Transportation Accident Wildfire Aviation Accident Terrorism, Civil Unrest, and Violence Railroad Accident Volcano
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Town of Clyde Park Hazard Prioritizations

High Hazard	Flooding Severe Thunderstorms and Tornadoes Wildfire Winter Storms and Extended Cold Hazardous Materials Release
Moderate Hazard	Communicable Disease and Bioterrorism Wind Drought Urban Fire Dam Failure Earthquake
Low Hazard	Ground Transportation Accident Wildfire Aviation Accident Terrorism, Civil Unrest, and Violence Railroad Accident Volcano

Town of Clyde Park Hazard Prioritizations

High Hazard	Flooding Severe Thunderstorms and Tornadoes Wildfire Winter Storms and Extended Cold Hazardous Materials Release
Moderate Hazard	Communicable Disease and Bioterrorism Wind Drought Urban Fire Dam Failure Earthquake
Low Hazard	Ground Transportation Accident Utility Outage Aviation Accident Volcano Terrorism, Civil Unrest, and Violence

Additionally, the Park County Hazard Mitigation Plan identifies six major goals intended to reduce or prevent losses from disasters:

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Goal 1: Reduce damages from flooding.

- A. Prevent flood damages to critical facilities, critical infrastructure, and future development through government resources, services, and authorities
- B. Objective 1.2: Provide the public with information and means to prevent private flood losses

Goal 2: Prevent losses from wildfires.

- A. Objective 2.1: Increase understanding of the wildfire hazard areas
- B. Objective 2.2: Reduce private losses in the wild land urban interface

Goal 3: Reduce potential losses from earthquakes.

- A. Objective 3.1: Prevent earthquake losses to critical facilities, vulnerable populations, and infrastructure
- B. Objective 3.2: Minimize private earthquake losses

Goal 4: Reduce losses from a transportation or hazardous materials accident.

- A. Objective 4.1: Allow for emergency traffic and evacuation routes during a hazardous materials or ground transportation incident

Goal 5: Promote effective multi-hazard mitigation measures.

- A. Objective 5.1: Improve warning capabilities
- B. Objective 5.2: Increase emergency management and disaster service capabilities to prevent additional losses in a disaster
- C. Objective 5.3: Improve digital data for assessing all hazards
- D. Objective 5.4: Mitigate the impact of hazards on future development through land use and building regulations
- E. Objective 5.5: Educate businesses and the public on simple mitigation activities
- F. Objective 5.6: Protect critical infrastructure from a variety of hazards

Inventory and Organize the Community Recovery Resources

Both Park and Gallatin Counties, through their emergency planning processes, have identified long-term resources for their residents and businesses. Those “critical facilities” have been detailed in Table 24 above (pages 70-73). Because those HMP’s were drafted prior to revitalization of the NRMEDD and hiring on the District’s Executive Director, the District has not been listed as a resource. The NRMEDD will work with the emergency management coordinators of both Park and Gallatin Counties to ensure that they are aware of the resources the District has and lists the District as a resource in its next iteration of hazard planning.

Engage in Business Continuity Planning

The NRMEDD sees business continuity planning as one of the most critical of its potential roles in the case of a local disaster. The NRMEDD has begun using the “Business Continuity Template” available on the www.ready.gov FEMA website to begin planning for business continuity efforts. Generally, the business continuity process consists of four primary steps:

- Conduct a business impact analysis to identify time-sensitive or critical business functions and processes and the resources that support them;
- Identify, document, and implement to recover critical business functions and processes;
- Organize a business continuity team and compile the basics of a business continuity plan to manage a business disruption;
- Conduct training for the business continuity team and testing and exercises to evaluate recovery strategies and the plan.

Ensure Resources are Available for the Elderly and those with Special Needs

Persons who are elderly or who have special needs have been addressed in each of the county HMP's. This CEDS document incorporates those documents and their actions by reference. Additionally, this CEDS notes a number of critical facilities, including rest homes and other services for seniors, in Table 24 (pages 70-73 above).

Identify Shelters

Identification of shelters for mitigating disasters is a part of the HMP process. This CEDS document incorporates those documents and their actions by reference. Additionally, this CEDS notes a number of critical facilities, including shelters, in Table 24 (pages 70-73 above).

Identify Recovery Partners, Type of Assistance, and Resources. Develop an interagency action plan.

Both counties have adopted HMP's which extensively document partners, type of assistance, and resources as well as interagency action plans and mitigation steps. Those partners include but are not limited to:

- Local governments and elected officials and their administrations
- Disaster and emergency services
- 911 dispatch
- Law enforcement
- Fire departments and districts
- Emergency medical services and providers, including ambulance
- Coroner
- Public health officials and departments
- Hospital and medical providers
- Voluntary organizations
- Water and sewer departments and districts
- Street and road departments
- Utility providers
- Schools
- Veterinary providers
- State and federal emergency management agencies
- State and federal law enforcement entities
- State and federal fire fighting entities
- State and federal public health entities

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- State and federal transportation entities
- Montana National Guard

This CEDS document incorporates those documents and their actions by reference.

Identify What Recovery Actions Will Take Place Immediately, Short Term, Intermediate, and Long Term

Both county HMP’s identify a variety of actions that will take place in the case of disaster. Both HMP’s prioritize those actions and identify the responsible partner and potential funding options. Table XX lays out the implementation plan for actions in Gallatin County. The priority score for each action is based on an evaluation of the cost, the feasibility, the population benefit, the property benefit, and the hazard rating. Higher numeric rankings mean higher priorities. This CEDS document incorporates those documents and their actions by reference.

Table 27: Gallatin County Disaster Recovery Actions and Priorities

Project Description	Jurisdiction	Responsible Department/Partner	Potential Funding	Priority Score
Earthquake Retrofit Education	Gallatin County and Incorporated cities	Emergency Management	FEMA	15
Severe weather preparedness	Gallatin County and Incorporated cities	Emergency Management, Weather Service	NWS, FEMA	15
Emergency Alert System Plan	Gallatin County and Incorporated cities	Emergency Management, 911, NWS, Broadcasters	FEMA	15
NOAA Weather Radio Distribution	Gallatin County and Incorporated cities	Emergency Management, NWS	FEMA, NWS	15
Fixed site mapping	Gallatin County and Incorporated cities	Emergency Management, DEQ	DOT, FEMA	14
Community Wildfire Protection Plan	Gallatin County and Incorporated cities	County Fire, DNRC	DNRC	14
Wildfire History Database	Gallatin County and Incorporated cities	Facilities	DNRC	14
Anchor Transformers and Generators	Gallatin County and Incorporated cities	Facilities	FEMA	13
Earthquake Retrofit Incentives	Gallatin County and Incorporated cities	Elected Officials	FEMA	13
Fire Fuels Mapping	Gallatin County and Incorporated cities	County Fire, DNRC, GIS	DNRC	13
Fire Wise Programs	Gallatin County and Incorporated cities	Fire Service, Emergency Management	DNRC, Fire Safe Montana	13
Emergency Transportation Plan	Gallatin County and Incorporated cities	Emergency Management	DOT	13
HAZUS GIS Data Development	Gallatin County and Incorporated cities	GIS	FEMA	13
Community Preparedness Program	Gallatin County and Incorporated cities	Emergency Management	FEMA	13
Critical Infrastructure Backup	Gallatin County and Incorporated cities	Facilities	FEMA	12
Flood Insurance Education	Gallatin County and Incorporated cities	Emergency Management, Planning	FEMA, NWS	12

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NFIP Mapping and Participation	Gallatin County and Incorporated cities	Planning	FEMA	12
Surveillance System	Gallatin County and Incorporated cities	Health Department	DPPHS	12
Medical Stakeholders Group	Gallatin County and Incorporated cities	Health Department	DPPHS	12
Health Care Communication	Gallatin County and Incorporated cities	Health Department	DPPHS	12
Chempack Plan	Gallatin County and Incorporated cities	Health Department	DPPHS, CDC	12
Defensible Space Requirements	Gallatin County and Incorporated cities	Planning, Fire Service	DNRC	11
Subdivision Regulations for wildfire	Gallatin County and Incorporated cities	Planning, Fire Service	DNRC	11
Individual WUI Assessments	Gallatin County and Incorporated cities	Fire Service	DNRC	11
Homeowner Fuels Reduction	Gallatin County and Incorporated cities	Fire Service	DNRC	11
Critical Facility Tie Downs	Gallatin County and Incorporated cities	Facilities	FEMA	11
Critical Facility Retrofit	Gallatin County and Incorporated cities	Facilities	FEMA	11
Seismic Bridge Inspections	Gallatin County and Incorporated cities	Road and Bridge	DOT	11
Expansion Joint for Utilities	Gallatin County and Incorporated cities	Public Works, Facilities	FEMA	11
Prioritize and Harden Infrastructure	Gallatin County and Incorporated cities	Facilities	FEMA	11
Enhanced Weather Forecast	Gallatin County and Incorporated cities	Emergency Management, NWS	NWS	11

Park County has also prioritized its mitigation actions using the same criteria. The top priorities by hazard and jurisdiction are included in the table below. The goal timeframes are defined as:

- Near term: initiated within 0-30 years
- Mid term: initiated within 3-6 years
- Long term: initiated within 7-10 years
- Ongoing: already initiated and continuing
- Post disaster: may best be initiated during the recovery process

Table 28: Park County Disaster Recovery Actions and Priorities

Proposed Action	Jurisdiction(s)	Priority	Goal Timeframe
<i>Supportive</i>			
Firesafe Coalition	Park County/Clyde Park	High	Ongoing
<i>Educational/Informational</i>			
Mitigation Education	All	High	Near Term, post disaster
Flood insurance education	All	Medium	Mid term, post disaster
Fuels and fire mapping	Park County	Medium	Ongoing
Earthquake retrofit education	Park County, Livingston	Medium	Mid term
Earthquake retrofit education	Clyde Park	Low	Long term

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HAZUZ-MH GIS data	Park County	Low	Long term
<i>Policy/Regulatory</i>			
Floodplain ordinance	All	High	Near term
Capital improvements plans	All	High	Near term
Building codes	Park County, Clyde Park	High	Near term
Growth policies and subdivision regulations	Park County, Clyde Park	High	Near term
Growth policies and subdivision regulations	Livingston	Medium	Mid term
Conservation easements	All	Low	Ongoing, post disaster
<i>Property Protection</i>			
Fuel reductions	Park County	High	Ongoing
Critical facilities seismic retrofits	Park County/Livingston	High	Near term
Livingston berm alternatives	Park County/Livingston	High	Near term
River bank stabilization and flood mitigation	Park County	Medium	Mid term, post disaster
Flood prone property acquisition program	Park County	Medium	Mid term, post disaster
Critical facility seismic retrofits	Clyde Park	Medium	Mid term
Earthquake retrofit program	All	Medium	Mid term, post disaster
Regional water sources	Park County	Low	Long term
<i>Infrastructure Protection</i>			
Infrastructure seismic improvements	Park County, Livingston	High	Near ter, post disaster
River crossing improvements	Park County, Livingston	High	Ongoing, post disaster
Bridge, culvert, and road improvements	All	High	Near term, post disaster
Snow fences	Park County, Livingston	High	Near term, post disaster
Electric and communications infrastructure	All	High	Near term, post disaster
Infrastructure seismic improvements	Clyde Park	Medium	Mid term, post disaster
Snow fences	Clyde Park	Medium	Mid term, post disaster
Water body and ditch maintenance	All	Medium	Ongoing
<i>Community Resilience</i>			
Storm ready community	All	High	Near term
Generators	All	High	Near term, post disaster
Railroad crossing	Livingston	High	Near term
Ingress/egress road improvements	Park County	Medium	Mid term

The Park County HMP also notes a variety of funding sources, including but not limited to:

- Corporation for national and community service
- US Dept of Homeland Security
- US EPA
- US Housing and Urban Development
- Montana Department of Natural Resources and Conservation
- US EDA
- US Natural Resources Conservation Service
- FEMA – Region VIII

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- Montana Disaster and Emergency Services
- US Department of Justice
- US Bureau of Land Management
- Montana Public Safety Service Bureau
- US Fish and Wildlife Service
- PPL Montana
- National Interagency Fire Center
- US Small Business Administration
- US Army Corps of Engineers

Evacuation Plan Development and Dissemination

Both Gallatin and Park Counties have adopted HMP's as well as a variety of other plans addressing evacuation in the case of hazardous material spills, wildfire, flood inundation, etc. All pertinent emergency responders were involved in the planning processes addressing evacuation needs and all relevant agencies and their responsibilities are listed in the adopted HMP's. This CEDS document incorporates those documents and their actions by reference.

Establish a Communication Chain

Both of the counties' HMP's were developed using a comprehensive interagency planning process. That planning process clearly laid out responsibilities, communication chains, and action steps in the case of emergency. This CEDS document incorporates those documents and their actions by reference.

Engage the Community

Both of the counties' HMP's were developed using extensive public input and community engagement. Stakeholders were engaged in public meetings as well as through individual interviews and surveys. All relevant public agencies were engaged in the planning process and continue to be involved in implementation and evaluation. Copies of both HMP's are available at a number of public offices, and both plans note that public and community processes will be used if the HMP is amended or updated.

Phase II: Post-disaster Planning and Implementation

Disaster Assessment

In the days and weeks following a disaster, the NRM EDD will develop a disaster-specific strategy as is appropriate. The following process will be used as the NRM EDD commits its resources to be available to assist counties and communities:

- Assess the nature and magnitude of the disaster
- Assess the impact on both local and regional economies (business, industry sectors, labor market, etc.)
- Assess the impact on transportation and public infrastructure
- Assess the impact on housing, schools, and health care facilities

Develop and/or Implement Recovery Timeline

Based on the results of the disaster assessment, the NRM EDD will help regional partners and community leaders move forward with:

- Listing and prioritizing recovery activities to be performed
- Identifying resources (federal, state, local, and private sector) needed for each activity
- Determining the level and type of assistance needed
- Identifying roles and responsibilities
- Determining the timeframe for each recovery activity (immediate, short-term, intermediate, or long-term)
- Establishing recovery benchmarks

Implementing the Recovery Plan (long-term recovery)

In order to accomplish recovery activities quantified as part of long-term recovery, the NRM EDD is capable of:

- Identifying business, economic, and entrepreneurial rebuild initiatives and activities
- Identifying and utilizing workforce initiatives to employ workers and rebuild the local economy
- Applying for funds from federal, state, and local programs
- Developing management plans to ensure the most effective use of funds

Conclusion

In the event of a disaster, the NRM EDD is committed to:

- Convening relevant partners to focus on business recovery planning
- Providing local officials, business leaders, and other community partners with access to regional demographic, economic, and hazard vulnerability data
- Developing technical expertise and economic analysis tools for conducting initial disaster assessments and long-term economic impact analysis
- Establishing collaborative relationships with local government officials and non-government organizations that may provide data, funding, technical expertise, and other resources essential to intermediate and long-term economic recovery following a disaster event
- Offering grant writing expertise and technical assistance to regional and local entities, both for pre-disaster resiliency initiatives as well as post-disaster recovery efforts
- Establishing familiarity with traditional economic and community recovery funding sources, including resources for business development assistance programs, such as EDA's Revolving Loan Fund (RLF) programs as well as private, nonprofit, and philanthropic resources
- Providing technical support to impacted businesses
- Encouraging concepts and principles of economic resiliency strategies into the existing planning and development plans and activities within the region
- Leveraging assets

- Offering a neutral forum to convene diverse stakeholders and facilitate discussion and planning initiatives around the issues of economic resiliency preparedness and recovery

L. Wastewater Treatment

Gallatin County does not directly provide wastewater treatment facilities as a public service, but facilitates procedural guidelines established by the state which assist the development of County Water and Sewer Districts. Water and Sewer Districts are not operated, maintained or funded by the county, but are administered by a local board of directors funded and supported by the individual district. Once established, these districts are subject to state requirements for operation and maintenance as well as a monitoring program.

Gallatin County currently has sixteen water and sewer districts including:

- Willow Creek County Water & Sewer District #306
- Amsterdam/Churchill County Water & Sewer District #307
- Rae Subdivision County Water & Sewer District #313
- Riverside County Water & Sewer District #310
- Yellowstone Holiday County Water & Sewer District #348
- Big Sky County Water & Sewer District #363
- Valley Grove County Water & Sewer District #373
- 4 Dot Meadows County Water & Sewer District #374
- River Rock County Water & Sewer District #377
- Four Corners County Water & Sewer District #385
- Bridger Pines County Water & Sewer District #390
- Mount Ellis Phase IIA County Water & Sewer District
- Spain Bridge Meadows County Water & Sewer District
- Hebgen Lake Estates County Water & Sewer District
- Gallatin Gateway County Water & Sewer District
- Spain Bridge Subdivision County Water & Sewer District

In addition to county services, city treatment facilities are present in Bozeman, Belgrade, Manhattan, Three Forks, and West Yellowstone. Additionally, several small private wastewater treatment facilities are located in various subdivisions throughout the county.

Bozeman uses the most advanced treatment processes to remove pollutants from wastewater, and discharges into the East Gallatin River. Belgrade stores wastewater in lagoons and disposes of residue on land after it has been aerated and clarified, while Manhattan is permitted to discharge treated sewage into the Gallatin River.² Three Forks manages a lift station that pumps wastewater to lagoons

² The Gallatin Watershed Sourcebook

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which are emptied to an evaporation pond or discharged into the Madison River, and West Yellowstone operates an extended aeration system that routes wastewater through a series of treatment cells.³

Park county water and sewer districts:

Gardiner Water and Sewer District

Cooke city Water District

Mill Creek Water District

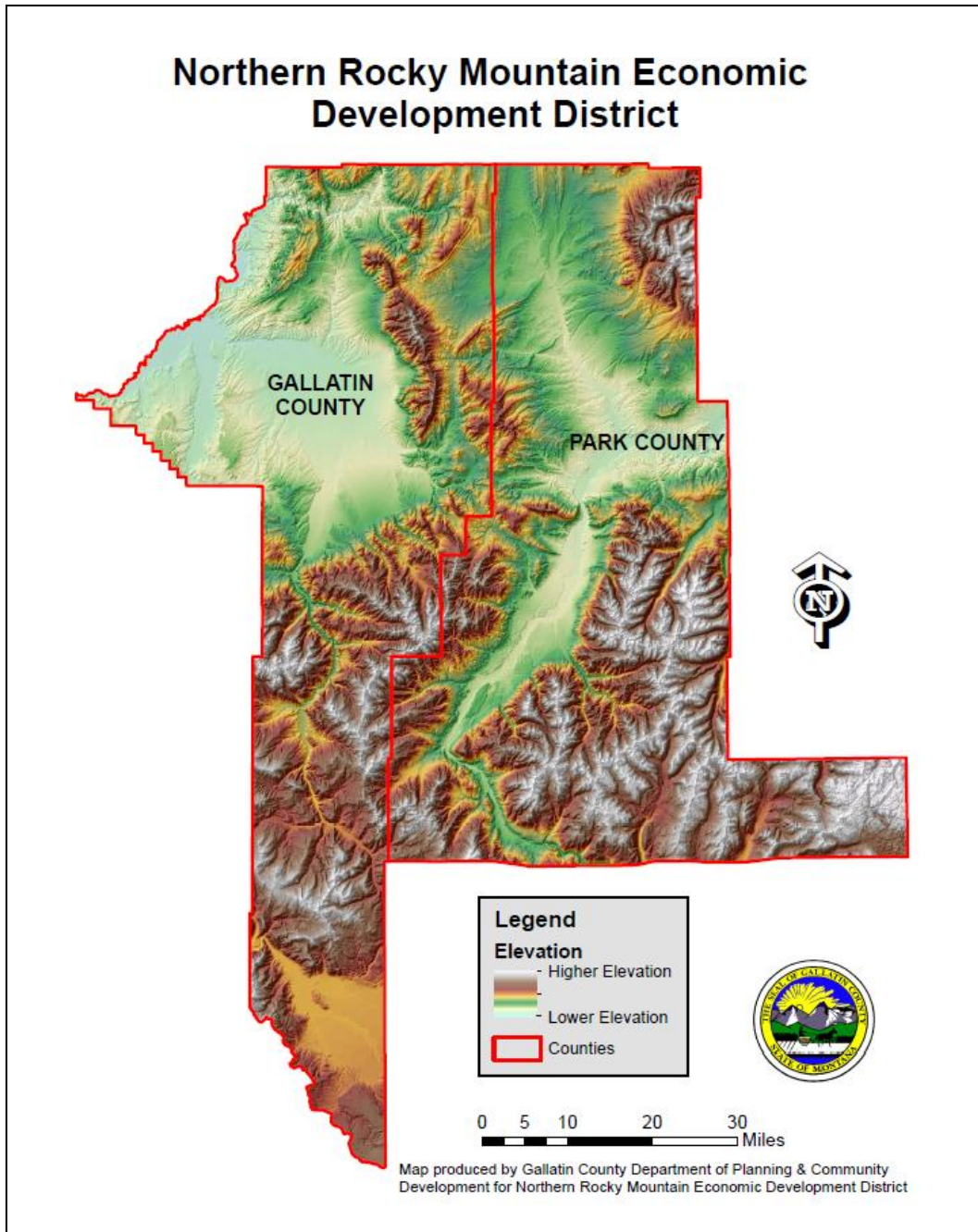
Wilsall Water District

M. Environmental Conditions

General Environment

Much of the District's environment is dominated by the mountainous landscapes of the southern portion of the region. The District lies north of Yellowstone National Park on the northwestern edge of the Greater Yellowstone Region, and much of the District's environment is dominated by the mountainous landscapes of the southern portion of the region.

³ Three Forks wastewater manager, West Yellowstone Public Works Superintendent



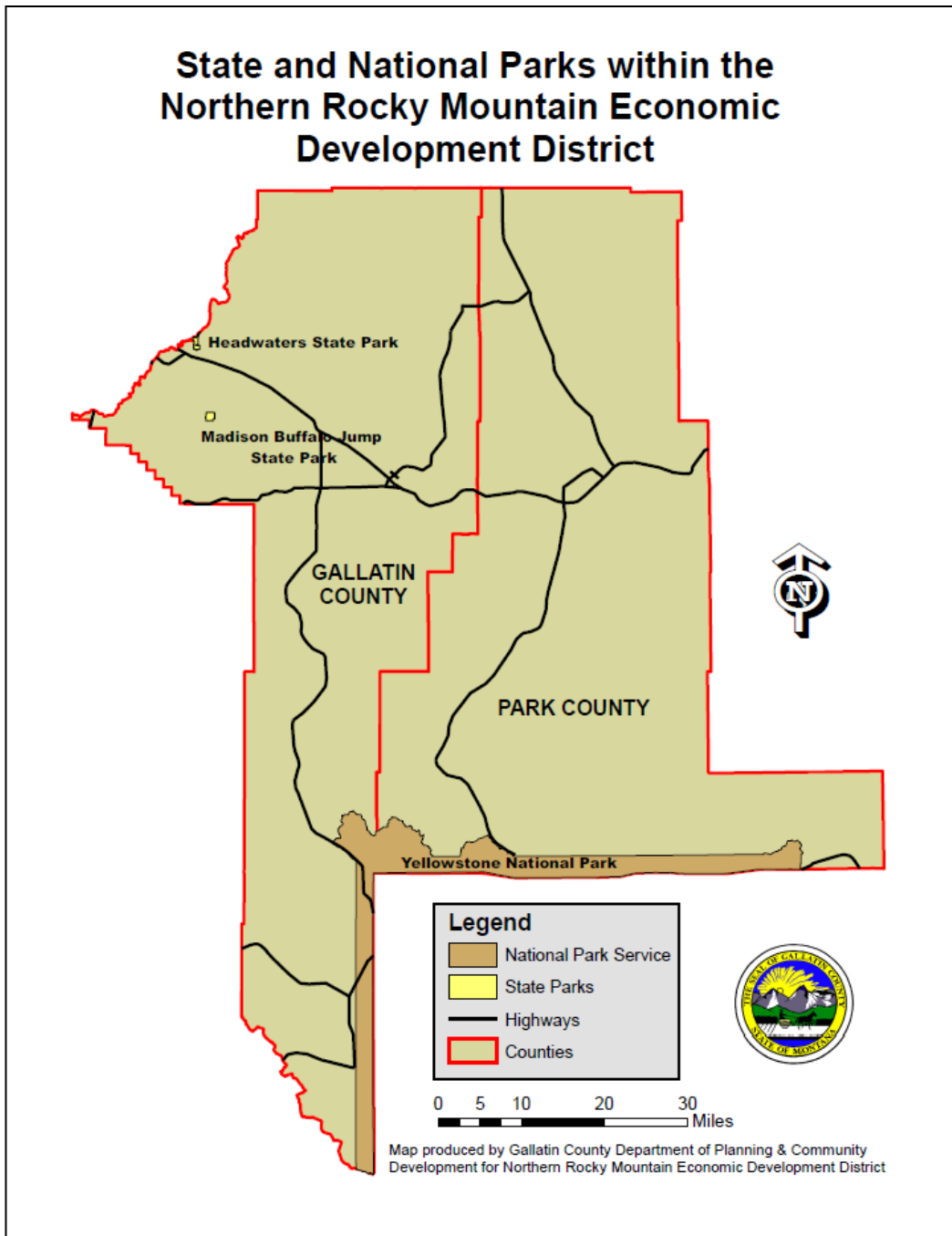
Map 4: Northern Rocky Mountain Economic Development District general environment

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State and National Parks

There are only two State Parks in the District: Headwaters State Park, where the Gallatin River, the Jefferson River, and the Madison River come together at the headwaters of the Missouri River; and the Madison Buffalo Jump State Park.

Yellowstone National Park forms the southern boundary of the District.

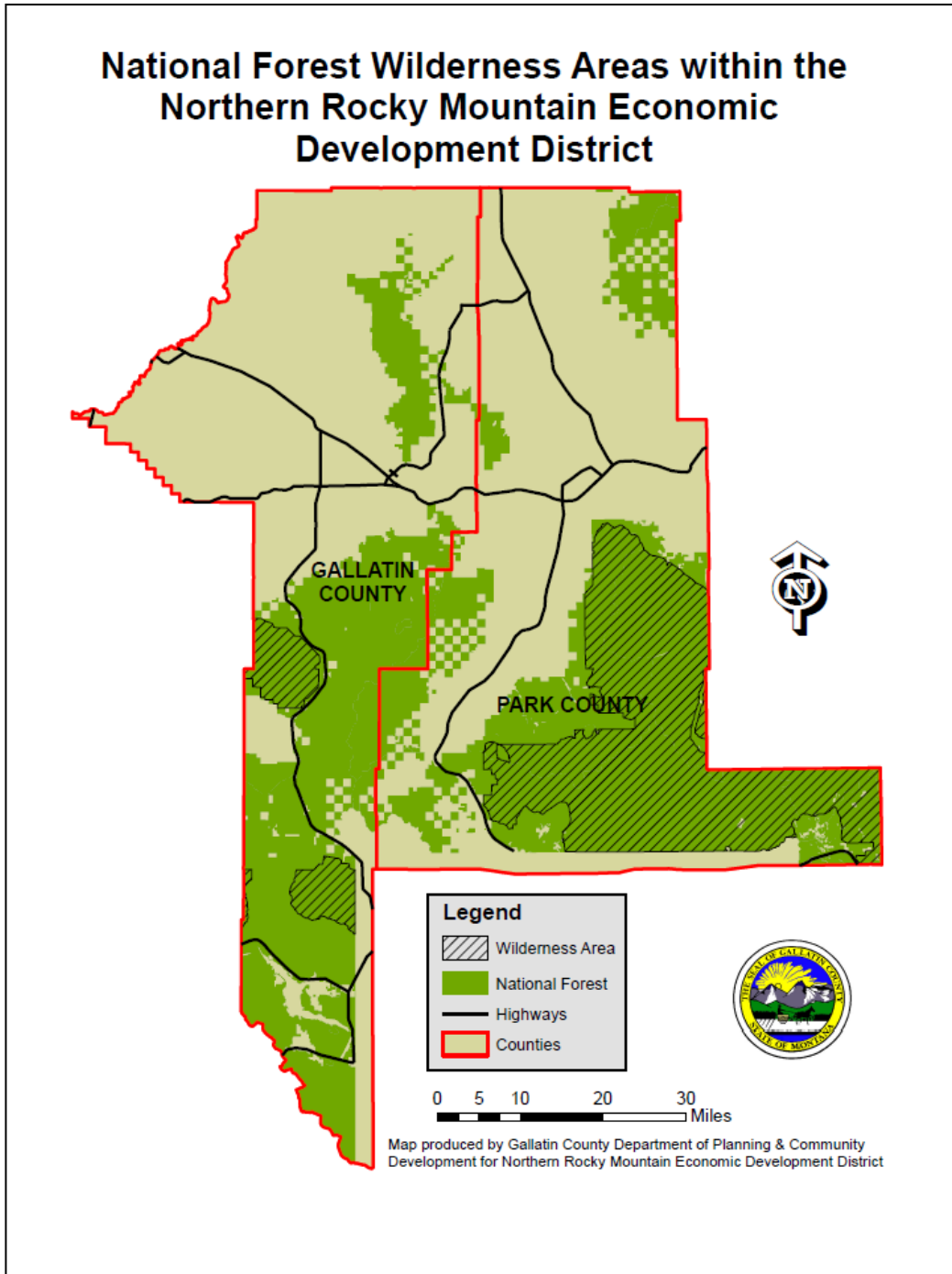


Map 5: State and National Parks, NRM EDD

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Wilderness Areas

Much of the southern portion of the District is covered by United States Forest Service Land. Significant portions of those areas are categorized as wilderness. As noted elsewhere in the document, the vast public lands within the District boundary significantly contribute to the area's tourism and outdoor recreation industry.



Map 6: Wilderness Areas, NRM EDD

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Wild and Scenic Rivers

There are no federally designated Wild and Scenic Rivers in the District.

Endangered or Threatened Species

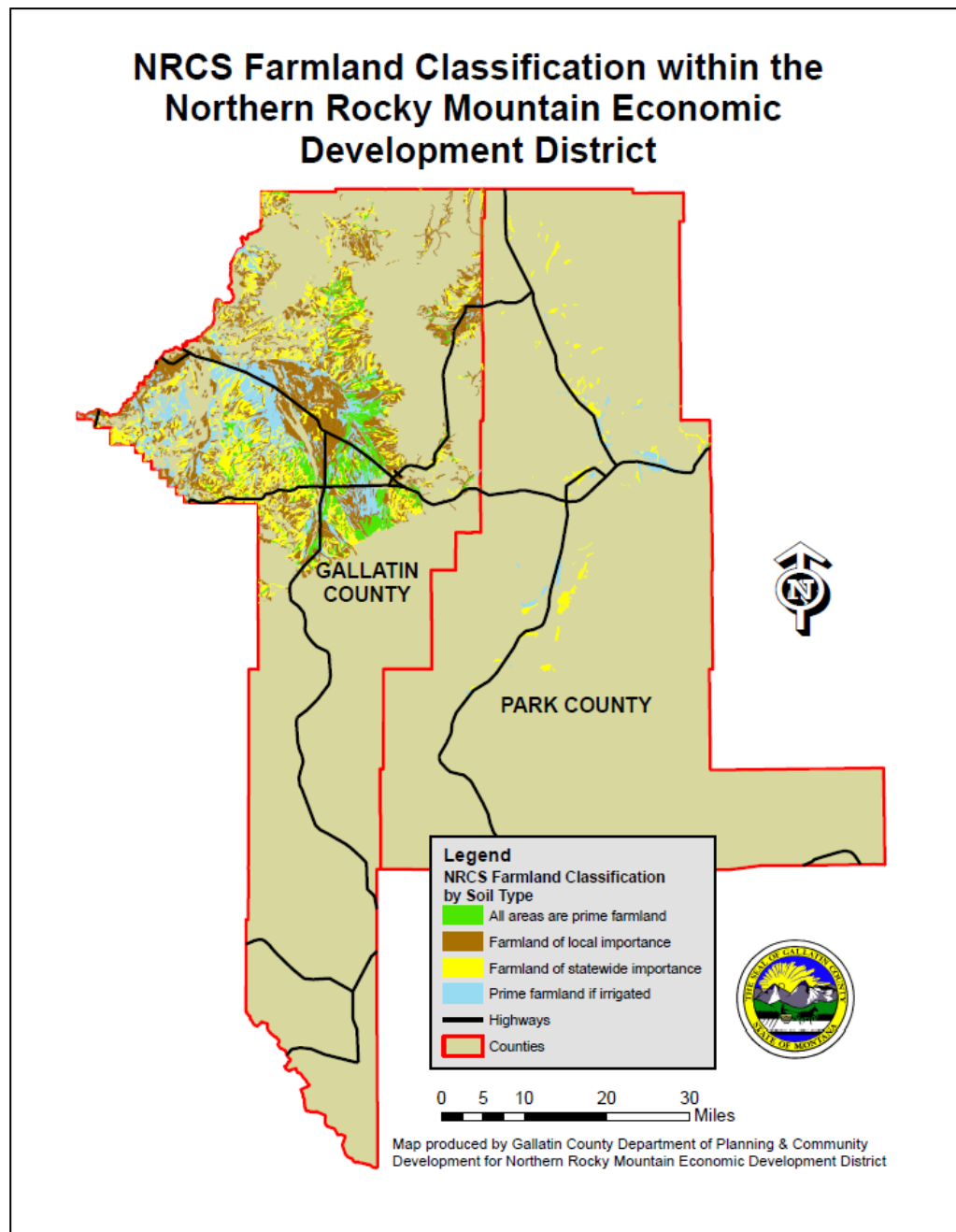
The following species are listed by Montana Fish, Wildlife, and Parks as likely occurring in the District:

Latin Name	Common Name	Status
<i>Spiranthes diluvialis</i>	Ute Ladies' Tresses	Listed Threatened
<i>Lynx canadensis</i>	Canada Lynx	Listed Threatened, Designated Critical Habitat
<i>Ursus arctos horribilis</i>	Grizzly Bear	Listed Threatened
<i>Centrocercus urophasianus</i>	Greater Sage-Grouse	Candidate
<i>Anthus spragueii</i>	Sprague's Pipit	Candidate
<i>Gulo gulo luscus</i>	Wolverine	Candidate
<i>Pinus albicaulis</i>	Whitebark Pine	Candidate

Additionally, both Lynx and Whooping Crane are *species of concern* that have been directly observed in Gallatin and Park Counties in the past decade and are noted in the Montana Natural Heritage Program database. The database notes that the MT Natural Heritage Program database provides information pertaining to the status and occurrence of species of concern. The species occurrence and observation databases represents a statewide inventory of KNOWN locations but that these data do not result from systematic monitoring or inventories. The absence of evidence is not evidence of species absence. Despite these limitations, these databases are the state's most comprehensive databases on biodiversity and are widely used

Prime/Unique Agricultural Lands

Most of the District's prime agricultural soils are in the western portion of the Gallatin Valley. This area contains farmland of local importance, farmland of statewide importance, and prime farmland if irrigated.



Map 7: Farmland Classification, NRM EDD

Federal Superfund Sites

The District has one Federal Superfund Site: The Idaho Pole Site, located near the northern limits of Bozeman, Montana. The site includes about 75 acres, of which approximately 65 acres are owned by Idaho Pole Co. A small section of I-90 (transsects the property. The area to the south of I-90 consists of 41.4 acres and is currently zoned M-2 (heavy industrial). This southern portion of the property is bound by Montana Rail Link (MRL) tracks to the south, an old MRL rail spur and the Montana Ready Mix and Crane Service Company to the east, I-90 to the north, and residential property, "L" Street and

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commercial property (Empire Building Materials) to the west. The property is bisected by Cedar Street, which runs east-west across the property. According to the City of Bozeman, the planned future land use for that portion of the property is industrial. Significant remaining features of the property include offices, groundwater extraction and injection galleries, monitoring wells, a water treatment building and areas where treated soils have been left in place.

The property to the north of I-90 comprises 32.8 acres. This area contains property owned by Idaho Pole Co. and Northwestern Energy. It is bound by Bohart Lane and I-90 to the south, Rocky Creek to the east, and residential property to the north and west. "L" Street runs along the western edge of the property, bisecting the northwestern corner of the property. The existing zoning for the area north of I-90 is a mixture of manufacturing and residential. According to the city of Bozeman, the planned future land use is industrial and residential.

The Idaho Pole Co. (IPC) wood treating facility began operation in 1945 using creosote to preserve wood. In 1952 the company switched to pentachlorophenol in carrier oil (similar to fuel oil) for the wood treating solution. Site processes included pole treatment in butt vats with later addition of pressurized heated retort equipment in the area south of Cedar St. Treated poles were stacked for drying and shipment in the area. Burlington Northern operated a railroad roundhouse where wood treating chemicals and timber were shipped in and treated poles were shipped out of the site. Pole treatment processes included pole peeling with a bark-fill area for wood waste north of Cedar St. The current I-90, including surface water culverts, was constructed some time after wood-treating activities commenced at the site. In 1975 a pressurized heated retort was added for treating full length poles. The pole-length vats were removed in the early 1980s. There was also a drying area where treated poles were stored prior to shipment. IPC continued wood treating with a pressurized heated retort and butt-dipping vat until September 1997 when the company ceased wood-treating operations.

In 1978, the Montana Department of Fish, Wildlife and Parks notified the Montana Department of Health & Environmental Services (MDHES) of a suspected release of oily wood treating fluid from the plant. MDHES found evidence of a release in ditches near the facility and near Rocky Creek. Consequently, MDHES issued a compliance order on September 29, 1978, notifying IPC of statutory violations and directing the company to stop uncontrolled releases and to clean up spilled treating fluid. The company built an interceptor trench along a portion of the property line to halt some of the pentachlorophenol (PCP) from entering the groundwater. In 1983, the EPA and the state sampled the trench and found that PCP was moving away from the plant. EPA proposed the facility for the National Priorities List (NPL) in 49 FR 40320 of October 15, 1984. The listing was final on June 10, 1986 in 51 FR 21054.

The main reason for putting this site on the NPL was that groundwater beneath the site had become contaminated with oily wood-treating fluid that had spilled, dripped or discharged onto the ground surface. The oily wood-treating fluid migrated downward, contaminating the soil that it passed through, and entered the groundwater. Some of this fluid made its way to the surface of groundwater, and some of the fluid attached to soil particles above and below the water table. And a portion of this fluid dissolved in groundwater, where it migrated down-gradient toward potential human and ecological receptors, preventing the groundwater from being used for its designated classifications, beneficial uses and specific standards. The current site risks include someone using the contaminated water for potable use and trespassers encountering active components of the groundwater remedy. However,

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institutional controls are in place to prohibit groundwater use and fences have been placed around the active groundwater remedy components to restrict access.

A Record of Decision (ROD) selecting the site remedy was issued in September 1992 and subsequent Explanations of Significant Differences (ESDs) issued in 1996 and 1998. The ROD identified PCP, PAHs, polychlorinated dibenzo-p-dioxins and polychlorinated dibenzofurans (dioxins/furans) as contaminants of concern and identified soil and groundwater contamination as a single operable unit. The ROD established performance standards for those contaminants of concern at the site for both soil and groundwater that was predicated on the fact that long-term groundwater protection could only be achieved if the soil, acting as a source of contamination, no longer contributed contaminants to the groundwater and also that the existing groundwater be treated until performance standards are met.

The objective of the response actions implemented in the 1992 ROD as well as subsequent ESDs was to alleviate the primary threats to human health and the environment posed by contaminant sources and contaminant migration. Specifically, the response actions proposed for the site by the EPA and the Montana Department of Environmental Quality (DEQ) were designed to prevent human exposure to contaminated soils by treating contaminated soils in a lined land treatment unit (LTU). The protection of the environment was to be accomplished through contaminant source removal and treatment as well as the cleanup of contaminated groundwater through an enhanced in-situ biodegradation process.

The Idaho Pole Co. began the soil excavation portion of the cleanup in 1995. The company dug up soils and constructed a land treatment unit. Contaminated soils were excavated from six areas at the site: the Pressure Plant Area, beneath Cedar Street, the Barkfill Area, the Roundhouse Area, the Cedar Street Ditch and the Pasture Area. In the summer of 1999, the company demolished and disposed of structures, and excavated additional contaminated soil from underneath the demolished structures. Approximately 24,000 cubic yards of contaminated soil were excavated and placed in the LTU for treatment. Normal LTU operations continued through October 2000 and then ceased, when the ROD performance standards for PCP and PAHs were determined to have been met. Two pits were then excavated on-site and the treated soil, along with the filter sand from the LTU, was placed in each of the pits and covered with 12 inches of clean fill to prevent direct contact. All the construction requirements for treatment of the soils at this site have been met as described in the Preliminary Site Close Out Report dated March 21, 1998 and the Remedial Action Completion Report dated December 23, 2002.

The groundwater remediation consists of an extraction/injection system with carbon treatment and an in-situ bioremediation component. The system began operation in February 1997 and approximately 455 million gallons have been processed by the groundwater recovery system through December 2011. A down-gradient product recovery trench is used to recover oily residue at the surface of the groundwater. Both systems are operating as designed and continue to remove contaminants from the groundwater. A series of wells are monitored semi-annually. Eight residential wells down gradient are tested for pentachlorophenol annually. Test results from the residential well monitoring program indicate that contaminants have not been detected in residential wells at reported detection limits since sampling began in the 1990s. One residential well is sampled semi-annually because PCP concentrations are detected. However, this property is owned by IPC and the water is not used. Overall, approximately 54 pounds of PAHs and 281 pounds of PCP have been removed from the groundwater since start up in 1997. Groundwater data collected since 1997 and modeling done in 2007 demonstrate that the overall mass of the groundwater plume has decreased significantly since implementation of the remedy. The

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groundwater component of the remedy at the Idaho Pole Co. site is protective of human health and the environment.

State Superfund Sites

Eighteen State Superfund Sites are located in the District. Several of these sites are located along the MRL Rail Line and will need to be remediated prior to any redevelopment.

Site Name	Alternate Name	City	County	Operation	Description
Bozeman Old City Landfill	Glen Lake - East Gallatin Recreation Area	Bozeman	Gallatin	Operated from 1962 to 1970	Inactive municipal landfill
Bozeman Solvent Site	Nelson Trailer Court - Buttrey Shopping Center	Bozeman	Gallatin	Operated from 10/15/1960 to 7/15/1993	Chlorinated Solvent Contaminated Groundwater, inactive drycleaner
CMC Asbestos Bozeman	East Main Depot - Bozeman	Bozeman	Gallatin	Operated from 1892 to 1988	Asbestos ore storage and processing, recycling/salvage yard.
Davis Post Yard		Willow Creek	Gallatin	Operated from 1950s to 1965 +/-	Inactive wood treating facility
Developmental Technology		Bozeman	Gallatin	Operated from Unk to 1976	Inactive electroplating facility
Diamond P Ranch		West Yellowstone	Gallatin	Fence post treatment with pentachlorophynol	The facility is currently used as a commercial horse horseback riding service. From 1955 to 1995 fence posts were treated on site with pentachlorophenol and motor oil.
Ideal Basic Industry Plant Site Area	Holnam Inc - Trident Cement	Trident	Gallatin	Operated from 1936 to N/A	Active cement plant and quarries
Karst Asbestos Mine	Asbestos Mine	Gallatin Gateway	Gallatin	Operated from 1890s to 1976	Inactive asbestos mine
Mercer Post Plant		Bozeman	Gallatin	Operated from 1970 to 1974	Inactive wood treating facility
Pine Tree Timber	Belgrade Post and Pole	Belgrade	Gallatin	Operated from 1986 to 1991	Inactive wood treating facility

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Summit Dana Ltd	Summit & Dana Industries - Summit-Dana Inc	Bozeman	Gallatin	Operated from 06/01/78 to Unk	Inactive electronics manufacturing facility
Burlington Northern Livingston Shop Complex	MRL Livingston Rebuild Center - Livingston Railyard	Livingston	Park	Operated from 1883 to the present time	Active railyard fueling and repair facility
Jardine Arsenic Tailings		Jardine	Park	Operated from 1989 to	Historic Mining
McLaren Mill Tailings	McClaren Mill Tailings	Cooke City	Park		Historic mining and tailings
Mission Wye	BN Mission Wye	Livingston	Park	Operated from 1955 to 1979	Inactive industrial landfill
New World Mine	Henderson Mountain	Cooke City	Park		
Strong's Post Yard		Livingston	Park	Operated from 1970 to 1973	Inactive wood treating facility
Yellowstone Bridge Asbestos		Livingston	Park		Railroad tracks - abandoned

Leaking Underground Storage Sites

The District has over 300 leaking underground storage tanks in the District: 211 in Gallatin County and 97 in Park County. Of those, only 55 across the District are active: 42 in Gallatin County and 13 in Park County. Nineteen of the sites in Gallatin County are high priority, while four sites in Park County are high prioritization.

Name of Site	Address	City	County	Date listed	Priority Level
ME & JANS II #250	621 W MAIN ST	BOZEMAN	GALLATIN	24-Mar-94	1.1 - High Priority/Emergency response
CONOCO PHILLIPS BOZEMAN TERMINAL#378	318 W GRIFFIN DR	BOZEMAN	GALLATIN	17-Dec-92	1.3 - High Priority Remediation
WHITMANS CONOCO INC #410	136 CANYON ST	WEST YELLOWSTONE	GALLATIN	09-Oct-94	1.4 - High Priority Characterization
GALLATIN FARMERS CO E MAIN ST #416	101 E MAIN ST	BELGRADE	GALLATIN	11-Oct-94	1.3 - High Priority Remediation
FORMER HUSKY OIL #712	620 W MAIN ST	BOZEMAN	GALLATIN	25-Apr-95	1.3 - High Priority Remediation
I 90 EXXON #1751	1420 N 7TH AVE	BOZEMAN	GALLATIN	01-Jul-97	1.3 - High Priority

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					Remediation
I 90 EXXON #2212	1420 N 7TH AVE	BOZEMAN	GALLATIN	27-May-98	1.3 - High Priority Remediation
JAMES C PHILLIPS #2238	800 E ASH ST	THREE FORKS	GALLATIN	15-Jun-98	1.4 - High Priority Characterization
WILLIAMS PUMP & PAK INC #2334	2020 N 7TH AVE	BOZEMAN	GALLATIN	03-Sep-98	1.4 - High Priority Characterization
FOUR WHEEL DRIVE PRODUCTS INC #2362	915 E MAIN ST	BOZEMAN	GALLATIN	07-Oct-98	1.3 - High Priority Remediation
WILLIAM ROBERT EDWARDS #2405	3443 KENT SPUR RD	BOZEMAN	GALLATIN	22-Oct-98	1.4 - High Priority Characterization
DOUMA BUS BARN GARAGE #3143	102 N 5TH ST	MANHATTAN	GALLATIN	09-Apr-01	1.4 - High Priority Characterization
STAGE COACH INN CORP #3358	209 Madison Ave	WEST YELLOWSTONE	GALLATIN	29-Jan-02	1.4 - High Priority Characterization
COLLEGE EXXON SERVICE STATION #3383	723 S 8TH AVE	BOZEMAN	GALLATIN	07-Apr-02	1.4 - High Priority Characterization
Mount Ellis Academy #3847	3641 BOZEMAN TRAIL RD	BOZEMAN	GALLATIN	20-Oct-03	1.4 - High Priority Characterization
BIG SKY CHEVRON #4199	920 W MAIN ST	BOZEMAN	GALLATIN	06-Apr-03	1.2 - High priority Remediation - FP
WESTGATE STATION #4448	11 YELLOWSTONE AVE	WEST YELLOWSTONE	GALLATIN	15-Oct-09	1.2 - High priority Remediation - FP
KWIK WAY 32 #4599	401 E PEACH ST	BOZEMAN	GALLATIN	26-Oct-11	1.4 - High Priority Characterization
THRIFTWAY CONOCO 15 #4919	5 S MAIN ST	THREE FORKS	GALLATIN	31-Jul-16	1.4 - High Priority Characterization

Hazard Chemical Manufacturers or Storage

The District does not contain any hazard chemical manufacturers. The EPA notes that four sites within Gallatin County qualify as “Toxic Release Sites”:

Business

Location

Chemicals

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Darigold	Bozeman	nitrate compounds, nitric acid
Corbond Corporation	Belgrade	dichloroethylene
JTL Group DBA Knife River	Belgrade	Polycyclic aromatic compounds
Holcim/Trident Plant	Three Forks	chromium, lead compounds, mercury compounds

Manufacturers and Users of Pesticides

There are no manufacturers of pesticides within the District, but the predominant agricultural nature of the District’s land base does mean that pesticides are present in drinking water in Gallatin County. Park County has not had pesticides detected. The Montana Natural Resource and Conservation office notes the following pesticides present in Gallatin County:

Chemical Detected	Type	Common Pesticide Trade Name	Common Uses
2,4-D	Herbicide	Lawn Weed Killer, Broadleaf Killer, Brush and Weed Killer #6, 2,4-D amine, Weed-X	Broadleaf weeds in small grains, flax, pasture, rangeland, industrial and lawn.
Atrazine	Herbicide	Aatrex 4L, Cinch AT2	Selective herbicide for control of broadleaf and grassy weeds in corn and sorghum. It is used also used for nonselective control of vegetation in chemical fallow. Atrazine can also be used as a nonselective herbicide for vegetation control in noncrop land (roadside maintenance).
Clopyralid	Herbicide	Momentum, Trupower, Battleship, Curtail, Hornet, Transline, Stinger, Confront	Controls broadleaf weeds, especially thistles and clovers in lawn and turf, range, pasture, rights-of-way, sugarbeets, mint, canola, and wheat.
Deethyl atrazine	Herbicide - metabolite	Aatrex 4L, Cinch AT2	Selective herbicide for control of broadleaf and grassy weeds in corn and sorghum. It is used also used for nonselective control of vegetation in chemical fallow. Atrazine can also be used as a nonselective herbicide for

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			vegetation control in noncrop land (roadside maintenance).
Diuron	Herbicide	Surfire, Scorch, Dibro, Magnum24, StaKill, Topsite, Diuron, Velpar, Direx, Clean Crop, Bandit, Karmex, Saraha (w/Imazapyr)	Annual and perennial broadleaf and grassy weeds including mosses in wheat, alfalfa, and non-cropland.
Hexazinone	Herbicide	Velpar, DPX 3674, Hexazinone liquid, Outstar, K-4, Pronone	Systemic control of annual, biannual, perennial weeds on non-cropland and alfalfa.
Imazamethabenz methyl acid metabolite	Herbicide - metabolite	Assert	Used for controlling wild oats and several broadleaf weeds in spring and durum wheat, barley and sunflowers.
Imazamethabenz methyl ester	Herbicide - metabolite	Assert	Used for controlling wild oats and several broadleaf weeds in spring and durum wheat, barley and sunflowers.
Imazapyr	Herbicide	Arsenal, Hi-Yield Topsite, Truce, Lightning, Sahara (w/diuron)	Grasses and broadleaf weeds in beans, peas, alfalfa and tolerant corn; bareground weed control on non-crop area.
Imidacloprid	Insecticide	Kohinor, Admire, Advantage, Gaucho, Merit, Confidor, Hachikusan, Premise, Prothor, and Winner.	Systemic control of pests in structures, turf, potatoes, sugar beets, corn, canola, and small grains. Also marketed and used as a seed treatment.
MCPA	herbicide	Triamine II, Tri-Power, Chemlawn, Trimec Eliminate	Broadleaf weeds in small grains, flax, pasture and rangeland.
MCPP	Herbicide	Agway Lawn Weed Killer, K Gro Liquid, Enforcer, Trio	Selective, hormone-type agent for broadleaf weed control. Used commonly in household weed killer products and 'weed and feed' type mixes for use in ornamentals and sports turf, for forest site preparation, and on drainage ditch banks and on wheat, barley, and oats cereal crops.

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Methomyl	Insecticide and acaricide	Lannate, Lanox, Methavin, and Nudrin	Broad spectrum, contact and systemic insecticide and acaricide used for foliar treatment of vegetable, fruit and field crops, cotton, commercial ornamentals, and in and around poultry houses and dairies. Crops are alfalfa, barley, succulent and dry beans, oats, onions, succulent peas, potatoes, rye, sugar beets, sweet corn and wheat.
Metolachlor ESA	Herbicide	Turbo 8EL, Drexel, Trizmet, Stalwart Extra, Metolachlor, Broadstrike, Dual II, Pimagram, Bicep, CGA-24705, and Pennant	Grass control in corn.
NOA 407854	Herbicide (Pinoxaden metabolite)	Axial XL	post emergence control of grass weeds in wheat and barley
Picloram *	Herbicide	Tordon, Outpost, Grazon, Picloram, Hirehand, Gunslinger, Triumph, Trooper	Systemic herbicide used for control of woody plants and a wide range of broad-leaved weeds on rangeland and pasture. Most grasses are resistant to picloram. Commonly mixed with other herbicides.
Prometon	Herbicide	Ontracil 800, Pramitol 25 E, Prometon, Total Weed Killer, Bonide, Dragon, Triox, Weed and Grass Killer	Pre- or post emergent non-selective, long lasting weed control on non-cropland (industrial use).
Tebuthiuron	Herbicide	Graslan, Strike, Sterilan, Rainbow Weed Killer	Broad spectrum weed control in non cropland, rangeland, and right of way.

Brownfield Sites

The only Brownfield site in the District is the Davis Post and Pole site in Willow Creek. Davis Post Yard, on Broadway Street between Second and Third Avenues in Willow Creek, is an inactive, less than one-acre former wood treating facility, which operated from the 1950s through the mid-1960s. A neighbor ran a small operation on the site and used pentachlorophenol (PCP) in a dip vat.

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The site is located in Willow Creek within 20 feet of residences. Residents obtain their drinking water from domestic wells. The nearest well is 50 feet from the treatment tank. The nearest surface water is Irish Slough, about 400 feet to the southeast, and a small, unnamed tributary of the Jefferson River about 700 feet to the west. The site was not fenced when the Montana Department of Health and Environmental Services (MDHES) first investigated it, but has since been fenced by the owners.

A June 1991 MDHES-CECRA site investigation, in response to a citizen report, found standing liquid and a thin layer of sludge in the treatment vat and soils around it stained from drippage. The sludge in the treatment tank and the soils around the tank were contaminated with PCP and petroleum hydrocarbons. MDHES notified the property owners, who worked cooperatively with MDHES oversight to reduce hazards at the site.

In 1992, property owners fenced the site to keep people and animals out and covered the treatment tank to prevent precipitation from increasing the volume of contaminated liquid.

Between July 1996 and April 1997, a graduate student in Soils at Montana State University Bozeman, periodically collected soil and plant samples from the site for use in her thesis project. MDHES had soil samples collected analyzed for dioxins/furans in December 1996, and results showed high concentrations present in onsite soils.

A 1998 EPA time-critical fund-lead removal action excavated the contaminated soils and removed the dip tank and accompanying sludge. A monitoring well was installed onsite to monitor groundwater contamination. EPA left the monitoring of the site to The Montana Department of Environmental Quality (DEQ; formerly MDHES).

A July 2002 site investigation sampled the onsite monitoring well and three nearby residential wells. The residential wells were all non-detect for PCP. One of the residential wells was analyzed for all the same parameters as the monitoring well (PCP, PAH, EPH, and dioxins/furans), as it was the closest and down gradient well. It was non-detect for all of the parameters measured. The analysis of samples from the monitoring well showed the presence of PCP and dioxins/furans in onsite groundwater.

As part of a Targeted Brownfield's Assessment (TBA), the onsite monitoring well and three nearby residential wells were sampled in September 2004. The residential wells were all non-detect for PCP. As in 2002, one of the residential wells was analyzed for all of the same parameters as the monitoring well (PCP, PAH, EPH, and dioxins/furans). That residential well was non-detect for all of the parameters measured. The sample from the monitoring well contained PCP and dioxins/furans. While PCP concentrations in groundwater are continuing to decrease, dioxins/furans are present at high enough concentrations to indicate that the source area may not have been completely removed in the 1998 removal action.

The 2006 TBA activities included: the sampling for PCP and dioxin/furans of the onsite monitoring well and nearby residential well, installation and sampling of two new monitoring wells down gradient from the facility, and the sampling of both surface and subsurface soil samples on and off site. While the residential well was non-detect for all parameters measured, the monitoring wells continued to confirm PCP and dioxin/furan contamination. The additional soil sampling suggests that a contaminant source area is still present at the site. DEQ is in the process of analyzing the latest results and using them to calculate risk-based remediation goals for soil and groundwater at this facility.

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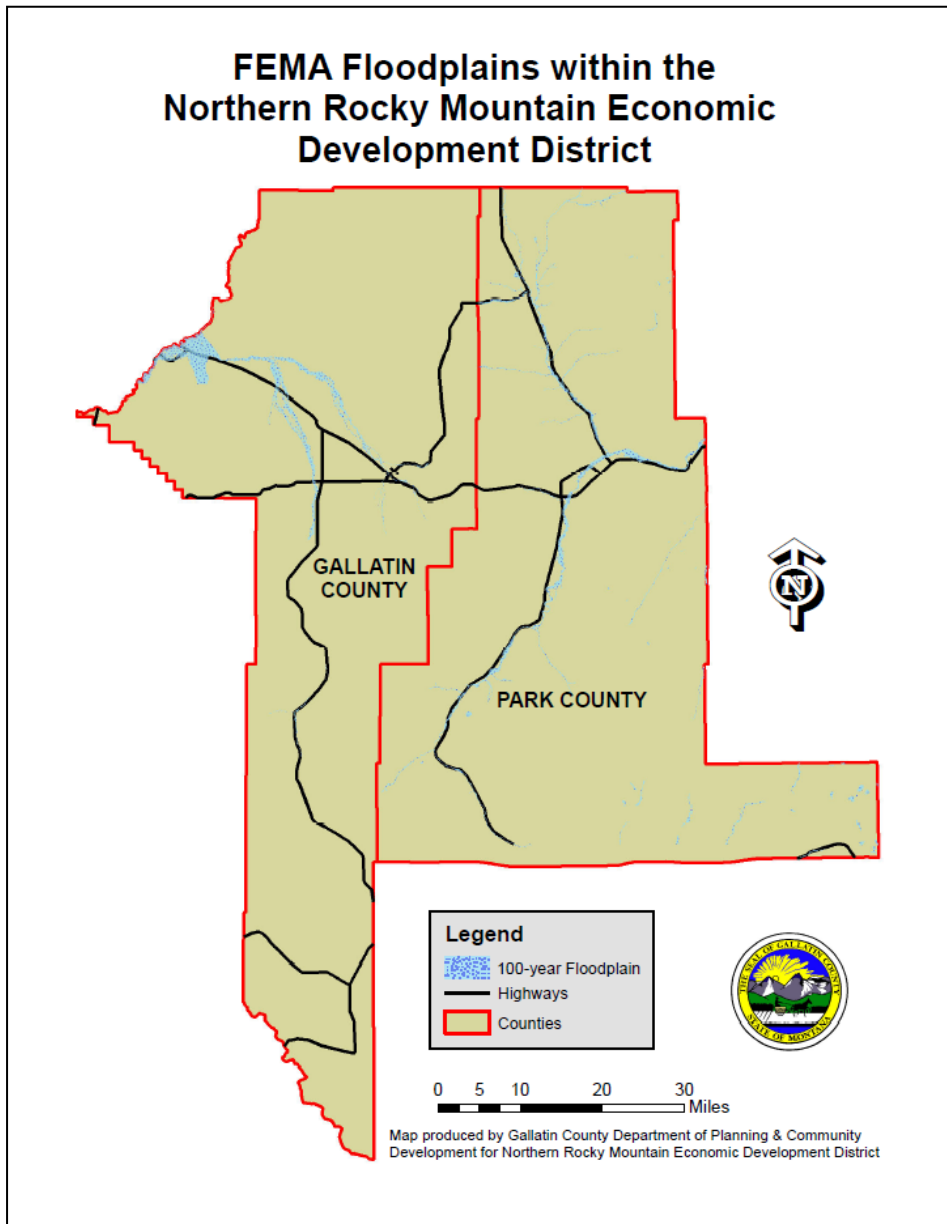
DEQ-CECRA program is the lead regulatory program for the site and ranked it a medium priority. Remaining contamination at the site will be addressed via a Targeted Brownfield's Assessment, as funding allows.

Sole Source Aquifers for Drinking Water

There are no sole source aquifers for drinking water in the District.

100-Year Flood Plains

Several FEMA floodplains are within the boundaries of the District. These floodplains follow the major rivers such as the East and West Gallatin River, the Missouri River, and the Yellowstone River. These floodplains have bearing on future development potential of some portion of the District. Specifically, the City of Livingston and Town of Three Forks will need to be cognizant of floodplain issues as they look to develop within those communities.



Map 8: FEMA Floodplains, NRM EDD

Archaeological, Historic, Prehistoric, or Cultural Sites

The District has a wide variety of historic, prehistoric, and paleontological sites:

	Gallatin County	Park County	Total
Archaeological Sites	592	450	1,042
Historic Sites	532	390	922

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Paleontological Sites	12	14	26
Total	1,136	854	1,990

Out of these previously recorded sites, 101 sites in Gallatin County and 25 sites in Park County have been listed on the National Register of Historic Places. All of the sites on the Nation Register are located in the historic downtowns of communities throughout the District. While most of the properties on the Register are historic homes, churches, or neighborhoods in historic residential districts, a few properties will need to be accounted for in cases of redevelopment:

- The Bozeman Armory
- The Bozeman Bon Ton District
- Bozeman Brewery Historic District
- Gallatin Gateway Inn
- MISCO Grain Elevator
- Northern Pacific Story Mill Historic District
- West Yellowstone Oregon Shortline Terminus Historic District
- Livingston Commercial District

N. Federal, State, and Local Resources

Partnerships With Local Resources

As noted above, one of the primary roles of the District is to coordinate between and partner with the various other entities working on development issues in the region. The District intends to work closely with numerous local resources, including partnering with staff of both Gallatin and Park Counties as well as the economic development director for the City of Bozeman. The District will continue to be partially supported by financial contributions from each of the counties as well as all incorporated cities in the District. The District has already developed significant partnerships with these local government entities during the course of the CEDS process and hopes to continue building on this existing foundation as the work moves forward.

The District also intends to work closely with many of the obvious development partners such as Prospera Business Network and the various chambers of commerce throughout the District; additionally, the District hopes to coordinate activities with many of the other organization working on regional prosperity through both counties. These include the larger infrastructure entities, such as Montana Rail Link and the Bozeman Yellowstone International Airport, that connect communities in the District with the larger world. These also include other entities critical to the character, quality of life, and employment of the District such as Montana State University (the region's largest employer), Bozeman Deaconess Hospital (the hub of the area's health care industry and the second largest employer in the District), and Yellowstone National Park (one of the primary tourist draws in the region).

Partnerships With State Resources

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Additionally, the District will partner with MEDA, Montana's economic development association, to coordinate with other economic development districts throughout the state. With its low population, Montana's economic development organizations often work closely together to address issues that help the state as a whole. Likewise, the District intends to work closely with the Governor's Office of Economic Development to ensure resources are coordinated in an efficient manner. A recent example of this coordination began when the Governor's Office of Economic Development recently commissioned a study to better understand the optics cluster in Gallatin and Park Counties; the District is now taking the lead to extend that work by helping the 28 companies in the optics industry located in the District to explore ideas of cluster development and formation of an association.

Another recent example of coordination between the District and the other organizations in the state include work conducted for the CEDS. Prior to hiring the District's Executive Director, the District Board coordinated with MEDA for support with CEDS community meetings. MEDA worked with the Board to design meetings in both Livingston and Belgrade to gather information on local businesses and industries, projects, and challenges. Those reports are included in the appendices of this document.

Partnerships with Federal Resources

Federal resources have already been tapped by several local governments in Gallatin County to build the \$38 million airport interchange off Interstate 90. The District hopes to continue to develop these relationships in order to most efficiently use federal support for large-scale infrastructure projects.

Future Partnerships

Finally, Montana elected a new governor during the election of 2011 and the District has already begun reaching out to both the Governor's director of Economic Development as well as the new director of the Montana Department of Commerce (who is from Gallatin County). The District Board and Staff hope to quickly develop relationships with the new administration to begin immediate coordination of economic development support to the District.

Chapter 3: The NRMEDD Region - Economic Challenges and Potential

The last several years have seen dramatic change in the economy of Gallatin and Park counties. While the first part of the decade saw record growth, building, and development, the recession of 2008 had a deep impact on the district economy. As an example, housing permits in the city of Bozeman paint a powerful picture: 84% of the decade's homes were permitted or built between 2001 and 2007; permits dropped precipitously afterward, with only 3% of the decade's total being permitted by 2011.

While housing permits and construction provide stark illustration of the impact of the recession over the past several years, this is only part of the picture. More than 80% of the job growth in the past decade came in the "services" sector. A significant portion of the services sector include professional services such as architects, attorneys, engineers, finance and real estate, insurance, and similar services – many of which are associated with the growth and development industry. When the housing recession of 2008 hit Gallatin County, all of these industries were hurt.

While the District's economy was impacted by the recession, the area still retains remarkable and unique assets. Gallatin County is a gateway to Yellowstone National Park and, with two world-renowned ski resorts, Montana State University, excellent regional health care, and spectacular outdoor recreation, remains a highly desirable to live, work, and raise a family.

In 2012, several meetings were held throughout the District to discuss the strengths, weaknesses, opportunities, and threats. Additionally, dozens of individual surveys were collected to round out the public meetings. The following summarizes the findings of that process.

During this process, the NRMEDD partnered with a variety of local entities, including Gallatin County, Park County, the City of Bozeman, the City of Livingston, the City of Belgrade, the Montana Economic Developers Association, and the Montana State University Local Government Center to host events and analyze information. The NRMEDD 2012 CEDS data collection process included:

1. The City of Bozeman Economic Development Plan (2009) with 250 business survey responses.
2. The 2012 Economic Summit co-sponsored by the NRMEDD and the City of Bozeman.
3. The 2012 Montana Economic Developers Association workshops held separately in Belgrade and Livingston, MT.
4. Public meetings and workshops sponsored by the NRMEDD in the outlying communities of West Yellowstone, Gardiner, Cooke City, Wilsall, and Clyde Park. Individual questionnaires collected from community leaders throughout the District. An on-line input form available on the NRMEDD website.

The process of gathering community-input was managed using a SWOT-analysis model. SWOT provides the structure to identify internal and external factors necessary to achieve an objective and the findings are categorized as either favorable or unfavorable.

Strengths: attributes favorable to achieving the objective.

Weaknesses: attributes unfavorable to achieving the objective

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Opportunities: favorable external factors

Threats: unfavorable external factors that could prevent achieving an objective

Community input involved hundreds of local citizens who participated in open meetings, workshops and on-line surveys. In total, the local meetings were attended by more than 300 businesses. More than 350 pages of comments and analysis were created, and the *strengths/opportunities* and *weaknesses/threats* are summarized below.

Additionally, strengths, weaknesses, opportunities, and threats were also assessed by a review of local and regional planning documents. A more complete list of documents used to inform the District's SWOT analysis can be found in Appendix A; in brief, the following documents were used to inform the SWOT analysis below:

- Available Capital Improvement Plans for Gallatin County, Park County, the City of Livingston, the City of Bozeman; the Town of West Yellowstone
- Growth Policies (comprehensive plans) for both counties as well as the City of Bozeman, the City of Livingston, the City of Belgrade, and the Town of Manhattan;
- Transportation Plans for the City of Bozeman, the Town of Manhattan, the Greater Bozeman Area Transportation Planning Jurisdiction, the
- Workforce Needs Analysis for the greater Bozeman Area;
- Impact Fee studies for the Cities of Bozeman and Belgrade as well as the community of Big Sky;
- The previous CEDS documents for both Park and Gallatin Counties;
- The City of Bozeman Affordable Action Plan;
- The City of Bozeman Economic Development Plan;
- Montana Business Quarterly;
- Gallatin and Park County Hazard Mitigation Plans;
- Montana State University Draft Five Year Vision Plan 2013-2018;
- Montana State University Economic Impact Report;
- Montana Economic Developer's Association Resource Team assessments for Belgrade and Livingston;
- Montana Department of Labor Economic Profiles for both Gallatin and Park Counties;
- Prospera Business Network's Economic Profile of both Gallatin and Park Counties;
- Montana Department of Transportation Aviation Division's State Aviation Systems Plan;
- University of Montana's Institute for Tourism Research, The Economic Review of Tourism in Montana

A. STRENGTHS/OPPORTUNITIES

Gallatin and Park Counties have a remarkable set of assets. Fantastic recreation opportunities, high-quality educational systems, and small-town atmosphere make for a spectacular quality of life. Proximity to Yellowstone National Park, as well as world-class skiing and trout streams, provides an enviable quality of life for residents as well as a strong tourism industry. The small town atmosphere of the District's cities and towns provide a wonderful place to live, work, and raise a family.

The State as a Whole

The State of Montana is a wonderful place to live, work, own a business, and visit. According to the May 2010 U.S. Chamber of Commerce and the National Chamber Foundation report, Montana is a *national leader of entrepreneurial activity* (*Prospera 2011 Economic Profile*). In 2011, a Montana woman-owned enterprise was voted the U.S. Small Business Administration's 'National Champion of the Year'. Montana is a great place to have and grow businesses, and Gallatin and Park Counties are integral components of the State's economic engine.

A Spectacular Natural Setting

Proximity to Yellowstone National Park, two ski resorts, world-class rivers, access to National Forest land with thousands of miles of trails, and the beautiful agricultural landscapes found throughout the District provide a rich environment for locals and tourists alike. The spectacular natural setting of the District continues to attract new residents as well as a robust tourist population. A thriving outdoor industry has sprung up around these amenities and provides enormous benefit to the District through retail sales of gear, food, transportation, guiding services, lodging, and entertainment. Additionally, a number of outdoor industry manufacturers are located throughout the District, attracted by the same amenities as residents and tourists alike.

Montana State University, Educational Opportunities, and a Highly Educated Workforce

Montana State University adds a unique cultural element to the District, generating a highly educated workforce and providing a variety of cultural opportunities. The investments in research at MSU exceed over \$100 million annually, and connections between the university and the business community have created a thriving technology sector.

In addition to MSU, the District boasts a high-quality education environment. Gallatin College provides an increasing selection of workforce training opportunities, and both public and private schools provide excellent educational opportunities for youth. More than 40% of Bozeman residents have a college degree, and a variety of opportunities exist for additional education and workforce training opportunities.

A Thriving Technology and Biotechnology Sector

The presence of MSU drives a thriving technology sector throughout the District. The Technology Transfer Office at MSU provides an interface between the university and the private sector, and tens of millions are expended each year in research grants. MSU TechLink provides direct support for Montana companies to access new technology, expertise, and research and development funding. Three major technology companies, Right Now Technologies, Zoot Enterprises, and Printing for Less, also count among the largest employers in the District. A variety of entrepreneurial activity exists around these larger companies, creating a strong technology and knowledge-based sector.

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Additionally, the District also includes an impressive biotechnology community with dozens of companies working in microbiology, biomed implants, biotech, medical devices, immunology technology, cancer treatment pharmaceuticals and biological indicators.

Regional Retail Economic Hub

The District is serves as a regional trade center for Southwest Montana. From the retail chain shopping opportunities provided by the North 19th Avenue corridor and the Bozeman Mall to the thriving downtowns throughout both counties, the District provides options for both residents and tourists alike. Interstate 90 and the Bozeman Yellowstone International Airport provide efficient access for goods flowing in and out of District businesses. Additionally, these opportunities for regional consumers also provide opportunities for employees within the boundaries of the District.

Access to Transportation

The District has access to several major transportation options which allow for efficient movement of not only goods and services into and out of the District, but also provides increased tourist opportunities for visitors. The District is bisected by Interstate 90, a major transportation corridor connecting Chicago and the Midwest with Seattle and the west coast. In 2012, a federal TIGER grant was awarded to construct a new airport interchange outside of Belgrade along I-90; construction of the new interchange provides significant opportunity to not only provide a more efficient transportation route for visitors hoping to experience the amenities of Gallatin and Park Counties as well as Yellowstone National Park, but also opportunity for business park development immediately adjacent to the airport.

Additionally, the Bozeman-Yellowstone International Airport has seen regularly increasing deboardings, with 2011 reaching a new record and placing the airport as one of the top two in the state. The airport itself has expanded, adding 125,000 square feet, three additional gates, and an additional baggage claim carousel. Direct flights now provide daily or weekly flights to Denver, Salt Lake City, Seattle, San Francisco, Las Vegas, Phoenix, and Minneapolis/St. Paul, and seasonal direct flights to Portland, Atlanta, Chicago, and New York. Bozeman Yellowstone International Airport is the only airport serving as a year-round entrance for two Yellowstone National Park entrances. The airport also serves Big Sky Resort, Moonlight Basin, and Bridger Bowl Ski Area.

Railroad: Montana Rail Link (MRL) operates the railroad that east/west bisects Gallatin and Park counties. The railroad represents a major economic asset to the NRMEDD area. Discussions with industry representatives indicate that MRL produces the following:

- MRL investment in 2012/2013 that will translate into approximately \$40 million in annual payroll.
- Investments will directly impact the Gallatin/Park District with 50 to 75 jobs (average payroll of \$67,000 not including benefits).
- MRL spends \$6.6 million for goods and services in District markets.
- MRL ships 5,000 car loads annually to and from the District
- MRL pays approximately \$700,000 in taxes to Gallatin County and \$600,000 to Park County.

Currently 15 trains pass through the Bozeman area each day and the rail line is under constant review for delays at its crossings, noise issues and the products transported. A study at the Rouse Avenue (Bozeman) crossing showed that the average delay was 2 minutes and 56 seconds; the longest recorded delay was 6 minutes and 52 seconds. Coal is currently the most controversial commodity transported by the rail line. Two or three of the 15 trains a day carry coal west, primarily from the Powder River Basin

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of eastern Wyoming and Montana. The number of trains could increase if shipping ports are expanded to accommodate sales of Montana and Wyoming coal to Asia.

The Arts and Culture

The District is home to a thriving arts scene and a vibrant cultural atmosphere. Galleries populate the main streets of several towns and smaller communities, and artists draw inspiration from the District's spectacular natural setting and small-town way of life. The Emerson Cultural Center in downtown Bozeman provides gallery space for resident artists as well as classes and cultural opportunities for residents, and the Ellen Theater on Bozeman's Main Street showcases multiple theater events as well as the Bozeman Opera. Livingston is home to a large artist community and boasts 14 galleries owned and operated by regionally and nationally famous artists, providing it with a uniquely creative arts culture. In addition to the visual arts, multiple cultural opportunities exist throughout the District. The Museum of the Rockies, the Bozeman Children's Museum, the Livingston Depot Museum, the Yellowstone Gateway Museum, the Emerson Cultural Center, the Ellen Theater, and multiple small theaters and theatrical groups provide for a lively cultural experience throughout the District's communities.

Tourism

The spectacular natural setting of the District has always held a strong draw for tourists. The District boasts two entrances to Yellowstone National Park as well as two ski resorts, wilderness access, and multiple world class rivers that draw tourists from around the world. The expanded Bozeman-Yellowstone International Airport and Interstate 90 give tourists efficient access to all that the District has to offer, including not only the natural amenities but also the District's historic small towns and thriving main streets.

Forward-Thinking and Accessible Local Government

Even with the population growth of recent years, local governments in the District remain accessible. Most of the communities within the District have or are preparing Capital Improvement Plans (CIPs) to guide future investment and development, and a number of partnerships have developed between various local governments as well as with partners such as Bozeman Deaconess Hospital and Montana State University. Both the City of Bozeman and Park County have appointed local Economic Development Boards, and the City of Bozeman has an adopted Economic Development Plan.

Thriving Town Centers

Towns throughout the District have flourishing downtowns and adjacent neighborhoods, with historic architecture, walkable streets, downtown events, professional offices, and a wide variety of shopping opportunities creating thriving town center experiences for residents and visitors alike.

Nonprofits, volunteer opportunities, and philanthropy

A significant number of opportunities exist for District residents to get involved in volunteer activities. Numerous non-profits, from health and human service organizations to sports associations to conservation groups, play a significant role in providing civic opportunities as well as employment for District residents. Additionally, both Park and Gallatin Counties have community foundations which provide opportunity to give back and invest in the community.

Healthcare

Bozeman Deaconess Hospital serves as the healthcare center of southwest Montana as well as the second largest employer in Gallatin County (second only behind Montana State University). Livingston HealthCare is the largest employer in Park County. In addition to Deaconess, Community Health Partners maintains a strong presence in the District helping low income clients, and a wide variety of clinics and practitioners provide care throughout both Gallatin and Park Counties.

Opportunities for Entrepreneur Growth Programs

There is a need for economic development solutions that can identify companies that have the potential to expand and hire new jobs. Technologies are available to mine data and map growth candidates. Economic assistance can range from market intelligence to manufacturing assistance.

B. WEAKNESSES/CONCERNS

The Recession of 2008

The economic downturn and recession of 2008 hit the region harder than was first realized. Layers of statistics now demonstrate the adverse impacts to the area but more disconcerting is the uneasiness over how the negative economy is translating to individual companies. Community leaders are questioning how are their businesses maintaining during these difficult times and, how are they not? They are also asking what important companies may be lost if nothing is done to save them and which can be saved if the appropriate resources are timely applied?

Housing and Construction

The recession caused a decline in area employment which was accompanied by reduced incomes and a decreased ability to afford housing. A 2012 report shows 6,000 (Bozeman) household live in unaffordable housing (City of Bozeman Affordable Housing Plan 2012-2016). Homes for sale and rental properties have both become more affordable since the recession. The Montana Business Quarterly, Spring 2012, reported 'Montana continues to be the slow recovery from the recession and unfortunately, the housing bust'. Construction was an economic mainstay for the two county district. The prevailing consensus is that housing and its associated residential real estate market will not improve until there is a recovery in the national economy. The information gathering process showed the lack of affordable housing is particularly impacting the elderly.

Health Care

Health care represents 10 percent of Montana's economy (GDP). One in five Montanans will be eligible for Medicare in this next decade. The Affordable Care Act (ACA) will be a major economic issue in the NRMEDD region. An estimated 17% of Montana residents do not have health insurance. Montana Governor Brian Schweitzer says: "We are reviewing the decision [Supreme Court decision on the ACA]. Unlike the federal government, Montana can't just print money. We have a budget surplus and we're going to keep it that way. The federal law means Montana's Medicaid population will double. ... Preliminary estimates ... indicate an additional 84,000 people will be eligible for Medicaid here by 2019 — at an estimated cost of more than \$1.2 billion by the same year. With Montana's share of the bill estimated at \$71 million, a new approach to controlling health care costs is needed. There are still a lot of unanswered questions." <http://www.usatoday.com/news/nation/story/2012-07-12/states-health-care-status/56181438/1>

Many of the District's smaller communities lack a modern hospital and their service is limited to small clinics. Some areas also lack a local pediatrician and dental care.

Fuel Prices

The NRMEDD has three communities that border Yellowstone National Park and thus the district economy is greatly impacted each year by thousands of tourists. Fuel prices climbed steadily throughout 2011 and into the spring of 2012. While prices are now tracking a falling economy, the overall high pump prices are threats to Montana tourism dollars. Local meetings identified several additional tourism constraints as follows:

- Lack of communication between local groups and organizations focused on tourism;
- Lack of coordinated branding – there have been some efforts but nothing is final;
- Need for better tourist accommodations;
- Need for more incentivized vacation packages;
- Need for a positive local attitude towards attracting tourism;
- High cost of airfare to/from the area is constraining tourism and business growth;
- Some local people are anti-tourism, especially when large events come to town.

Challenges for Agriculture

The land base of the district is heavily agricultural, and agriculture is tied to larger externalities. The environment of the District constrains the kind of agricultural production we can engage in, and the past decade has seen heavy development pressure on many of the best soils. Additionally, while new growth has brought many positives, there has been increasing pressure on agricultural operations.

Corn Prices: Farmers in Gallatin and Park counties do not grow a lot of corn; they do grow a lot of wheat and raise a lot of livestock. It is the nature of commodities that the price of corn often impacts the price of both wheat and livestock. Ethanol is largely derived from corn and its price has benefited from blender-subsidies and tariffs on imported ethanol. There is a threat to lower renewable fuel standards and subsidies which could cause corn prices to move lower and possibly threaten profits for Montana wheat, cattle and calves.

Value-add to local Agriculture products: Growers, bankers and community leaders recognize that adding-value to agriculture products is good business. Citizen meetings identified several challenges including the capital cost of establishing processing facilities, the distance to major markets, competition from large firms whose pricing undercuts local value-added products. Information gathered in the local workshops indentified the following additional agriculture-related constraints:

- The time and money to meet regulatory issues of getting your product to consumers
- The cost of liability insurance
- The availability of food processing and preserving facilities
- Fragmentation of family farms – in some cases farms are unable to sustain growing families
- Labor – paying payroll tax and workman’s compensation fees
- Developing own market and delivery system is a challenge
- The commodities market is very complicated
- Non-compatible uses – conversion of prime land from ag to residential; how ag relates to subdivisions.
- Water – problems will only grow in the future
- Maintaining sufficient agriculture workforce – even when benefits are provided.

Lack of diversity in local economy

The recession of 2008 showed that much of the District's economy was focused on real estate and construction and the constellation of industries dependent on those sectors. There is a strong need to diversify the District's economy.

Energy Costs

Manufacturing is not the major source of employment in Gallatin and Park counties, but it is an important sector that produces some of the area's highest average payrolls. A survey of 120 Montana manufacturers conducted by the Montana Business Quarterly showed that energy costs were the greatest concern for more than half of the companies.

Labor

Constraints to retaining and attracting key labor include the lack of technical skilled persons and limited vocational or technical classes. There is a need for creating year-round employment opportunities for seasonal employment; and educating a relatively small labor force to meet the increasing demands for technically skilled workers. One labor problem is actually being created by an economic boom on the eastern side of Montana. The largest on-shore oil discovery in the continental United States in 20 years is located in the Bakken oil fields of northeastern Montana and western North Dakota. The discovery has drained valuable technical labor from throughout Montana including the NRMEDD District.

Infrastructure

Local meetings and comments show the need to finance improvements for transportation and infrastructure. Several communities need three-phase power, Internet bandwidth, water, and waste water improvements. The prevailing belief is that the costs for many projects require subsidy but because of federal, state and local budget constraints projects will not see much help from the government. Comments gained from public meetings showed the area lacks meeting/convention space to accommodate facility related tourism.

Transportation

Currently 15 trains pass through the Bozeman area each day and the rail line is under constant review for delays at its crossings, noise issues and the products transported. A study at the Rouse Avenue (Bozeman) crossing showed that the average delay was 2 minutes and 56 seconds; the longest recorded delay was 6 minutes and 52 seconds. Coal is currently the most controversial commodity transported by the rail line. Two or three of the 15 trains a day carry coal. The number of trains could increase if shipping ports are expanded to accommodate sales of Montana and Wyoming coal to Asia.

Another issue is creating "quiet zones" along rail corridors, particularly in more-populated areas. Quiet zones include restricted use of train whistles and horns and more safety controls at select crossings. The State of Montana owns several of the railroad crossings and as owner is responsible for any applications to create the zones. The quiet zones are constructed with special safety precautions so train engineers can forego blowing their horns. The average cost for quiet zones is between \$350,000 and \$500,000.

Additionally, there is a need to create a multimodal facility that transfers container shipping from rail to truck and vice versa. Presently containers need to be returned and intermodal freight has not existed in Montana since 2001.

Quality of Life/Arts and Culture

The public comment phase showed broad support and concern for a lack of funding for trails, performing arts center, outdoor and indoor performing arts venues and capital for cultural development. There is also concern for the lack of activities to support youth programs, especially teenagers. There were comments encouraging both retail and art groups to work more cooperatively. Citizen input showed that in the down-economy, people have less money for fee-based leisure activities and the outdoors provides important alternatives.

Finance and Business Start-up Resources

Business and finance support for small businesses and startups has historically been fragmented and limited. There is need to strengthen the startup environment for high tech companies. Access to capital continues to be an economic constraint. There appears a particular lack of financial capacity for very large projects and funding rates different for different sectors. There were numerous comments regarding funding including banks typically do not provide start-up capital, need to fund tech companies, greater access to venture capital and constantly changing regulations.

Chapter 4: Regional Goals & Implementation

The Northern Rocky Mountain Economic Development District adopts the following vision and goals based on months of data collection and public input. Through their implementation, the vision and goals will provide a roadmap to guide the actions and priorities of the region. They will also serve to further a unified, coordinated regional approach for economic growth and stability. These goals will build upon the unique assets of the region to support key clustering industries and emerging entrepreneurial innovators to generate regional and local economic activity and capacity.

Vision

The District envisions that the place we all want to live is the same place that we can all succeed economically. We are committed to building a strong county economy that preserves our communities' character and resources while offering economic growth opportunities for our citizens.

We envision economically healthy, thriving communities with diversified economies including manufacturing, technology, links between our educational opportunities and economic sectors, agricultural economies, transportation opportunities linking our communities to each other and to the outside world, improved infrastructure, expanded retail opportunities, improved marketing, promotion and coordination of regional tourism, as well as attraction of outside investment for projects and activities with regional impact.

The seven goals implementing this vision are:

Goal 1: Promote economic diversity, entrepreneur growth, and business retention and expansion throughout the District

Goal 2: Foster effective transportation access and support development of major transportation assets like the railroad, airport and highways systems

Goal 3: Expand the capabilities of a skilled, highly educated, permanent, and full time workforce for local businesses

Goal 4: Serve as a District-wide forum for coordinating economic development discussion and initiatives

Goal 5: Promote the use of technology to advance economic development activities including better tools to measure and evaluate economic impacts

Goal 6: Build on our unique natural assets to develop and enhance our tourist industries

Goal 7: Maintain and enhance the District's physical infrastructure

The following section sets out specific projects around the District that help implement the goals and vision of this document. Due to staff constraints (as of 2013, the District only had one paid employee working ¾ time), the following projects have been prioritized according to the feasibility of being staffed by the District. Other projects that will be led by other entities (such as individual cities or other organizations) received lower prioritization.

Where possible, jobs to be added or impacted by a specific project were calculated. In the case of infrastructure projects, this was done using IMPLAN economic impact software. It should be noted that the projected jobs include both new jobs to be added as well as existing jobs to be affected. For other projects, more appropriate metrics were used (numbers of companies worked with, for example). Those metrics have been listed in the "performance evaluation and metrics" column in the charts below.

For all projects denoted as being led by the NRM EDD, it should be assumed that the funding source will come from the EDA and local matches to fund the work and salary of the District's Executive Director. Other projects (primarily infrastructure projects listed below in Goal 7) will be funded through a combination of local mill levies, special districts, bonds, and/or federal appropriations. Regardless of the project, the District will extensively coordinate with its local, state, and federal partners on implementation.

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Goal 1	Promote economic diversity, entrepreneur growth, and business retention and expansion throughout the District Note: Green represents High Priority projects, Yellow represents Medium Priority, Blue represents low priority					
Objective	Lead organization and implementation plan	Expected results	Performance measures and evaluation indicators	Number of expected jobs created	Potential Funding Sources	Schedule
Understand baseline business health across the District	NRM EDD - Conduct annual business health survey	Creation of baseline data to understand business health, especially in relationship with the national recession	Survey administered, data collected	Unknown	EDA planning grant and local match	2013 - 2018
Retain and expand existing businesses	NRM EDD - Provide services to existing Bozeman BEAR and Livingston BEAR programs	Businesses throughout the District are given direct help by District staff	District tracks its involvement with BEAR clients	Unknown	EDA planning grant and local match	2013 - 2014
	NRM EDD - Set up satellite economic development functions in outlying communities	The District effectively expands its work to all communities within its borders.	Creation of satellite teams	Unknown	EDA planning grant and local match	2013 - 2018
Provide direct support to specific entrepreneur growth clients (both entrepreneurs and existing businesses)	NRM EDD - Develop formal entrepreneurial growth program to serve companies with high growth potential Gallatin College will develop a Professional Certificate in Entrepreneurship	Businesses throughout the District with high growth potential expand	Number of businesses who become entrepreneur growth clients, success of those clients	Unknown	EDA planning grant and local match	2013 - 2018
Plan for expansion and creation of industrial and technology parks	NRM EDD and City of Bozeman - Assist with development of the Mandeville Farms property	The industrial, manufacturing, and technology sectors are diversified and expanded	Industrial and technology parks are created, businesses are located	Unknown	EDA planning grant and local match	2013 - 2018
	MSU Innovation	The technology	Technology	Unknown	EDA	2013 - 2015

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	Campus - Development of MSU Innovation Campus	sector is diversified and expanded	parks are created, businesses are located in them		planning grant and local match	
	NRM EDD – explore possibilities of industrial park development along I-90 corridor across the District	The industrial, manufacturing, and technology sectors are diversified and expanded	Impact assessment conducted, policy decisions are made	Unknown	EDA planning grant and local match	2013 - 2018
Encourage expansion of the tourism/recreation industries	City of Bozeman and NRM EDD – support tourism and recreation clusters	Develop and expand the existing tourism, recreation, and outdoor products cluster	Expansion of tourism, recreation, and outdoor products industry	Unknown	EDA planning grant and local match	2015
Promote and encourage companies in the District to buy and supply regionally	NRM EDD will develop a program promoting the value of buying locally	Local companies will be connected, local dollars retained	Program created	Unknown	EDA planning grant and local match	2013 - 2018
Provide for or conduct research and feasibility studies to identify new development opportunities	NRM EDD will use IMPLAN datasets to identify impact of new development opportunities	Development opportunities will be identified	Studies conducted, opportunities identified	Unknown	EDA planning grant and local match	2013 - 2018
Identify business opportunities based on the substantial flows of income to the regional economy from retirees, second-home owners, and other non-earned income sources	Feasibility studies in transportation and health care sectors conducted	Development opportunities will be identified	Studies conducted, opportunities identified	Unknown	EDA planning grant and local match	2013
Identify business opportunities based on the substantial flows of income to the regional economy from retirees, second-home owners, and other non-earned	NRM will work with local partners to identify local transfer of wealth opportunities	Transfer of wealth opportunities will be identified, partnerships will be developed	Opportunities identified	Unknown	EDA planning grant and local match	2013 - 2018

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income sources						
Create upgraded job opportunities and private investment by recruitment of new businesses and industries to diversify the regional economy, strengthen various economic clusters, and enhance other goals and strategies	NRM EDD will partner with Prospera and local communities to recruit new businesses to the economy	New businesses will be recruited, the local economy diversified, and new jobs created.	Number of business opportunities identified	Unknown	EDA planning grant and local match	2013 - 2018
Assess key retail trends and sales patterns and identify major property owners	NRM EDD will assist in conducting local studies to gather key data inputs	Data will assist in the efforts to site new business opportunities	Data collected, studies done, strategies crafted to site new business opportunities	Unknown	EDA planning grant and local match	2013
Assist in studies to evaluate local impact fees and their relation to economic development	NRM EDD will assist targeted communities assess their impact fees	Data will help local municipalities make informed decisions about impact fees	Data collected, studies done, impact fees modified or adopted	Unknown	EDA planning grant and local match	2013

Goal 2	Foster effective transportation access and support development of major transportation assets like the railroad, airport and highways systems					
Objective	Lead organization and implementation plan	Expected results	Performance measures and evaluation indicators	Number of expected jobs created	Potential Funding Sources	Schedule
Participate in regional transportation planning to ensure transportation needs are being addressed and priorities selected support economic development and community	Transportation Coordinating Committee, NRM EDD- meetings held with MT Rail Link, Bozeman-Yellowstone International Airport to identify opportunities	New opportunities for development along major transportation corridors, expanded relationships between transportation agencies and NRM EDD	Meetings held, development projects identified	Unknown	EDA planning grant and local match (for EDD portion)	2013 - 2018

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plans						
Identify development opportunities associated with major transportation systems	NRM EDD will conduct impact analysis and feasibility studies for major transportation systems	New opportunities for development identified	Studies conducted, opportunities identified	Unknown	EDA planning grant and local match (for EDD portion)	2013 - 2015

Goal 3						
Expand the capabilities of a skilled, highly educated, permanent, and full time workforce for local businesses						
Objective	Lead organization and implementation plan	Expected results	Performance measures and evaluation indicators	Number of expected jobs created	Potential Funding Sources	Schedule
Continue developing Gallatin College programs	Gallatin College	Workers will be trained in relevant skills for local jobs	Programs established, students enrolled and graduated	Unknown	EDA planning grant and local match (for EDD portion); Montana State University	2013 - 2018
Leverage applicable state and local workforce investment and development strategies	JobService and NRM EDD will expand opportunities for the Incumbent Worker Training Grant Program and On-the-Job Training program Gallatin College will develop professional certificates to increase skill development	Existing businesses and workforce training groups will access funds to train employees	Number of clients going through IWT and OTJ programs	Unknown	EDA planning grant and local match (for EDD portion); Local JobService; Montana State University	2013 - 2018
Identify relevant workforce development needs through annual business survey	NRM EDD will administer annual business survey Gallatin College will conduct a regional workforce needs	New businesses workforce needs will be identified; programs will respond	Survey conducted	Unknown	EDA planning grant and local match (for EDD portion); Montana State University	2013 - 2018

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	assessment every three to four years					
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Goal 4						
Serve as a District-wide forum for coordinating economic development discussion and initiatives						
Objective	Lead organization and implementation plan	Expected results	Performance measures and evaluation indicators	Number of expected jobs created	Potential Funding Sources	Schedule
Efficiently expand the District's work into all outlying communities	NRM EDD will create several satellite teams in the outlying communities of the District to support ED activities	Efficient use of District resources to provide support network throughout the District	Creation of satellite teams, number of clients served in outlying communities	Unknown	EDA planning grant and local match	2013 - 2018
Hold regular forums with other partners to discuss ED opportunities in the District	NRM EDD, city and county partners, Prospera – forums held to discuss economic development opportunities throughout the District	Opportunities for economic development identified, public perception of economic development improved	Forums held, development opportunities identified	Unknown	EDA planning grant and local match; funding from local partners on as-needed basis	2013 - 2018
Increase the capacity of local governments and county-based development groups to plan for desired futures, and improve the level of communications and cooperation among and between them.	NRM EDD will work closely with local government partners to identify and support local business development opportunities	New opportunities identified, relationships strengthened, capacity strengthened	Opportunities identified, partnerships developed	Unknown	EDA planning grant and local match; funding from local partners on as-needed basis	2013 - 2018

Goal 5						
Promote the use of technology to advance economic development activities						
Objective	Lead organization and	Expected results	Performance measures and	Number of expected	Potential Funding	Schedule

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	implementation plan		evaluation indicators	jobs created	Sources	
Increase connectivity and broadband opportunities	NRM EDD and local partners - explore possibilities of alternative funding sources for broadband expansion	Broadband Steering Committee formed, connectivity strengthened across the District	Broadband Steering Committee formed and active; Number of users connected, connections strengthened	Unknown	EDA planning grant and local match; Montana State University; City of Bozeman; local business partners	2013 - 2016
Measure and evaluate economic impacts	NRM EDD will use IMPLAN software and data to conduct economic impacts for clients around the District	Impacts understood, opportunities identified	Number of studies conducted	Unknown	EDA planning grant and local match	2013 - 2018

Goal 6	Build on our unique natural assets to develop and enhance our tourist industries					
Objective	Lead organization and implementation plan	Expected results	Performance measures and evaluation indicators	Number of expected jobs created	Potential Funding Sources	Schedule
Assist startup, expansion, and retention of viable tourism operations in gateway communities across the District through various economic development tools and services	NRM EDD will work with local partners and select clients to identify and assist in the introduction of new types of tourism in gateway communities across the District	New sources of tourist-based income and job benefits will be identified	Number of tourism operations helped, jobs created	Unknown	EDA planning grant and local match	2013 - 2018

Goal 7	Maintain and enhance the District's physical infrastructure (To be completed according to local government)
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budgeting processes and capital improvements planning allows)						
Objective	Lead organization and implementation plan	Expected results	Performance measures and evaluation indicators	Number of expected jobs created	Potential Funding Sources	Schedule
Bogart pool repairs	City of Bozeman	Park improvements	New pool constructed	Unknown	City of Bozeman and various state and federal sources to be determined	2013
City hall site improvements	City of Bozeman	Municipal services improvements	City hall improvements completed	0.9	City of Bozeman and various state and federal sources to be determined	To be determined
Police and municipal court facility	City of Bozeman, Gallatin County	Municipal and county services improvement	Police and municipal court facilities improved	10.3	City of Bozeman and various state and federal sources to be determined	2013-2016
Energy upgrades to Bozeman city buildings	City of Bozeman	Municipal services improvements	Energy upgrades completed	0.6	City of Bozeman and various state and federal sources to be determined	2013 - 2018
Shops facility expansion plan	City of Bozeman	Municipal services improvements	Shops facility expansion plan completed, improvements completed	0.2	City of Bozeman and various federal sources to be determined	2015 - 2016
Community recreation/aquatics center	City of Bozeman	Park improvements	New community recreation and aquatics center constructed	420	City of Bozeman and various state and federal sources to be determined	To be determined
Bike path improvements	City of Bozeman	Park improvements	New bike paths built and existing paths improved	Unknown	City of Bozeman and various state and federal sources to be determined	2013 - 2018
Water pipe replacement	City of Bozeman	Water system improvements	Critical water infrastructure replaced and upgraded	Unknown	City of Bozeman and various state and federal sources to be determined	2013 - 2018
Water supply planning and	City of Bozeman	Water system improvements	Critical water infrastructure	Unknown	City of Bozeman and	To be determined

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infrastructure			replaced and upgraded		various state and federal sources to be determined	
Annual wastewater systems upgrades	City of Bozeman	Wastewater system improvements	Critical wastewater infrastructure replaced and upgraded	Unknown	City of Bozeman and various state and federal sources to be determined	2013 - 2018
Street upgrades and intersection controls	City of Bozeman	Transportation infrastructure improvements	Street infrastructure upgraded	Unknown	City of Bozeman and various state and federal sources to be determined	To be determined
Construction of Fire Station #4	City of Bozeman	Municipal services improvements	New fire station constructed	Unknown	City of Bozeman and various state and federal sources to be determined	To be determined
Development of Armory building	Private development entities, City of Bozeman	Downtown improvements , tourist opportunities	Armory building converted to destination hotel for downtown Bozeman	Unknown	Private development entities	To be determined
Upgrades to Guenther Building	Gallatin County	County services improvements	Guenther building upgraded	6	Gallatin County and various state and federal sources to be determined	2013
Trail on north side of Fairgrounds	Gallatin County.	Fairgrounds improvements	New trail constructed	1.6	Gallatin County and various state and federal sources to be determined	2013 – 2014
New indoor arena and civic center at Fairgrounds	Gallatin County	Fairgrounds improvements	New indoor arena and civic center constructed at the fairgrounds	30	Gallatin County and various state and federal sources to be determined	To be determined
New Emergency Services building	Gallatin County	County services improvements	New emergency services building constructed	8	Gallatin County and various state and federal sources to be determined	To be determined
New parking area at Fairgrounds	Gallatin County	Fairgrounds improvements	New parking area constructed	1.2	Gallatin County and various state	To be determined

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					and federal sources to be determined	
Year round ice skating facility	Gallatin County	Fairgrounds improvements	New ice skating facility constructed	90	Gallatin County and various state and federal sources to be determined	To be determined
Completion of Exhibit Building remodel at Fairgrounds	Gallatin County		Exhibit building remodel completed	1.1	Gallatin County and various state and federal sources to be determined	To be determined
Remodel of the Midway Facility at Fairgrounds	Gallatin County Fairgrounds improvements	Fairgrounds improvements	Midway Facility remodel completed	1.2	Gallatin County and various state and federal sources to be determined	To be determined
New Sale Pavilion at Fairgrounds	Gallatin County	Fairgrounds improvements	New sale pavilion completed	1.2	Gallatin County and various state and federal sources to be determined	To be determined
New Event Center at Fairgrounds	Gallatin County	Fairgrounds improvements	New event center constructed	90	Gallatin County and various state and federal sources to be determined	To be determined
Signage at the Oak and Tamarack entrances to Fairgrounds	Gallatin County	Fairgrounds improvements	New signage completed	1.2	Gallatin County and various state and federal sources to be determined	2013 - 2015
Outdoor lazy river water park at Fairgrounds	Gallatin County	Fairgrounds improvements	Outdoor lazy river and water park constructed	54	Gallatin County and various state and federal sources to be determined	To be determined
Outdoor events center and climbing tour at Fairgrounds	Gallatin County	Fairgrounds improvements	Outdoor events center and climbing tour completed	50	Gallatin County and various state and federal sources to be determined	To be determined
New concourse building at Fairgrounds	Gallatin County	Fairgrounds improvements	New concourse building constructed	100	Gallatin County and various state and federal	To be determined

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					sources to be determined	
Model Train building at Fairgrounds	Gallatin County	Fairgrounds improvements	Model train building constructed	3	Gallatin County and various state and federal sources to be determined	To be determined
Remodel to Pioneer Museum	Gallatin County	Pioneer museum improvements	Pioneer Museum remodel completed	3	Gallatin County and various state and federal sources to be determined	2013 - 2016
Indoor swim center at Fairgrounds	Gallatin County	Fairgrounds improvements	Indoor swim center completed	143	Gallatin County and various state and federal sources to be determined	To be determined
New justice system (court) building	Gallatin County	County services improvements	New court building constructed	800	Gallatin County and various state and federal sources to be determined	2013 - 2018
I-90 Interchange	Gallatin County	Transportation improvements	Interchange constructed	Unknown	Gallatin County and various state and federal sources to be determined	2013 - 2015
Sewer system improvements in Amsterdam/Churchill	Gallatin County/Churchill Sewer District	Sewer system Infrastructure improvements	Sewer system improved	Unkown	Gallatin County and various state and federal sources to be determined	2014 - 2017
Sewer/water system improvements in Gallatin Gateway	Gallatin County/Gallatin Gateway Sewer District	Water and sewer infrastructure improvements	Water and sewer system constructed	Unkown	Gallatin County and various state and federal sources to be determined	2013 - 2015
Trail and sidewalk construction and improvements, Amsterdam/Churchill	Gallatin County/Amsterdam and Churchill Community Planning Group	Transportation infrastructure improvements	New sidewalk completed	Unkown	Gallatin County and various state and federal sources to be determined	2013
Water and Sewer District improvements, Four Corners	Gallatin County/Four Corners Water and Sewer District	Water and sewer infrastructure improvements	Water and sewer infrastructure improved and constructed	Unknown	Gallatin County and various state and federal sources to be	2013 - 2018

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					determined	
Trail and sidewalk construction and improvements, Four Corners	Gallatin County/Monforton School	Transportation infrastructure improvements	New sidewalk and trails completed	Unknown	Gallatin County and various state and federal sources to be determined	2013 - 2018
Water and Sewer System improvements	City of Belgrade	Water and sewer infrastructure improvements	Water and sewer system upgrades completed	Unknown	City of Belgrade and various state and federal sources to be determined	2013 - 2018
Expand/construct health care facility	Town of West Yellowstone	Local/regional capital improvement	New healthcare facility constructed	Unknown	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Construction of sewage disposal facility at the sewer lagoon in West Yellowstone	Town of West Yellowstone	Sewage infrastructure improvements	Sewer disposal facility constructed	0.6	Town of West Yellowstone, Enterprise Fund	2013 - 2013
Sewer lagoon monitoring wells/groundwater study in West Yellowstone	Town of West Yellowstone	Sewage infrastructure improvements	Monitoring wells in place, groundwater study conducted	1.9	Town of West Yellowstone, Enterprise Fund	2013 - 2014
Construction of additional IP beds at sewer lagoon in West Yellowstone	Town of West Yellowstone	Sewage infrastructure improvements	Additional IP beds constructed	0.8	Town of West Yellowstone, Enterprise Fund	2013 - 2014
Capture additional spring flow at Whiskey Springs	Town of West Yellowstone	water infrastructure improvements	Additional spring flow for drinking water purposes captured	3.8	Town of West Yellowstone, Enterprise Fund	2013 - 2014
Build additional water storage tank	Town of West Yellowstone	Water infrastructure improvements	Additional water storage tank constructed	20	Town of West Yellowstone, Enterprise Fund	To be determined
Remove unused Madison Addition water tank	Town of West Yellowstone	Water infrastructure improvements	Unused water tank removed	0.3	Town of West Yellowstone, Enterprise Fund	To be determined
Replace curb stop valves across town	Town of West Yellowstone	Transportation infrastructure improvements	Curbstop valves replaced	2.5	Town of West Yellowstone, Enterprise Fund	To be determined
Pave the Povah Center parking	Town of West Yellowstone	Transportation	Parking lot paved	1.3	Town of West Yellowstone	2012 - 2013

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lot		infrastructure improvements			resort tax and community public facility fund	
Install 500 feet of curb on either side of Electric Street near the Madison Apartments	Town of West Yellowstone	Transportation infrastructure improvements	New curb installed	0.4	Town of West Yellowstone resort tax, CIP fund, and gas tax	2012 - 2013
Pave the Town's Parkway	Town of West Yellowstone	Transportation infrastructure improvements	Parkway paving completed	21	Town of West Yellowstone InterCap loan w/ down payment	2013 - 2014
Improve interior parks' drainage system	Town of West Yellowstone	Transportation infrastructure improvements	Park drainage system improved	0.6	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	2013 - 2018
Replace dining lodge roof over the kitchen, court, and social services at Union Pacific building	Town of West Yellowstone	Municipal services improvements	Upgrades to Union Pacific building completed	2.5	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Replace electrical system at the museum in the Union Pacific building	Town of West Yellowstone	Municipal services improvements	Electrical system replaced	2	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Construct a Town Hall	Town of West Yellowstone	Municipal services improvements	Town Hall constructed	24	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Construct a pavilion in Pioneer Park	Town of West Yellowstone	Municipal services improvements	Pavilion constructed	2	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined

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Construct a skateboard park	Town of West Yellowstone	Recreation infrastructure improvements	Skateboard park constructed	1.7	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	2013 - 2015
Construct an ice-skating rink	Town of West Yellowstone	Recreation infrastructure improvements	Ice skating rink constructed	Unknown	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Acquire 80 acres of USFS land to the south and west of the Town	Town of West Yellowstone	Acquire land for annexation to Town	80 acres aquired and annexed and prepared for development	Unknown	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Construct work force housing	Town of West Yellowstone	Affordable housing	Workforce housing constructed	Unknown	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Relocate public services shops	Town of West Yellowstone	Municipal services improvements	Shops relocated	Unknown	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Construct event center/fairgrounds	Town of West Yellowstone	Fairgrounds improvements	Event center/fairgrounds constructed	Unknown	Town of West Yellowstone, Gallatin County, and various state and federal sources to be determined	To be determined
Improvements to Manhattan Road South, including upgrades to the railroad crossing	Town of Manhattan	Transportation infrastructure improvements	Manhattan Road south improved	6	Town of Manhattan, Gallatin County, and various state and federal sources to be	To be determined

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					determined	
I-90 interchange modification and frontage road improvements	Town of Manhattan	Transportation infrastructure improvements	Road improvements completed	70	Town of Manhattan, Gallatin County, and various state and federal sources to be determined	To be determined
Eight traffic signals throughout the Town	Town of Manhattan	Transportation infrastructure improvements	Traffic infrastructure completed	26	Town of Manhattan, Gallatin County, and various state and federal sources to be determined	To be determined
Modifications at School Facility	Town of Manhattan	Transportation infrastructure improvements	School facility modifications completed	2	Town of Manhattan, Gallatin County, and various state and federal sources to be determined	To be determined
Traffic signing and striping	Town of Manhattan	Transportation infrastructure improvements	Street infrastructure upgrades completed	12	Town of Manhattan, Gallatin County, and various state and federal sources to be determined	To be determined
Downtown streetscaping	Town of Manhattan	Transportation infrastructure improvements	Downtown streetscaping completed	24	Town of Manhattan, Gallatin County, and various state and federal sources to be determined	To be determined
Upgrade and extension to existing trail system	Town of Manhattan	Transportation infrastructure improvements	Existing trail system upgraded	20	Town of Manhattan, Gallatin County, and various state and federal sources to be determined	To be determined
Upgrades to Big Sky water system	Gallatin County	Water and Sewer infrastructure improvements	Water system upgraded	52	Gallatin County and various state and federal sources to be determined	To be determined

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Upgrades to Big Sky Fire Department facilities and additional apparatus	Gallatin County	Public service improvements	Fire department facilities upgraded and additional apparatus purchased	28	Gallatin County and various state and federal sources to be determined	To be determined
New water supply well	City of Belgrade	Water infrastructure improvements	New water supply well drilled and functional	13.9	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
South water tank	City of Belgrade	Water infrastructure improvements	Water tank constructed	32	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Water line capacity expansion	City of Belgrade	Water infrastructure improvements	Water line capacity expanded	2	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Incremental expansion of city parks	City of Belgrade	Park improvements	New parks built and existing parks improved	Unknown	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Jackrabbit gravity line (Belgrade sewer)	City of Belgrade	Sewer infrastructure improvements	Sewer infrastructure improved	11	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Belgrade sewer lift station	City of Belgrade	Sewer infrastructure improvements	Sewer infrastructure improved	6	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Belgrade sewer	City of Belgrade	Sewer	Sewer	10.5	City of	To be

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system – force main lift to lagoon		infrastructure improvements	infrastructure improved		Belgrade, Gallatin County, and various state and federal sources to be determined	determined
Sewer line capacity expansion	City of Belgrade	Sewer infrastructure improvements	Sewer line capacity expanded	1	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
N. Pacific Ave extension	City of Belgrade	Transportation infrastructure improvements	Road improvements completed	13	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
East Main Street expansion	City of Belgrade	Transportation infrastructure improvements	Road improvements completed	49.5	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
West Main Street lane expansion	City of Belgrade	Transportation infrastructure improvements	Road improvements completed	26.4	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Madison/Broadway street lane expansion	City of Belgrade	Transportation infrastructure improvements	Road improvements completed	13.2	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Jackrabbit Lane expansion	City of Belgrade	Transportation infrastructure improvements	Road improvements completed	59.4	City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined

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Cruiser Street extension	City of Belgrade	Transportation infrastructure improvements	Road improvements completed	23.1	City of Belgrade, Gallatin County, and various state and federal resources to be determined	To be determined
Construction of new fire station	Central Valley Fire Department	Public service improvements	New fire station built	Unknown	Central Valley Fire Department, City of Belgrade, Gallatin County, and various state and federal sources to be determined	To be determined
Rescue Center	City of Livingston	Public service improvements	New rescue center built	Unknown	City of Livingston, Park County, and various state and federal sources to be determined	To be determined
Water System Improvements	Town of Three Forks	Water infrastructure improvements	Water infrastructure improved	Unknown	Town of Three Forks, Gallatin County, and various state and federal sources to be determined	To be determined
Wastewater Treatment Improvements	Town of Three Forks	Sewer infrastructure improvements	Wastewater infrastructure improved	Unknown	Town of Three Forks, Gallatin County, and various state and federal sources to be determined	To be determined
Wastewater Collection System Improvements	Town of Three Forks	Sewer infrastructure improvements	Wastewater infrastructure improved	Unknown	Town of Three Forks, Gallatin County, and various state and federal sources to be determined	To be determined
Livingston city-wide Parks Master Plan and improvements	City of Livingston	Parks improvements	New parks master plan completed, improvements identified	143	City of Livingston, Park County, and various state and federal	To be determined

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					sources to be determined	
City Commission chambers Improvements	City of Livingston	Public service improvements	New City Commission chambers upgraded	0.4	City of Livingston, Park County, and various state and federal sources to be determined	2016 - 2017
Radio sites construction – 911 services	City of Livingston	Emergency services improvements	New radio sites constructed, 911 service upgraded	8	City of Livingston, Park County, and various state and federal sources to be determined	2013 - 2015
B Street from Park to Geysers Street	City of Livingston	Transportation Improvements	Street improvements completed	2.4	City of Livingston, Park County, and various state and federal sources to be determined	2013 - 2015
North Main Street from Callendar to Reservoir Street	City of Livingston	Transportation Improvements	Street improvements completed	1.8	City of Livingston, Park County, and various state and federal sources to be determined	2013 - 2015
Alleys between Main Street and B Street from Callendar to Lewis St	City of Livingston	Transportation Improvements	Street improvements completed	0.8	City of Livingston, Park County, and various state and federal sources	2013 - 2015
100 and 200 block of South Main Street, 100 and 400 blocks of East Lewis Street, and the 100 blocks of South E and F Streets	City of Livingston	Water main Improvements	Street improvements completed	2.4	City of Livingston, Park County, and various state and federal sources to be determined	2013 - 2015
6 Blocks of Alleys Downtown from Callender Street to Geysers Street between	City of Livingston	Water main improvements	Street improvements completed	0.4	City of Livingston, Park County, and various state and	2013 - 2015

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Main Street & 3rd Street					federal sources to be determined	
Railroad underpass	City of Livingston	Transportation Improvements	Street improvements completed	172	City of Livingston, Park County, and various state and federal sources to be determined	To be determined
Sewer plant rehabilitation	City of Livingston	Sewer system improvements	Wastewater systems upgraded	52	City of Livingston, Park County, and various state and federal sources to be determined	2013 - 2018
Modernized entry to Yellowstone National Park	Park County, Yellowstone National Park, NRM EDD	Modernized entry experience to Yellowstone National Park at Gardner entrance	New entryway constructed		Park County, Yellowstone National Park, and state and federal resources to be determined	2013 - 2018
Gardner storm drain and street upgrades	Park County	Improved storm drain infrastructure	Storm drain and street infrastructure upgraded		Park County and state and federal resources to be determined	To be determined
Logan landfill expansion	Gallatin County	Improved sanitation service	Landfill expanded	Unknown	Gallatin County and state and federal resources to be determined	To be determined
Logan water and sewer	Gallatin County	Water and sewer system improvements	New water and sewer infrastructure completed	Unknown	Gallatin County and state and federal resources to be determined	To be determined
Wilsall senior facilities	Park County	Improved senior services	Senior facilities constructed	Unknown	Gallatin County and state and federal resources to be determined	To be determined
Belgrade senior	Belgrade, Gallatin	Improved	Existing senior	Unknown	Gallatin	To be

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center	County	senior services	center upgraded		County and state and federal resources to be determined	determined
Cooke city water and sewer	Park County	Water and sewer system improvements	Water and sewer systems constructed and upgraded	Unknown	Gallatin County and state and federal resources to be determined	To be determined
Three Forks multimodal	City of Three Forks	Transportation improvements	New trails and sidewalks constructed	Unknown	Gallatin County and state and federal resources to be determined	To be determined
West Yellowstone Science Center	Town of West Yellowstone	Improved visitor experience	New Science Center constructed	Unknown	Gallatin County and state and federal resources to be determined	To be determined
IT Redundant Backup solution with offsite location for servers	Park County, City of Livingston	Improved IT services for Park County	New IT infrastructure implemented	Unknown	Gallatin County and state and federal resources to be determined	To be determined
IT virtualization	Park County, City of Livingston		New IT infrastructure implemented	Unknown	Park County, City of Livingston, and state and federal resources to be determined	To be determined
GIS Parcel Data 10 year project enhancement Program	Park County, City of Livingston, Bureau of Land Management	Improved survey data	New GIS parcel data project completed	Unknown	Park County, City of Livingston, and state and federal resources to be determined	To be determined
Culvert and Bridge Data Collection	Park County, City of Livingston	Improved survey data	Data collected on culvert and bridge needs	Unknown	Park County, City of Livingston, and state and federal	To be determined

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					resources to be determined	
All Hazard Website Project	Park County, City of Livingston	Improved emergency services	New hazard website launched	Unknown	Park County, City of Livingston, and state and federal resources to be determined	To be determined
Contracted City Utilities Mapping Project	Park County, City of Livingston	Improved GIS data for utility infrastructure	Utilities mapped, GIS layers created	Unknown	Park County, City of Livingston, and state and federal resources to be determined	To be determined
Routable Road network Project for 911 mapping solution	Park County, City of Livingston	Improved emergency services	Network project completed	Unknown	Park County, City of Livingston, and state and federal resources to be determined	To be determined
Comprehensive online mapping services	Park County, City of Livingston	Improved public services	Online mapping services available to the public	Unknown	Park County, City of Livingston, and state and federal resources to be determined	To be determined

Chapter 5: Plan Evaluation

The NRMEDD is a relatively new District. It manages a small but growing number of programs. Our policy is to assure compliance with the rules and regulations that govern these programs and performance is continually evaluated by EDA including the applicable fiduciary and performance responsibilities of its programs.

The District's performance is also evaluated on an ongoing basis by our Board of Directors and Committees as facilitated via staff communications relating to current and future projects. Program updates occur through Board of Director meetings, personal contacts, meetings of member entities, Annual Report and the CEDS.

The District is also keenly aware that its actions and production must be measureable. Measurement tools include but are not limited to, performance and financial audits, regularly scheduled reporting obligations and frequent communication with the respective agencies. Additionally, performance will be evaluated on the basis of success of the priority projects described in Chapter 4.

Most recently the NRMEDD has introduced the concept of IMPLAN- based impact assessments which are used to measure program effectiveness. IMPLAN tools enable the district to specifically measure the economic contribution of investments including gross economic output, employment dollars, jobs and taxes generated. The District has contracted to access the IMPLAN datasets for Gallatin and Park Counties.

The District is currently tracking its program outputs with these analytical tools and will provide detailed analysis in 2013 as a measure of its performance.

PERFORMANCE MEASUREMENTS

1. IMPLAN-based economic analysis of economic development programs initiated and implemented by the District.
2. The number of businesses that participate in our retention, expansion and recruitment programs.
3. The number of jobs directly and indirectly retained, attracted or attributable to District programs.
4. The level at which we comply with our Technical Assistance grant award and administrative conditions.
5. The number of jobs created after the implementation of our CEDS.
6. The level and frequency to which District staff interacts with communities within the region to provide assistance toward mitigating identified infrastructure deficiencies.
7. The level and frequency of participation by government, business, and community leaders in projects.
8. The amount of private sector investment in the region after implementation of the CEDS
9. Changes in the Economic Environment of the Region

Appendix A: Resource Documentation & Bibliography

Resource	Summary
Belgrade, City of, <i>Impact Fees</i> , 62 pgs, TischlerBise 2007. http://www.ci.belgrade.mt.us/Belgrade_Fees_2-14-07.pdf .	Draft report on one-time payments used to fund growth-related system improvements. This report documents the specific factors used to derive the impact fees. Impact fee methodologies also identify the extent to which newly developed properties are entitled to various types of credits to avoid potential double payment of capital costs.
Livingston, City of, <i>Capital Improvement Plan</i> , 2012-2016, 183 pgs. http://www.livingstonmontana.org/living/docs/Final_CIP.pdf .	Fully-funded five-year Capital Improvement Plan (CIP) for the City of Livingston. This CIP is operational in nature. The intention of this CIP is to provide a “blueprint” of the city’s capital spending for the next five years. This CIP includes a 5-year historical financial analysis as well as a 5-year financial forecast for all funds which have capital expenditure implications.
Livingston, City of, <i>Capital Improvement Plan Budget</i> . 2012. http://216.98.130.27/revize/cityoflivingston/living/capital_improvement_plan.html .	Financial analysis and financial projections enabled the capital needs of the city to be reconciled with the city’s financial capabilities.
Gallatin County Capital Projects Worksheet, 1 pg	

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Gallatin Canyon and Big Sky, *Capital Improvement Plan*. 74 pgs, TischlerBise 2011.

http://www.gallatin.mt.gov/public_documents/gallatincomt_plan_dept/TO_BE_DELETED/uploadedpdfs/Big%20Sky%20CIP%2012.28.11.pdf.

The CIP quantifies the projected demand for water, sewer, fire, police, schools, transportation and affordable housing in Big Sky over the next ten years. The CIP includes current estimates and future projections of residential and nonresidential development in Big Sky. Given the recent economic recession and slow recovery combined with an existing surplus of vacant housing, TischlerBise utilized conservative projections of future development. Current levels-of-service (LOS) have been quantified and have been compared to desired LOS, where applicable. To the extent possible, capital cost assumptions and projections have been included.

Manhattan, Town of, *Transportation Plan*. WGM Group, Inc. 2006.

<http://www.townofmanhattan.com/index.php/transportation-plan/doc/3/raw>.

The Transportation Plan supplements the Growth Policy with technical analysis and planning for transportation improvements. The Town intends to create an integrated system of streets, bike lanes, pedestrian paths, and gravel trails to offer residents a variety of safe and appropriate travel routes in and around the community.

West Yellowstone, Town of, *Capital Improvement Policy*, September 2011, 23 pgs.

<http://www.townofwestyellowstone.com/downloads/Capital-Improvement-Plan-8.17.10.pdf>.

The 2011 - 2015 CIP details the Town's long term plans for capital outlays and capital projects that are necessary in order to maintain ongoing operations or improve efficiency. Capital outlays include operating equipment which will last longer than three years and have an initial cost per item of at least \$5,000 and an estimated service life of at least 10 years.

Opportunities Ahead: 2011 Analysis of Workforce Needs. Montana State University & Gallatin College Programs. 2011. 39 pgs.

<http://bloximages.chicago2.vip.townnews.com/bozemandailychronicle.com/content/tncms/assets/v3/editorial/c/08/c08fe76a-4dfa-11e1-ac5a-001871e3ce6c/4f2b24bc8ff99.pdf.pdf>.

This research report to Gallatin College summarizes findings from an evaluation of employer, student, and area business trends to assist the college in determining the most useful degree programs to add as the college continues to grow. Three primary methods were used in the

Northern Rocky Mountain Economic Development District

study including area employers, traditional and non-traditional students, and area employment data and trends.

Montana Veterans in the Workforce 2011, 4 pgs.
<http://wsd.dli.mt.gov/veterans/vetemployment.asp>.

Unable to locate report for summary.

Gallatin County, *Comprehensive Economic Development Strategy*. 2005, 69 pgs.
http://s3.amazonaws.com/zanran_storage/www.bozeman.org/ContentPages/43784068.pdf.

Comprehensive Economic Development Strategy (CEDS) document is designed as a planning and implementation tool for the communities in Gallatin County. This document will be instrumental in evaluating the success of the CEDS process. The goal of the CEDS is to guide and coordinate efforts of various public and private entities in economic development.

Park County, *Comprehensive Economic Development Strategy*. 2002, 108 pgs.
<http://www.parkcounty.org/departments/ECONOMICDEV/RLF/ceds%202002.pdf>.

Comprehensive Economic Development Strategy (CEDS) document is designed as a planning and implementation tool for the communities in Park County. This document will be instrumental in evaluating the success of the CEDS process. The goal of the CEDS is to guide and coordinate efforts of various public and private entities in economic development.

Bozeman, City of, *Affordable Housing Action Plan*. Werwath Associates. 2012 – 2016. 22 pgs.
<http://www.bozeman.net/Smarty/files/51/51940e46-3a7e-475a-832d-07ab0fda607a.pdf>.

This affordable housing action plan endorses four major strategies to be carried out over the next five years including; (1) increase and preserve the supply of affordable housing, (2) consider amendments to City regulations, (3) assure financial and organizational capacity, and (4) share crucial market data and report on progress.

Bozeman, City of, *Economic Development Plan*. 2009, 145 pgs.
<http://www.bozeman.net/Smarty/files/f2/f2217bae-9beb-4068->

This Plan will provide guidance to the City Commission, City staff, and the community regarding economic and business development

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[8209-7b649b328453.pdf](#).

issues in Bozeman.

Gallatin County, *Growth Policy*, 2003, 68 pgs.

http://www.gallatin.mt.gov/public_documents/gallatincomt_plan_dept/Plans&Policies/GrowthPolicyComplete05.pdf.

The Growth Policy's principal purpose is to provide general direction for decisions relating to land use, such as zoning and subdivisions.

Park County, *Growth Policy*, 2006. 286 pgs.

http://www.parkcounty.org/departments/COMMUNITYDEVELOPMENT/Divisions/Planning/FullGrowthPolicy_8-4-06.pdf.

The Growth Policy's principal purpose is to provide general direction for decisions relating to land use, such as zoning and subdivisions.

Bureau of Business and Economic Research,

Montana Business Quarterly, Vol., 50, No. 2, Spring 2012. <http://www.bber.umt.edu/mbq/default.asp>.

Montana Business Quarterly has provided accessible and reliable information about Montana's business and economic climate. Quarterly articles include groundbreaking and sometimes controversial Bureau research, state and local economic analyses and forecasts, up-to-date information about Montana's major industries, and business reports and profiles.

United States Bureau of Labor & Statistics, *Montana Economy at a Glance*, 2012 5 pgs.

<http://www.bls.gov/eag/eag.mt.htm>.

The Bureau of Labor Statistics (BLS) produces *Economy at a Glance* pages at the national, regional, state, and metropolitan area levels. The data displayed in these pages are assembled from different surveys and programs conducted by BLS. The *Economy at a Glance* pages are refreshed with current data every time any of the source programs releases new statistics.

Montana Department of Labor & statistics,

Montana's Mass Layoff Statistics 2011 Annual Report. April 2012. 16 pgs.

http://www.ourfactsyourfuture.org/admin/uploadedPublications/4347_MLS-10.pdf.

The Mass Layoff Statistics (MLS) program is a Federal-State cooperative program operated by the Montana Department of Labor and Industry and the U.S. Bureau of Labor Statistics (BLS). The MLS program tracks layoffs that result in at least 50 unemployed individuals. The state agencies are tasked to track state level Unemployment

Insurance (UI) data for possible mass layoff events and to perform the required interview process.

Salverson, David & Henry Renski, Center for Urban & Regional Studies, University of North Carolina, *The Importance of Quality of Life in Location Decisions*. 2003. 41 pgs.

<http://curs.unc.edu/curs-pdf-downloads/recentlyreleased/neweconomyreport.pdf>.

Executive Summary, "Traditionally, the location decisions of firms have been driven primarily by factors such as land costs, labor costs and access to materials and markets. Today, however, quality of life for employees is becoming an important factor as well, particularly for knowledge-based industries such as telecommunications, computers, entertainment, and biotechnology that are part of the so-called New Economy. In the New Economy, knowledge, rather than natural resources, is the raw material of business."

Gallatin County Hazard Mitigation Plan 2012, 190 pgs.

http://www.readygallatin.com/docs/local_plans/Gallatin%20County%20Mitigation%20Plan%20120710.pdf.

Gallatin County, the cities of Bozeman, Belgrade, and Three Forks and the town of West Yellowstone, Montana are taking the steps necessary to become disaster resistant communities. Through their initiative, they have developed this plan jointly to meet the requirements of the Interim Final Rule published in the Federal Register on February 26, 2002 at 44 CFR Part 201 as part of the Disaster Mitigation Act of 2000.

Park County Hazard Mitigation Program.

<http://www.parkcounty.org/Departments/DES/PDFs/PDM%2011%20-%20Redacted.pdf>.

Purpose of Plan is three fold; mitigate the effect of hazards through education, ordinances, resolutions, and clear definition and implementation of mitigation projects to enhance life-safety and reduce the loss of property of residents and visitors to Park County, Coordinate mitigation activities with all entities of Park County to assess the hazards and take various actions to reduce or eliminate the risk factors of those hazards, reduce the local economic impact

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- caused by the effects of hazards in the communities.
- Montana State University, Draft Strategy Plan, 15 pgs, 2012. <http://www.montana.edu/opa/coms/councils/pcouncil/spc/draftstratplan/index.php>.
- Montana State University, *Economic Impact Report*, 2010, 36 pgs. <http://www.montana.edu/cpa/news/images/articles/hires/img201012231293135334.pdf>.
- Montana State University, *Montana State University Five Year Vision, FY 08 to FY 13*. May 2008. <http://www.montana.edu/vision/prioryears/fy08/VisionDocfy08-fy13.pdf>.
- Leidner, Stuart, Prospera Business Network, 2011 *Economic Profile of Gallatin & park Counties, Montana*. 2011. 62 pgs. <https://www.prosperabusinessnetwork.org/>.
- Headwaters Economics, *NRMEDD: A Profile of Socioeconomic Measures*. Economic Profile System-Human Dimensions Toolkit. August 10, 2012. <http://headwaterseconomics.org/>.
- The University's strategic plan with goals, objectives and metrics to further the institutions vision and values.
- To quantify the impact of MSU on the state's economy, an economic impact study was conducted by the University of Montana's Bureau of Business and Economic Research. The premise of the study was to compare the actual economy with a hypothetical economy in which the university is removed.
- Montana State University will be the university of choice for those seeking a student-centered learning environment distinguished by innovation and discovery in a Rocky Mountain setting.
- The 2011 Economic Profile of Gallatin and Park Counties* provides a comprehensive description of the regional economy with an emphasis on population demographics, the cost of living, employment, and major industries. In instances where county and regional data is unavailable, the statewide data has been provided.
- Detailed socioeconomic assessment of the Northern Rocky Mountain Economic Development District. Topics include land use, demographics, specific industry sectors, the role of non-labor income, the wild land-urban interface, the role of amenities in economic development, and payments to county

governments from federal lands.

Montana Economic Developers Association.
Belgrade MEDA Resource Team Assessment Report. March 2012. 64 pgs.
<http://www.medamembers.org/Belgrade%20Report.pdf>.

Montana Economic Developers Association (MEDA) provided staff support for the coordination of a resource team to assist Belgrade in evaluating its assets and challenges and in developing suggestions for improving the environment, social and economic future of the area.

Montana Economic Developers Association.
Livingston MEDA Resource Team Assessment Report. March 2012. 51 pgs.
http://www.medamembers.org/Livingston_Report.pdf.

Montana Economic Developers Association (MEDA) provided staff support for the coordination of a resource team to assist Livingston in evaluating its assets and challenges and in developing suggestions for improving the environment, social and economic future of the area.

Gallatin County / City of Bozeman Economic Summit. Public Meeting in the Bozeman City Council Chambers. March 22, 2012. 125 Comments Collected.

Public outreach to increase awareness and outcomes related to economic programs, partnerships, and prosperity in the City of Bozeman and Gallatin County. Objectives were to (1) create a forum to engage community in a deliberative process about present and emerging economic sectors (Technology, Manufacturing, Outdoor Industry, Hospitality / Retail, Tourism, Social Services, Finance, Real Estate, Construction, Professional Services) in the region, (2) define key stakeholders, identify partnerships, mobilize networks, and build strategic alliances, and (3) collect data for Federal Economic Development Agency (EDA) Comprehensive Economic Development Strategy (CEDs) process.

Northern Rocky Mountain Economic Development District. On Line CEDs

Strategic public outreach program to assist in the development in a SWOT analysis for the District.

Comment Form. 2012.

<http://nrmedd.org/ceds/input-form/>.

Outdoor Industry Association. State of the Industry report 2006. 2006. 33 pgs.
<http://www.outdoorindustry.org/images/researchfiles/Soi.pdf?29>.

Comprehensive assessment of the Outdoor industry. Summarizes sectors of industry that are expanding and contracting. The health of the Outdoor Industry can be gauged by two sets of metrics: sales and financials, and participation and passion for the active outdoor lifestyle. The outdoor lifestyle is defined by the wellness, social interaction, and outdoor connection that Americans desire.

Montana Department Of Labor, *2011 Economic Profile Park County*. Research & Analysis Bureau.
<http://www.ourfactsyourfuture.org/cgi/databrowsing/?PAGEID=4&SUBID=150>.

Synopsis of current economic and demographic conditions of the County. Generated Annually by the Montana Department of Industry and Labor.

Montana Department Of Labor, *2011 Economic Profile Gallatin County*. Research & Analysis Bureau.
<http://www.ourfactsyourfuture.org/cgi/databrowsing/?PAGEID=4&SUBID=150>.

Synopsis of current economic and demographic conditions of the County. Generated Annually by the Montana Department of Industry and Labor.

Montana Department of Transportation Aviation Division. Montana 2007-2008 State Aviation Systems Plan – Economics Impacts of Airports Reports. April 2009. 69 pgs.
http://www.mdt.mt.gov/aviation/docs/economic-impact/Tech%20Report_Final.pdf.

This study measured the economic impact of all 121 public use airports in Montana. Seven of these airports are Primary Commercial Service Airports, while eight are Commercial Essential Air Service (EAS) Airports. 106 general aviation airports were also included in the analysis. The general aviation airports were broken down into three categories: High Volume General Aviation, other Select General Aviation, and rural Community Airports.

University of Montana, The, Institute for Tourism & Recreation Research, *The Economic Review of Tourism Montana*. 2010, 63 pgs.

<http://www.itrr.umt.edu/ecorev/EconomicReview2010ITRR.pdf>.

This is the sixth edition of the biennial report, *The Economic Review of the Travel Industry in Montana*. This review provides current and historical data of nonresident travel and tourism in Montana, and offers the industry's economic impacts to the state. In most cases this report provides updated information for 2008 and 2009. In order to provide the most objective data and analysis, only the most impartial sources were used and are noted throughout the report.

Ellard, A.; Nickerson, N. P.; Dvorak, R. *Spiritual Dimension of the Montana Tourism Experience*. Leisure/Loisir 2009 Vol. 33 No. 1 pp. 269-289.

This study explored the deeper meaning of a vacation experience in Montana. In-depth interviews of non-resident vacation visitors were conducted which asked visitors to describe their vacation and what it meant to them. Results revealed a previously unknown spiritual dimension associated with visiting Montana. Forty percent of the visitors portrayed their vacation experience in Montana using terms that connote spiritual meaning.

[B. Bynum Boley](#)¹, [Norma Polovitz Nickerson](#), [Keith Bosak](#), Measuring Geotourism Developing and Testing the Geotraveler Tendency Scale (GTS). Journal of travel Research, **September 2011** vol. 50 no. 5 **567-578**.

<http://jtr.sagepub.com/content/50/5/567.full.pdf+html>.

Geotourism is tourism that sustains or enhances the geographical character of a place, including its environment, culture, aesthetics, heritage, and the well-being of its residents. The purpose of this study was to develop and test a scale measuring geotraveler tendencies (GTS). The GTS consists of 35 items across eight subscales measuring both attitudes and behaviors of travelers.

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Park Co and Livingston, list of IT and GIS projects from Erica Hoffman	Park County IT Department
Ed Meece, City Executive Officer, More Livingston Projects	City of Livingston
Park County Environmental project list from Sanitation engineer.	Park County, Sanitation engineer
Gallatin County Road Projects, Lee Provance, Gallatin County road & Bridge Superintendent. 2012.	Gallatin County, Lee Provance
Community Health Report 2011, 187 pgs	Gallatin City/County Health Department
Community Health Findings Report 57 Slides	Gallatin City/County Health Department

Appendix B: Bozeman CEDS Meeting Summaries

2012 City of Bozeman / Gallatin County Economic Summit

March 22, 2012

OUR GOALS:

Increase awareness and outcomes related to economic programs, partnerships, and prosperity in the City of Bozeman and Gallatin County.

OBJECTIVES:

1. Create a forum to engage community in a deliberative process about present and emerging economic sectors (Technology, Manufacturing, Outdoor Industry, Hospitality / Retail, Tourism, Social Services, Finance, Real Estate, Construction, Professional Services) in the region.
2. Define key stakeholders, identify partnerships, mobilize networks, and build strategic alliances.
3. Collect data for Federal Economic Development Agency (EDA) Comprehensive Economic Development Strategy (CEDS) process.

AGENDA:

10:00 Welcome and Overview

10:15 Panel Discussion #1 responding to the following:

What are your greatest assets within your sector and the community? What is your current situation in terms of opportunities? (Think partnerships, networks and strategic alliances)

10:45 Table Discussion

11:00 Comments / Questions

11:10 Panel Discussion #2 responding to the following:

What barriers / constraints exist within your sector and the community?

11:40 Table Discussion

Noon Comments / Questions

12:15 Lunch served

12:30 Speaker: *Robert Hietala, Dean of Gallatin College Programs*

1:00 Q/A

1:15 Panel Discussion #3 responding to the following:

Envision your sector and the community in 3 months, 3 years, 30 years; What do you want to achieve? What specific actions can we take collectively to promote economic development in short-term / long-term (3 months, 3 years, 30 years)? What are the measurable outcomes?

1:45 Table Discussion

2:15 Comments / Questions

2:25 Summit Summary: Discussion on commitment for next steps

2:30 Adjourn

Presented by City of Bozeman, Gallatin County, the Northern Rocky Mountain Economic Development District and Prospera Business Network; Assistance from the Montana State University Local Government Center. Special Thanks to Clark's Fork for lunch!

Panelists

2012 City of Bozeman / Gallatin County Economic Summit

Panel Discussion #1

What are your greatest assets within your sector and the community? What is your current situation in terms of opportunities? (Think partnerships, networks and strategic alliances)

<i>Name</i>	<i>Organization</i>	<i>Sector</i>
-	-	Technology
Greg Garrigues	Hyalite Outdoor Products	Manufacturing
Carl Solvie	Best Western Grantree	Hospitality/Retail
Cheryl Ridgley	Bozeman Deaconess	Social Services
Jerri Norris	First Security Bank	Finance, Real Estate, Construction, Prof. Services

Panel Discussion #2

What barriers / constraints exist within your sector and the community?

<i>Name</i>	<i>Organization</i>	<i>Sector</i>
Christophe Lambert	Golden Helix	Technology
Becca Ritter	Spark R & D	Manufacturing
Jim Robbins	TBID	Hospitality/Retail
Tim Trazinsky	Gallatin Valley Food Bank	Social Services
Scott Molzhan	GAR & ERA/ Landmark Realty	Finance, Real Estate, Construction, Prof. Services

Panel Discussion #3

Envision your sector and the community in 3 months, 3 years, 30 years; What do you want to achieve? What specific actions can we take collectively to promote economic development in short-term / long-term (3 months, 3 years, 30 years)? What are the measurable outcomes?

<i>Name</i>	<i>Organization</i>	<i>Sector</i>
Nick Zelter	MSU Tech Transfer	Technology
Matt MCune	Autopilot	Manufacturing

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Tom Mazurek
Jeff Rupp
Tony Martel

Holiday Inn
HRDC
Martel Construction

Hospitality/Retail
Social Services
Finance, Real Estate, Construction, Prof. Services

2012 City of Bozeman / Gallatin County Economic Summit Summary

On March 22, 2012, the City of Bozeman and Gallatin County joined with several area development organizations to host an Economic Summit. A re-connect event is scheduled for May 10, 2012, 6:00 pm – 8:00 pm City Commission Meeting Room, Bozeman City Hall to discuss the responses and findings. The following information that summarizes the event findings is provided as a courtesy and in the event you will be unable to attend the May meeting.

An 'At-A-Glance Summary' follows on the next page. For a more detailed review of the input, please see Exhibit 1. The responses listed on Exhibit 1 have been roughly categorized as either describing a 'community asset, or positive factor', or describing a 'constraint or economic barrier'. To help the reader gain perspective, the approximate numbers of responses are posted next to each discussion point. The numbers, however, are at best a guide. There were several imprecise variables in the process including how responses were categorized.

The Goal of the Summit was to increase awareness and outcomes related to economic programs, partnerships, and prosperity in the City of Bozeman and Gallatin County.

The Objectives were to:

4. Create a forum to engage community in a deliberative process about present and emerging economic sectors (Technology, Manufacturing, Outdoor Industry, Hospitality / Retail, Tourism, Social Services, Finance, Real Estate, Construction, Professional Services) in the region.
5. Define key stakeholders, identify partnerships, mobilize networks, and build strategic alliances.
6. Collect data for Federal Economic Development Agency (EDA) Comprehensive Economic Development Strategy (CEDS) process.

AT A GLANCE SUMMARY

The responses to the small group questions exercises reveal a broad level of agreement on both assets and constraints. Overall, the following themes emerged:

Assets and Positive Attributes

Quality of Life. Overwhelmingly, participants noted the high quality of life in Bozeman and the surrounding area. Cultural and natural amenities; clean air and water; recreational activities; the authentic people within the community; and proximity to Yellowstone National Park were all mentioned as contributing to Bozeman's high quality of life.

Quality and Opportunities of Education. Many participants commented on the quality of education in the Bozeman area, specifically the presence of MSU. The quality of the education and higher education system contribute to high quality and educated employees; the attraction and retention of both businesses and employees; and partnerships between MSU and the private sector. The quality of education in Bozeman is a unique asset that contributes to our competitive edge.

Vibrancy of Our Private Sector. Numerous respondents mentioned our vibrant and diversified economy as well as the opportunity for collaboration and partnerships. Bozeman and the Gallatin Valley has a number of mature companies as well as over 100 high-tech companies, all of which contribute to a growing and thriving private sector.

Constraints and Barriers

As participants looked ahead at potential changes, a variety of themes emerged:

General Business Concerns. Residents cited a variety of general concerns, such as the need to take advantage of year-round tourism; the opportunity for film production; higher land prices; and the need for a downtown hotel or conference center.

Government, Fees, and Regulations. Several respondents cited concerns with the state and federal tax structure; impact fees; the disparity between fees and regulations inside versus outside the city limits; and general concerns with the added costs of fees and regulations.

Banking, Finance, and Capital. Many participants noted constraints with financing, specifically access to capital; the lack of financial strength for large projects; the difference in funding rates for different sectors; and challenges with startup and venture capital.

Labor. Participants noted the challenge of creating year-round opportunities for seasonal employment; challenges with the size of the labor force and the general population; and limits with our skilled labor pool.

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Discussion Point	Approximate number of Asset-related Comments	Assets and Positive Attributes	Approximate number of Constraint-related Comments	Constraints and Barriers
Business Support Activities	24	Oranization Support for business growth, chamber, Prospera, SBA, Bozeman Daily Chronicle, BEAR , MMEC, Tech transfer, local decision making ability to make decisions that are best for Bozeman	8	Startup invironment for high tech companies, capacity to serve startup companies
Labor	22	local market provides a stable workforce, quality of workforce is a sales point for community, smart/talented business people, strong professional base, mix of workforce skillset	25	Creating year-round employment opportunities for seasonal employment; size of labor force, population numbers too low to sustain a good economy, limited skilled labor pool, diversity, lack of critical mass.
Banking, Finance and Capital	11	Financial support from lenders for business growth, market diversity, buying power within market, lots of banking options	28	Access to capital, lack of financial strength for very large projects, funding rates different for different sectors, banks do not provide start-up capital, funding for ech companies, venture capital, changing regulations

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Discussion Point	Approximate number of Asset-related Comments	Assets and Positive Attributes	Approximate number of Constraint-related Comments	Constraints and Barriers
Government, Fees and Regulations	22	City/County moving towards 'business favorable' environment, ability of city to promote density, partnership between services and government entities, strong networking between government and private groups, benefits from uniformity of regulations	33	Capital gains tax structure, state sales tax, non-streamlined processes between production regulation, costs to build in city vs county, added cost of construction regulations, impact fees are slowing local growth, regulatory uncertainty, surprises with few avenues for recourse, permitting processes
General Economy and Business Concerns	50	Vibrant economy, diversified, collaboration, partnerships, mature companies, over 100 high-tech companies in Gallatin Valley	33	Need year-round tourism, film production, land prices create lower quality developments, declining federal budgets, need downtown hotel
Education	50	Level of education and higher education, MSU Innovations Center, quality of employees highly educated, Research University, very good educational system, helps us attract and retain high-quality employees, the partnerships with MSU enable the innovative capabilities, MSU as a hub of outreach to	12	Lack of technical skilled persons. Four yr degrees do not provide the hands on training for skilled laborers. Job training and retraining

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		global markets		
Public Facilities	7	good infrastructure air, rail, interstate, internet, library	9	Water, sewer, could use more 3-phase power, shrinking state and fed funding for infrastructure, large amount of mney need to build out to underserved areas.

Discussion Point	Approximate number of Asset-related Comments	Assets and Positive Attributes	Approximate number of Constraint-related Comments	Constraints and Barriers
Internet/Broadband	11	Connected to regional/national economy, high speed internet access, way to engage community	8	Need better and cheaper internet bandwidth, and bandwidth and investors connected with MSU, Internet access is ok but not great
Travel and Air Expenses	8	Access to the world through great air connections, good air services, exceptional for town of this size, strong tourism center, airport improvements are helping	4	High cost of airfare to/from Bozeman, costs hurt tourism and business growth
Event and Convention Center	3	Increase in conventions	12	limited meeting/convention space, need more meeting space, need facility related tourism, need conference center with meeting space for more than small groups

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Transportation	11	Good transportation infrastructure, I-90, airport, bus system, paths and bike facilities	6	Need container service to Montana, not efficient, have to return containers, trains, intermodal freight has not existed in Montana since 2001,
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Discussion Point	Approximate number of Asset-related Comments	Assets and Positive Attributes	Approximate number of Constraint-related Comments	Constraints and Barriers
Housing	4	Housing was listed as an asset by four respondents, increased density as an asset was mentioned	9	Affordable housing, costs to build vs buy existing home, weak housing mkt, affordable housing that is integrated into the community
Quality of Life	112	Cultural amenities, natural amenities, clean air, clean water, fishing, hunting, hiking, biking trails, abundance of activities, natural beauty, good people authentic community, Yellowstone Park	9	People have less \$\$ for leisure activities, more trails, performing arts center, outdoor and indoor performing arts venues, captial for cultural aspects
Health Care	9	Quality medical care, individual businesses recognize the importance of healthcare philanthropy	10	healthcare uncertainty, general awareness of hospital non-profit status, confusion created by national healthcare agenda, healthcare is

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				unaffordable for a 1-3 person shop, providing healthcare for small companies.
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Appendix C: SWOT Survey/Input Form

You are being asked to report your opinion on topics that are important to the local economy. You may not have an answer for each space provided, that is ok. To help structure responses we are using a typical SWOT analysis (strengths, weaknesses, opportunities and threats). Please consider the following as you prepare your responses:

INDUSTRY SECTOR _____ Name of Respondent _____

Phone/Email _____

FROM LIST

Strengths: Please list the competitive advantages, assets or strengths of this sector.

Weaknesses: Please describe disadvantages that prevent this sector from reaching its full potential.

Opportunities: Please describe your ideas that if acted upon could strengthen an advantage or correct a weakness.

Threats: Discuss conditions that undermine the economy, even when strengths are maximized, weaknesses mitigated and opportunities promoted

Projects and Actions: Your ideas for projects, planning, studies etc that could strengthen the market, mitigate weaknesses, promote opportunities or shore up against threats.

Appendix D: MEDA Report Livingston

RESOURCE TEAM ASSESSMENT REPORT

For

LIVINGSTON, MONTANA

April 11 - 12, 2012

In Partnership with: City of Livingston, Northern Rocky Mountain Economic Development District, Triple Divide Consulting, Snowy Mountain Development Corp., CTA Architects Engineers, Montana World Trade Center, Montana Department of Commerce, Montana Economic Developers Association and the people of Livingston.

INTRODUCTION

It was a privilege for the Livingston Resource Team to spend two days in your community. Thank you for your hospitality, your time, and for sharing with the team the vision you have for Livingston.

Before digging in to the report itself, I would like to thank Montana Department of Commerce (MDOC) for its support of the Montana Economic Developers Association (MEDA). It is a partnership between MDOC and MEDA that makes Resource Team projects available across the state.

Special thanks are due to Ed Meece, City of Livingston. Ed served as the champion behind this project and will continue to be involved with the process through activities detailed in this report. In addition, the Livingston Resource Team Assessment could not have happened without the initiative and support of the Northern Rocky Mountain Economic Development District.

In addition, I applaud each and every team member that dedicated hours of work and travel in order to participate on the team: Dick King, Triple Divide Consulting; Kathie Bailey, Snowy Mountain Development Corporation, Ken Richardson, CTA Architects Engineers, Geoff Sutton, Montana World Trade Center, and Karyl Tobel, Montana Department of Commerce.

Each team member's contact information is provided in the following report. Please feel free to call on any of us for additional information or support. It would be our pleasure!

The stage is now set for the future of Livingston. There are a number of short term and long term accomplishable recommendations that the resource team has provided in this report. Each of you individually must decide what it is that you want to do—what kind of project you want to tackle. It is also important for the entire community to be involved in finding ways to accomplish its goals. A few celebrations at the successful conclusion of an activity that has involved a large number of citizens will lead to a feeling of accomplishment that will carry over into other activities. Look through the suggestions, pick out one, and get started. It can be done. It is your choice, your decision; you can do it!

Gloria O'Rourke
Team Coordinator, MEDA

PROCESS FOR DEVELOPMENT OF THIS REPORT

According to Montana Department of Commerce program requirements, Resource Team Assessments are to be approved through the community's Certified Regional Development Corporation (CRDC). As a CRDC for Park County was recently formed, the board of Montana Economic Developers Association (MEDA) approved the project. The City of Livingston and the Northern Rocky Mountain Economic Development District served as the *local* Resource Team coordinators for the project. Montana Economic Developers Association (MEDA) provided staff support for the coordination of a resource team to assist Livingston in evaluating its assets and challenges and in developing suggestions for improving the environment, social and economic future of the area.

Ed Meece, City of Livingston, served as the local contact and local team leader for the project. Under his direction an agenda was developed, logistics arranged, as well as budgeting and publicity for the assessment. Resource team members were selected to visit, interview citizens, businesses and community leaders to develop options for projects for Livingston. The team members were carefully selected based on their fields of expertise that local officials indicated would be needed to respond to the problem or project areas identified.

The Resource Team interviewed and received written comments from over 65 people during April 11 – 12, 2012. All notes from all listening sessions as well as those submitted via email or handwritten are included in this report. The team was available for listening to the following groups: Arts and Culture, Tourism, Education and Workforce, City and County Commissioners, Downtown, Non-Profit, Health Care, Economic Development Recruitment, Agriculture and Entrepreneurship and Small Business.

Each participant was asked to respond to three questions designed to begin communication and discussion and to serve as a basis for developing recommendations in this report. The three questions were:

- What do you think are the major strengths and assets in your community?
- What do you think are the major problems and challenges in your community?
- What projects would you like to see completed in two, five, ten and twenty years in your community?

Upon completion of the interviews, the team met in a work session to compare notes and share comments. The team then agreed that each team member would carefully analyze the things said, synthesize what they heard with their knowledge of programs and resources, prepare their notes and suggestions, and forward these items to be combined into this final report to the people of Livingston.

A preliminary oral report and a summary of group recommendations were presented to the people of Livingston the evening of April 12th.

Following the oral report, this formal written report was prepared and is presented to the people of Livingston. The report is available on the MEDA website at <http://www.medamembers.org/resourceteams.html> A Town Hall Meeting is planned for Monday, June 4th at 7:00pm. The purpose of the meeting will be to briefly review the report, identify projects and set priorities for action.

LIVINGSTON RESOURCE TEAM AGENDA

Most Listening Sessions held at the Park County Public Library, 228 W. Callender

April 11th

- 1:00 PM -- Community Tour 1 PM (leaving from Murray Hotel)
- 2:30 PM – **Session # 1: Art/Culture**
- 3:30 PM – **Session #2: Tourism**
- 4:30 PM – **Session #3: Education/Workforce**
- 5:15 PM – Dinner & Evening (MEDA on their own)

April 12th

- 8:00 AM – Breakfast w/ City and County Commissioners & local NRMEDD Board Members
- 9:15 AM – **Session #4: Downtown**
- 10:30 AM – **Session #5: Non-Profit**
- 11:15 AM – **Session #6: Health Care**
- 12:15 AM – LUNCH BREAK – Teen Room – MEDA team + Pam, David, Bob, Ed
- 1:15 PM – **Session #7: Eco. Dev. Recruitment**
- 2:15 PM – **Session #8: Agriculture**

- 3:15 PM – **Session #9: Entrepreneurship/Small Business**
- 5:30 PM – **DINNER** – will be delivered to team, so they assemble their findings
- 7:00 PM – “Community Conversation” – City/County Building – Community Room

LIVINGSTON RESOURCE TEAM ASSESSMENT – MAIN ISSUES

The following list is a summary of main topics and issues that result from the Livingston Resource Team listening to the communities address strengths, challenges and their vision for the community of Livingston. This list serves as the outline for this Resource Team Assessment Report. The team plans to return to facilitate a town meeting to prioritize projects and ideas on Monday, June 4th.

MAIN TOPIC: TOURISM

ISSUES:

- ✘ Become a destination point promoting longer stays from visitors.
- ✘ Vacation packages – including Livingston businesses and neighboring communities.
- ✘ Take advantage of the historic gateway opportunities.
- ✘ Mapping, branding, signage
- ✘ Division between those who benefit from tourism and those who don't.
- ✘ Showcase arts, history, agriculture, culture, etc.

MAIN TOPIC: LEADERSHIP

ISSUES:

- ✘ Leadership program for the community; engage the youth and younger adults - mentoring
- ✘ Volunteerism – tap the uninvolved
- ✘ Reinforce cohesiveness in the community
- ✘ Cohesiveness with the city and county

MAIN TOPIC: VIBRANT LIVINGSTON

ISSUES:

- ✘ Evening Gallery events in sync with stores staying open evening hours: provide incentives
- ✘ Downtown parking

Northern Rocky Mountain Economic Development District

- 其 Directive signage, historic downtown Livingston
- 其 Farmer's Market & other promotional activities
- 其 Maintain a unique experience
- 其 Consistent look and feel beyond downtown

MAIN TOPIC: TRANSPORTATION

ISSUES:

- 其 Lack of public transportation
- 其 Need for transportation to Yellowstone
- 其 Transportation to Bozeman
- 其 Walkable community - improved sidewalks
- 其 Trail system linked east to west
- 其 Parking for recreation vehicles for both summer and winter activities

MAIN TOPIC: ECONOMIC DEVELOPMENT

ISSUES:

- 其 Workforce development – fill the technical skills gaps
- 其 Redevelopment of rail yard
- 其 Recognize/develop Strategic Plan
- 其 What will be done, by whom and when
- 其 Analyze local capacity to fund projects
- 其 Make best use of assets
- 其 Utilize workforce training funds
- 其 New development opportunities east and west end of town.
- 其 New medical campus huge asset for economic development and redevelopment opportunities.

MAIN TOPIC: EDUCATION

ISSUES:

- 其 Local jobs that require technical skills, vo-tech training
- 其 Utilize two year program – MSU?
- 其 Life skills and soft skills training
- 其 Strengthen and expand adult education program
- 其 After school activities for elementary aged students

LIVINGSTON RESOURCE TEAM REPORTS

LIVINGSTON RESOURCE TEAM REPORTS

REPORT BY: KARYL TOBEL

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Business Resources Division

Montana Department of Commerce

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INTRODUCTION:

The people of Livingston are proud of their historic community, friendly citizens, excellent theaters, beautiful art museums, great dining, and seasonal visitors - all with good reason. The charming, historic railroad town harbors a beautiful downtown with period architecture, antique signage, boutiques, gourmet eating, and unique lodging. The city is the Gateway to Yellowstone Park and Paradise Valley, is easily accessible from the freeway, and offers year-round access to outdoor activities.

While driving back to Helena I asked a few people in Bozeman what *they* thought of Livingston and this is what they said:

“Livingston is a place I run to, to get away from it all, relax and have fun. There are a few great shops downtown that I always go to.”

“Livingston does a lot in the summertime and has a great rodeo.”

“The bistro on 2nd has had national attention and is a great place to eat.”

A citizen of Livingston said it best, “It’s where you choose to be.”

MAIN TOPIC: TOURISM

ISSUE: ATTRACTION, ORGANIZATON, ACCOMMODATIONS

Attendants at the public meeting on tourism gave detailed input on the city’s challenges attracting tourism. There were numerous items mentioned that the city needs to develop including:

- Lack of communication between local groups and organizations,
- Branding – there have been some efforts but nothing is final,
- City has great access to outdoors activities and National Park,
- Need for an economic development director,
- Need for better accommodations,
- Need for vacation packages,
- Need for a positive local attitude towards attracting tourism.

Recommendations:

Lack of communication, facilitation among groups, and cohesiveness for downtown businesses stresses the need for a locally-based economic development director, or local development staff person. There needs to be points of contact that businesses and the city can rely on to facilitate meetings, coordinate priorities, and assist with the solicitation of funding to carry-out locally selected projects.

Prospera Business Network is the designated Certified Regional Development Corporation (CRDC) for the Livingston and Park County region. As Prospera staff is located in Bozeman, one option would be to have Prospera staff presence in Park County, even if only on a part-time basis; and/or have a city/county employee that can devote his/her duties to economic development activities.

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It was stated numerous times that the city needs branding, and a local interested party has worked on a branding project. As a panel listener, a final determination of what the city wants to be branded as was not clear. Hiring a professional consultant to work with the city and local economic development staff would facilitate those discussions and put in place a proper branding plan. The cities of Great Falls and Helena have completed branding efforts with follow-through erecting street banners, marketing plans, promotional materials, and airport advertising.

Once the city has made a final determination on what its brand is, it can really run with its branding and promote itself to surrounding communities, regional airports, magazines, and through other nation promotional means. The Montana Department of Commerce (MDOC) has funding sources to assist with branding planning efforts to allow the city to hire a well trained consultant that specializes in community branding through the Community Development Block Grant – Economic Development (CDBG-ED) Program and the Big Sky Trust Fund (BSTF) Program. Promoting tourism to neighboring communities is a wonderful idea as they offer a consistent supply of potential tourists that only need to travel a short distance to experience the uniqueness of Livingston. The MDOC Office of Tourism also has grants and technical assistance for local promotional activities through its Special Events Grant Program (SEGP).

Having a clear brand, and local development leadership, would help attract more choices for accommodations and conference locations, help retain tourist and local dollars, increase the chance for outside investment, and facilitate development of unique offerings such as the historical underground.

Recommended Resources:

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Prospera Business Network

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PH: 1-406-587-3113

Website: www.prosperabusinessnetwork.org

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Website: <http://travelmontana.mt.gov/forms/>

MAIN TOPIC: LEADERSHIP

ISSUE: VOLUNTEERISM, PARTICIPATION AND MENTORING

Several comments were made on volunteerism and the need for additional community involvement including:

- Volunteers help with everything and get volunteer burn-out,
- Hard to find new volunteers,
- Need for mentoring,
- Keeping youth in Livingston.

Recommendation:

It's a common thread among our cities and towns that there are a handful of energetic and passionate people who volunteer their precious time to help with causes they believe in. Volunteers hold jobs, raise families, and have life obligations, in addition to working long and hard hours to help local and national causes to better our world. They are natural leaders, and are a group that rarely hears "thank you" or receives recognition for all that they do. Finding additional people to help with local objectives can be a challenge.

The Heartland Center for Leadership Development offers training for local development officials and volunteers to learn practical, hands-on learning and networking, on leadership and community development. Heartland offers a couple of reasonably priced courses to help communities capitalize on local assets, learn from other communities how to promote tourism and business development, and how to be competitive for local and outside dollars. The courses are "Helping Small Towns Succeed", and "Home Town Competitiveness". I would encourage attendance at one or both of these courses as they offer substantive and useful information that would assist the city expand its social capital, and further its economic development efforts. Courses are offered in regions and are well attended.

The city's youth is a potential source for additional volunteers. It was stated that the high school requires students to complete a minimum number of hours of community service before they can graduate – a wonderful idea which exposes them to jobs and activities they may not otherwise experience. It was unclear if there was a local program coordinated with or without the school system where students could be mentored. Mentoring could be related to volunteerism, career exploration, and business development. I was told that students run the local theater which is an excellent example of promoting, mentoring, and capitalizing on local

talent – providing for longevity of local business and increases the likelihood that youth with a vested interest in their community will stay for the long-run.

Keeping youth in Livingston includes activities and entertainment sources that will satisfy their need for variety, keep them safe, and allow for families to keep track of their where-about. Allowing youth to have a say in what they want their community to offer, keeping them in the decision making process, and enabling them to help facilitate plans will ensure personal volunteerism, commitment, and help build community roots. Communities have enhanced their local offerings to include skate board parks, after school youth centers, community gardens, community centers, indoor pools, and other types of youth-attracting amenities. Funding for amenities can be raised through local fundraising activities or through public and private foundations. The Grant Service Center through Montana State University/Billings offers information on potential funding sources.

Recommended Resources:

Heartland Center for Leadership Development

3110 N. 40th Street, Suite A

Lincoln, NE 68504

PH: 1-800-927-1115

Email: info@heartlandcenter.info

Website: www.heartlandcenter.info/contact.htm

Grant Service Center

Grants and Sponsored Programs

1500 University Drive

Billings, MT 59101

PH: 1-406-657-2011

Email: webmaster@msubillings.edu

Website: www.msubillings.edu/grants/opportunities.htm

MAIN TOPIC: VIBRANT LIVINGSTON

ISSUES: REVITALIZATION AND MARKETING

Residents of Livingston consistently voiced pride in their local art galleries, historic downtown, preservation of local assets, and potential development of un-tapped resources. Several people voiced concern regarding:

- Need for historic and directive signage,
- Extending downtown boundaries to include consistent infrastructure enhancements,
- Need evening and downtown activities,
- Maintain the city's uniqueness.

Recommendation:

It was stated that the city has completed a downtown revitalization study and there are plans in place for aesthetic improvements to the business development district. One citizen mentioned it would be beneficial if the boundaries of the downtown could be extended so that there would be a consistent appearance throughout the area which would allow the downtown to appear more attractive. The Montana Department of Transportation has funding available to assist with the purchase of historical street lighting, signage, sidewalk and curb repair through its Community Transportation Enhancement Program (CTEP). The City of Lewistown worked on a CTEP project for its downtown which included sidewalks, curbing, store fronts, and historical lighting. Kathie Bailey was a Resource Team Assessment member and will provide contact information under her narrative and should be used as a valuable resource when considering the CTEP program.

There are several downtown development groups in the city. I asked a handful of residents if downtown businesses do joint gift certificates, and offer other promotional items. The answer was yes. Other ways to attract more people to the downtown area to shop and eat are to coordinate extended shop hours with art walks, sidewalk sales, block parties, Christmas strolls, and other promotional efforts. The city could develop a business promotion where people have to visit a selected set of businesses (which all have open houses at the same time, with drawings), receive stickers for each visit, and turn in completed sticker books for entries into a downtown gift certificate or other type of reward. Advertising should extend beyond the city and county to bring in more visitors – which would be an opportunity for packaging weekend get-aways for hotels, meals, and sites. The city has an active Chamber of Commerce and members who should work with the city and local development staff to plan and implement promotional activities.

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My conversations with people outside of Livingston led me to believe non-residents see the city has a lot of activities in the warmer months that attract people to Livingston. Winter activities need to be developed and expanded to bring more people into the city. Part of the branding, marketing, and promotional activities should include winter attractions. The MDOC has program resources that can provide financing for a professional consultant to create a marketing plan for the city once branding has been completed, and staff for technical assistance on marketing plans. The CDBG-ED and BSTF programs can assist with the development of marketing plans and other related studies.

Resources:

Michael Wherley, PE

Community Transportation Enhancement Program

Montana Department of Transportation

2701 Prospect Ave.

Helena, MT 59601

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Email: mwherley@mt.gov

Website: www.mdt.me.gov/business/ctep/

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Email: vbjornberg@mt.gov

Website: <http://travelmontana.mt.gov/forms/>

MAIN TOPIC: TRANSPORTATION

ISSUES

Transportation issues regarding the need for transportation improvements included:

- Need for more public transportation options,
- Need for tour buses or shuttles to and from Yellowstone Park,
- Need for pedestrian routes and trail systems,
- Need for parking –especially for large vehicles.

Recommendation:

On transportation I recommend that the city do a transportation study which addresses each of these issues, provides recommendations for traffic flow, potential bike and walking trails, possible bus system, public restrooms, and locate areas for parking improvements. A complete study will address potential funding sources and time lines. The City of Whitefish completed a similar study which provided a structure for enhancing traffic to downtown Whitefish and promotion of tourism. The CDBG-ED and BSTF programs can assist with grant funding for this study.

Resources:

Michael Wherley, PE

Community Transportation Enhancement Program

Montana Department of Transportation

2701 Prospect Ave.

Helena, MT 59601

PH: 1-406-444-4221

Email: mwherley@mt.gov

Website: www.mdt.me.gov/business/ctep/

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MAIN TOPIC: ECONOMIC DEVELOPMENT

ISSUE: WORKFORCE AND BUSINESS DEVELOPMENT

Session participants made many positive comments about their community and why it should attract and maintain area businesses such as the wonderful location, quality of life, nice local shopping, good housing stock, strong commitment from core businesses, proximity to a national park, and access to good healthcare. Some the challenges noted were the need for:

- Workforce development and life skills,

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- Need for new business development,
- Development opportunities for planned medical campus,
- Potential energy development.

Recommendation:

The MDOC offers assistance to businesses that need workforce development by training existing and new employees. Programs can help with formalized training through colleges and universities, and also provide for on-the-job-training. Funding applied for is dependent upon the amount of training cost per employee, number of employees needing training, and wages and benefits offered at the end of the training period. The BSTF and CDBG-ED Programs have grants for job training. Businesses can request up to \$5,000 per employee, with a maximum of \$400,000 per local government request for the CDBG-ED program. Both programs can be applied to if there is a need to train existing and new employees.

There are several resources at the MDOC for grants and loans to businesses for real property acquisition, working capital needs, infrastructure improvements, and equipment purchases. The BSTF and CDBG-ED programs both provide funding for these activities. In addition to these programs the MDOC offers low interest loans from the Wood Product Revolving Loan Fund which makes loans to primary sector businesses (more than 50% of sales are made outside of Montana).

Development of industrial parks, identifying potential new business development, feasibility studies, downtown revitalization studies, preliminary engineering and architectural studies, and other studies and plans can be partially financed with grants from the CDBG-ED and BSTF programs. A study could include identification of potential office spaces, locations for business development, or cluster development. One citizen mentioned the reuse of a rail yard building for wind turbine repair. Grants can be applied for to do a feasibility study to see if this would be a good option for the city. Both programs can be applied to at the same time to assure greater grant participation on more expensive economic development documents. Applications to both programs are accepted on an open-cycle basis depending on funding availability.

Economic development studies related to energy development, assessments, surveys, and such can be funded through the CDBG-ED and BSTF programs. The MDOC has an Energy Division that can provide technical assistance to communities considering energy development.

Potential, new, and existing businesses can find a plethora of information on the MDOC's website for the Montana Finance Information Center. Sources of information include where to go to set-up a new business; financing from federal, state and local resources; links to the MDOC's housing and public facilities programs,

Northern Rocky Mountain Economic Development District

Census and Economic Information Center, International Trade, Research and Commercialization Grants, technical assistance from the Energy Division, and other useful information.

Resources:

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MAIN TOPIC: EDUCATION

ISSUE: The community expressed a need for adult education, life skills training, business development, and vocational training.

Recommendation:

The city needs coordination with the university system. Does Livingston have a business incubator where start-up businesses can utilize low-cost space while they grow their businesses? An incubator can provide low cost access to business equipment and resources for a specific length of time at which point, the business can “graduate” and operate on its own. The City of Hamilton has a successful incubator in place and works through the University of Montana.

Does the city have a community kitchen where businesses can develop their products, learn about state promotional programs, develop product labels, and learn marketing? Lake County Community Corporation operates the Mission Mountain Cooperative Development Center where small businesses can manufacture their products, learn about the free Made in Montana Program, develop labels, and access free marketing advice. This Center also works through the university system.

Feasibility of starting an incubator, a community kitchen, or other types of business development tools can be financed through the BSTF or CDBG-ED programs.

Getting youth and adult citizens involved in volunteerism, mentoring programs, and community goal development, will help teach life skills, encourage commitment, promote business development, attract tourism, and make Livingston and even better place to live and work.

On the job training or formalized training expenses can be accessed through the CDBG-ED and BSTF programs for businesses that need to create new positions, or need to train their staff to maintain their businesses.

Resources:

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Billie Lee, Director

Lake County Community Development Corporation

Mission Mountain Cooperative Development Center

Northern Rocky Mountain Economic Development District

407 Main Street SW

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PH: 1-406-676-5901

Email: lccd@ronan.net

Website: www.lakecountycdc.org

CONCLUSION:

The City of Livingston has many advantages over communities with fewer resources. It has a multitude of educated business owners, united community commitment to maintaining the city's unique qualities, a large number of non-profit organizations, multiple business development groups, and devoted volunteers. With leadership from the city, local development staff, and professional consultants experienced in branding and marketing, Livingston could easily become a destination for other Montanans and visitors from other states year-round.

REPORT BY: KATHIE BAILEY, EXECUTIVE DIRECTOR

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MAIN TOPIC: TOURISM

ISSUES:

- ✦ Become a destination point promoting longer stays from visitors.**
- ✦ Vacation packages – including Livingston businesses and neighboring communities.**
- ✦ Take advantage of the historic gateway opportunities.**

Recommendations:

Livingston's strength lies in its location to Yellowstone National Park and Interstate 90. Community members have identified the strengths and weaknesses associated with the current situation. All that remains is to agree on the action plan and implement it. There are many resources that can help you accomplish this implementation plan such as the following:

Yellowstone Country's Marketing Plan:

http://travelmontana.mt.gov/marketingplan/Region_CVB/Yellowstone/yellowstone_mp.asp

Yellowstone Country's website: <http://yellowstonecountry.net/>

Yellowstone Country is designed to market your region yet if you check out the website you see very few places to see and visit within the Livingston community. Each of your 14 galleries, theatres and museums should be linked to this website or featured on the site. Fine dining such as that at the Murray should be highlighted on the website. The County Commissioners appoint representation on this board and if you have a recommendation for those positions, you should contact them about that representation. This board receives a portion of the Montana bed tax paid by hotels and motels in your community and usually have grants available for marketing efforts.

Resources:

Prospera Business Network

2015 Charlotte Street, Suite #1
Bozeman, MT 59718
406.587.3113

<https://www.prosperabusinessnetwork.org/>

<http://businessresources.mt.gov/CRDC/default.mcpX>

Certified Regional Development Corporation's (CRDC's) are able to apply for planning funds through the Big Sky Trust Fund category II. These funds could help with planning efforts such as developing a community marketing or branding plan. Prospera is your community CRDC and should be consulted if interested in developing one of these plans.

MAIN TOPIC: LEADERSHIP

ISSUES: Leadership program for the community; engage the youth and younger adults - mentoring

Recommendations:

Many communities have patterned a community leadership program after the “Leadership Montana” program. The Leadership Helena Committee assists local leaders to learn more about the diversity and opportunities in the Helena area and encourages their involvement in community and Chamber activities. Class members learn from speakers who are experts in their fields as well as taking several tours of community, government, business and non-profit organizations. Junior Leadership Helena is an extension of the adult Leadership Program and is formatted to enable high school juniors the opportunity to enhance their leadership skills. Leadership programs such as this could encourage young members of the community to step forward into leadership positions, increase volunteerism, and reinforce cohesiveness within the community.

Resources:

Some websites to check out on this type of program are as follows:

<http://www.leadershipmontana.org/>

<http://www.bozemanchamber.com/about/programs.asp>

<http://www.helenachamber.com/aboutthechamber/committees.htm>

<http://www.missoulachamber.com/cwt/external/wcpages2/wcdirectory/directory.aspx?action=afflistodemp&affcode=lm%2024>

ISSUE: VOLUNTEERISM – Tap the uninvolved

Recommendations:

THE ASK – The greatest words of wisdom I can impart to you regarding increasing volunteerism and building a cohesive community is “the ask”. Many times, we just simply need to ask to get others engaged in the community, volunteering and supporting community goals. One on one personal contact and asking for another to join in your efforts is an extremely powerful tool that is much underutilized.

Resources:

Recently, I read about a Volunteer Network/Bank that offered people to trade skills in return for earning credit of hours to cash in for work that they needed. http://en.wikipedia.org/wiki/Time_Banking or <http://timebanks.org/> The program required a “bank” organization which could be ran by a volunteer or check out the TimeBanks USA organization. It works like this: I babysit for you for four (4) hours and bank my four (4) hours; then I use my four (4) hours by having someone clean my house for two (2) hours and someone painting my garage for two (2) hours; then those that painted or cleaned my house used their hours to help with carpooling, or raking their lawn, or baking cookies for a school bake sale and so on and so on. It takes a large network of people wanting to trade services to make it work, but I think it is a unique idea that could work and might increase volunteerism within the community. Seniors could be a prime group to use and provide these services as they have a wealth of skills gained over a lifetime experience and great needs as their health and physical condition deteriorates.

ISSUE: COHESIVENESS IN THE COMMUNITY

Recommendations and Resources:

Central Montana has a *Human Services Coalition* that meets monthly. Approximately 30 human service and non-profit organizations meet to share what they are doing. The coalition is not an action group or accomplishes anything other than to market programs, projects and events amongst each other and learn about opportunities to collaborate. The coalition has been functioning for nearly 20 years with little community publicity or acknowledgement. The monthly meeting is held over the noon hour and a half. Each month a different agency hosts the event by sending out reminders to the groups and taking minutes for the meeting. Everyone brings a sack lunch and the meeting consists of everyone having about 3 minutes to tell the others what is going on in their agency and to share handouts of activities. It keeps everyone in the “loop” and helps build cohesion and consensus in the community.

MAIN TOPIC: TRANSPORTATION

ISSUES:

- ✦ Lack of public transportation
- ✦ Need for transportation to Yellowstone
- ✦ Transportation to Bozeman
- ✦ Walkable community - improved sidewalks
- ✦ Trail system linked east to west
- ✦ Parking for recreation vehicles for both summer and winter activities

Recommendations and Resources:

There are many transportation issues that need to be investigated further to determine if they require legislative changes, have permitting issues, or can be effectively implemented with resources. A 20-year community transportation plan needs to be developed that will establish a master plan with projects prioritized and funding sources identified. The Big Sky Trust Fund Category II planning grant through the local CRDC (Prospera Business Network) or the Montana Department of Transportation might be resources to assist in this planning endeavor. Livingston as a community would certainly have an immediate economic benefit and connection to the Yellowstone National Park if transportation infrastructure between the Park and City could be facilitated. Near-term projects such as identifying year-round parking areas within the community for large vehicles should be immediately identified. Programs such as the Community Transportation Enhancement Program (CTEP) and Safe Routes to Schools may help with parking or sidewalk or trail development. The Montana Conservation Corp <http://www.mtcorps.org/mcc-projects> has provided an affordable labor pool for trail development within other communities of the state.

MAIN TOPIC: ECONOMIC DEVELOPMENT

ISSUES:

- ✦ **Recognize/develop Strategic Plan**
- ✦ **Make best use of assets**
- ✦ **Utilize workforce training funds**
- ✦ **New development opportunities east and west end of town.**
- ✦ **New medical campus huge asset for economic development and redevelopment**

Recommendations and Resources:

Livingston has a core group of manufacturers such as Printingforless which might be interested in expanding their business or encouraging other manufacturers to the cluster through the use of a local manufacturing alliance similar to the one in central Montana/Lewistown. The Montana Manufacturing Extension Center (MMEC) can be helpful in working with these manufacturers. Members of the Central Montana Manufacturing Alliance (CMMA) in Lewistown are willing to assist manufacturers in other parts of the state develop an alliance similar to the group in Lewistown. The CMMA has been in existence nearly ten years and manufacturers have found a way to work together on projects, discuss common concerns and marketing methods, capitalize on private resources within the community, and expand operations through local networking.

<http://www.mtmanufacturingcenter.com/>

Livingston is unique in its depth of economic development resources and expertise. The numerous economic development agencies could collaborate together, market services collaboratively, determine separation of duties and align resources to have a tremendous impact on this area. Collectively they could share in securing regional resources such as the site selector program (GCS research, Bryan Ralston, 405-532-3254, bralston@gcs-research.com ; www.GCS-RESEARCH.com) currently being used by other economic development organizations in the state. Each agency could serve as the greatest referral system for the other agencies. If these agencies could meet occasionally and share information about projects they are working on, coordinate some community planning efforts and build a cohesive group, nothing could stop this formidable group. A list of those agencies may include:

Livingston Job Service, Northern Rocky Mountain Economic Development District, Prospera Business network, Northern Rocky Mountain EDD Board, Business Expansion and Retention (BEAR) committee, Main Street Program, City, County, Chamber of Commerce, Food Bank, Western Sustainable Systems, MSU-Bozeman Outreach, Community Foundation, Business Improvement District, Urban Renewal Area, School District and others I may be forgetting to mention.

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A. INTRODUCTION

MEDA's Community Assessment Team listened to about 60 people during a day and a half of meetings. Participants identified six broad issues:

- Tourism and the need to promote the community as a destination.
- The need to involve more of the community as volunteer leaders, including serving as board members for the many non-profit organizations that are serving Livingston and the surrounding area.
- Promoting a vibrant community. This would include continued emphasis on revitalization of the downtown business district and developing a “brand” to market the community to visitors.
- Improving transportation options for residents and visitors. Development of a public transit option for tourists to visit Yellowstone National Park was one proposal that many participants in the assessment process mentioned. Another example would be expanding the existing transit service between Livingston and Bozeman. Participants also highlighted the importance of walking and bike trails that would connect the community.
- Economic development was a key issue. Many pointed to the need to have a single point of contact for businesses considering relocation to the area. The pending lawsuit with BNSF regarding contamination of the rail yard and adjacent property was a huge cloud that made discussion of economic development opportunities difficult. The settlement that was announced on May 9th, however, offers hope that this impediment will be gone in a couple of years. Other economic development issues included relocation of the hospital, workforce training and the need to establish a community college, increasing tourism especially during the winter, and recruitment of new businesses to the industrial tax increment district that currently has one occupant (the very successful Printing for Less).
- Another significant issue identified during the assessment process was education. The local school district has strong community support, but declining enrollment is creating financial hardship. The assessment team also received numerous comments regarding the need for post-secondary vocational and technical training.

These issues are significant and the other members of the MEDA assessment team address them in their reports, along with recommendations and possible resources. Although this writer could do likewise, it seems to me that one member of the team should address the broader issue of how the community can come together, continue the assessment process, stimulate public involvement in that process, and produce a comprehensive needs assessment that can be used to prepare a strategic plan identifying specific actions and assigning responsibility. The many economic and community development activities already underway in the community are impressive, but participants also made it clear that the community needs more focus on its greatest priorities, more involvement of its citizens in the process of determining those needs and priorities, and more resources to accomplish important tasks identified in the strategic plan. The plan would be a living tool that would prioritize goals and ensure accountability for years to come. The development of a good strategic plan for

the community would be a major undertaking but given the many opportunities that were identified in MEDA's assessment project, the effort would be worthwhile and could be the catalyst for increased community involvement. The people of Livingston are clearly proud of their community and despite the economic setbacks that have impacted the community, one of the participants summed up the attitude of many residents with the statement that Livingston is a "where you want to be kind of place."

This report will include a brief summary of Livingston's history and its current situation, an outline of what participants in the MEDA assessment believe is working well in their community and what is not working so well, and a sample of projects and initiatives that could be included in a strategic plan. Finally, the report will briefly describe the steps that need to be taken if the community decides to launch a comprehensive needs assessment resulting in a strategic plan that would guide its efforts for community and economic development for many years.

B. MONTANA'S FIRST TOURIST DESTINATION

One need only stop at the depot building in Livingston, which now is home to the Depot Center, to understand the significant role that the community played as the gateway to Yellowstone National Park. The Depot is home to a museum and also to arts and cultural activities that celebrate this heritage. The construction of the historic depot building triggered development of one of the greatest downtowns in all of Montana. The community is indeed fortunate that most of this development still exists. Historic Livingston is an appealing place for tourists, visitors and residents.

The community's relationship with the railroad has a long history. In addition to being Montana's first tourist destination, Livingston has also been home to a large number of railroad workers, many of whom were employed at a locomotive repair and maintenance facility. Employment at the rail yard peaked in the 1950's with about 1,100 jobs. The shop complex, which includes an active rail yard, is approximately two miles long and one-half mile wide, and includes locomotive and rail car [repair](#) and maintenance shops. Montana Rail Link (MRL) is the current rail yard operator. These facilities have been closed for several years, and the loss of good paying jobs has prevented the community from growing. In 2006, Park County's workforce numbered about 9,300 workers. By 2011, that number had declined by 13 percent to approximately 8,100. The community has also seen declines in school enrollment and population, as well as jobs.⁴

⁴ In 2011, per capita income in the U.S. was \$41,663. At \$36,573, Montana's per capita income was 88% of the nation's and Park County, at \$33,428, was 80%. For the same year, the average wage per job in Montana was \$33,918, but only \$29,652 in Park County. Personal income in Park County declined from \$570 million in 2008 to \$535 million in 2010. Sources: Montana Census and Economic Information Center (www.ceic.mt.gov) and the American Community Survey (<http://www.census.gov/acs/www/>).

C. “THINGS ARE STARTING TO HAPPEN”

Despite the economic hardship caused the closure of the railroad’s repair and maintenance facility, Livingston has persevered. It is home to a vibrant arts and culture community, including a local theatre group, fourteen art galleries, and two museums. Livingston still draws many tourists, especially in the summer. Many people who attended the meetings with MEDA’s assessment team emphasized that tourism, in the words of one participant, “is our best opportunity for jobs.” The importance of the downtown cannot be emphasized enough and redevelopment and revitalization activity is gaining momentum with the recent establishment of a Business Improvement District and an Urban Renewal District, both in the downtown area. After a couple of years when no increment was available for investment in improvements, the URD is now generating positive capital that is being directed to key infrastructure improvements, such as curbs, sidewalks and street.

The lawsuit with Burlington Northern Santa Fe regarding the environmental cleanup has been a negative factor for several years, however. This cloud has been lifted by the recently announced settlement. Given the fact that the community has remained a vibrant place despite the loss of railroad jobs and the Super Fund designation prompted a local businessman to remark at one of the MEDA assessment meetings that “things are starting to happen.”

D. WHAT IS WORKING WELL IN LIVINGSTON?

The following is an abbreviated list of what participants in the assessment meetings believe is working well in their community:

- Livingston is home to a large and diversified arts and culture community that includes a community foundation, a local theatre group, the Yellowstone Gateway Museum and the Depot Center, as well as numerous art galleries and restaurants located in the downtown area. A local farmers market has been established and is expanding every year. The community is also home to numerous festivals and art events. All this activity creates an energy that many other communities can only wish for.
- The City of Livingston is well managed and doing an excellent job maintaining and improving essential infrastructure systems (such as its wastewater treatment plant). The City has established a good working relationship with the Montana Department of Transportation, and the Department will be spending \$14 million on improvements in the community this year and next. The City is working to expand its network of walking and bike trails, which are popular. The Business Improvement District is providing services to make the downtown more attractive and the Urban Renewal District is funding bricks and mortar projects and making the downtown more appealing to walkers. Although the City is “lean” financially, it is clearly doing as much as possible to make the community an attractive place for arts and cultural organizations as well as businesses.
- Livingston is blessed to have, in the words of several residents, “excellent health care.” Community Health Partners, which provides service to everyone regardless of the ability to pay, has its headquarters in Livingston and operates similar facilities in Bozeman and Belgrade. Livingston Memorial Hospital provides employment for 320 residents of the area and is looking to build a new facility west of town. The community also has three retail pharmacies. Health care providers report that they are able to attract and retain quality medical staff, due in part to the quality of life in Livingston. They also stated that a collaborative working relationship has been established that ensures the best quality of care for patients from Livingston and Park County.
- Printing for Less is a home grown company that now employs more than 100 workers. The company is located in an industrial tax increment district that has an additional 70 acres available for light industrial, high tech, and other development. The City has 40 more acres adjacent to the TIF district that could also be used to attract new companies to the area.
- Livingston is home to many non-profit organizations that, despite the competition for funding that is a common occurrence in every community, work together and support each other.
- One of the community’s most unique non-profit organizations is the Western Sustainability Exchange, which promotes the consumption of local agricultural products and, since 2002, has sponsored the Livingston Farmers’ Market.
- With regard to education and workforce training, many positive comments were made during the assessment meetings regarding the local school district. The community also has an adult

education program and is working with Gallatin College at Montana State University to establish a vocational and technical training program that would enhance the skill level of the local workforce.

- Another positive is Prospera, which provides financial and technical assistance services to communities in Park and Gallatin Counties. The non-profit development organization is based in Bozeman, and recently help fund a building renovation project in Livingston’s downtown. The borrower, a specialty bakery and deli, will be a positive addition to the community and will create several new jobs for residents of the community. The relationship with Prospera has the potential of helping other businesses in the community secure needed financing for expansion and job creation.
- In addition to the resources and assistance that Prospera can bring to Livingston, the community is also served by the Northern Rocky Mountain Economic Development District. NRMEDD is currently completing a Comprehensive Economic Development Strategy for Gallatin and Park Counties.

E. WHAT IS NOT WORKING SO WELL IN LIVINGSTON?

Clearly, Livingston has a lot going for it. Despite its struggles to provide good jobs for residents in the wake of the closure of the railroad’s car and locomotive maintenance facility, the community has achieved progress. But, as with any community, there are obstacles to overcome and problems to solve. The following list is a summary of comments from participants in the MEDA assessment meetings regarding what is not working well in the community:

- Although tourism clearly is important to the community, there are issues that prevent Livingston from realizing the full economic benefit of this industry. Examples cited by participants in the assessment process included a lack of quality lodging facilities, shortage of parking, especially for RVs and boats, the negative attitude of some residents toward the industry, the need to pull traffic off the Interstate into the community, a weak marketing effort, and need for transit options to the Northern Entrance to Yellowstone National Park.
- Arts and culture is a strong component of community life in Livingston, but the competition for funding support often weakens efforts to build collaboration and communication between organizations.
- There are also several organizations that represent small businesses in the community and their efforts to improve the business climate are also hampered by competition for resources.
- With regard to the community’s workforce, several participants expressed concern regarding the high number of low paying jobs⁵ and the lack of a community college that would provide

⁵ The need to create jobs was a common theme for many. This viewpoint is supported by economic data. According to the Bureau of Economic Analysis, total employment in Park County in 2007 was 10,125. This fell 9% to 9,236 in 2010 (www.bea.gov).

vocational and technical training. Some employers pointed to a poor work ethic as a problem when they hire new people, and also cited the need for post-secondary training and education.

- Although many residents commute to Bozeman for employment, the lack of a transit system between the two communities is a problem for some workers.
- Everyone expressed strong support for the community's primary and secondary schools, but also noted that the dropout rate is too high and that enrollment is declining, causing financial concerns.
- As stated earlier, residents of Livingston are proud of their health care system. But, several participants in the assessment process highlighted the lack of pediatric care and mental health services. They also noted that the community has an aging population, which will require more health services, and that these services need, to the maximum extent possible, to be provided locally. Another problem involves the construction of a new facility for Livingston Memorial Hospital. Several issues have delayed the project, including flood plain questions and possible contamination from the rail yard. The project is crucial to the hospital and its ability to provide quality care (the current facility, built with Hill-Burton funding in the 1950's, is inadequate and does not have sufficient room for expansion).
- Several concerns were also expressed regarding the community's economic development needs. Although growth of the tourism industry would create jobs, most of those would be pay low wages. In the opinion of many, the community needs to also create good paying jobs for its residents as well as promote tourism. Several comments were also made regarding the need for a central point of contact to respond to inquiries from businesses interested in moving to the area.

F. SOME IDEAS OF WHAT COULD BE DONE

The MEDA assessment team heard many suggestions and ideas regarding actions the community could undertake to address what's not working well in the community. The following list is a brief summary of the many specific ideas that participants offered during the assessment meetings:

- To promote Livingston as a destination for **tourists and visitors**, the community needs to develop a unique and distinctive brand and use that to provide consistency to marketing efforts, including signage.
- The visitors center needs to increase staffing, which should include a representative of the Park Service.
- The community should seek an increase in funding from the bed tax to support its marketing campaign (Livingston lodging facilities collect about \$120,000 in bed tax annually but get back only \$8,000).
- Steps need to be taken to improve cooperation between organizations and build greater cohesiveness in the community regarding its efforts to improve the economy and help businesses create quality jobs.

Northern Rocky Mountain Economic Development District

- The community should work with Gallatin College and develop a physical presence in Livingston. This could be done in cooperation with the Food Pantry and that organization's effort to develop a commercial kitchen.
- The City should continue its efforts to make Livingston a more attractive place, and these efforts need to be supported by the Business Improvement District and the Urban Renewal District.
- Develop methods to encourage occupancy of second floors in downtown buildings.
- Strengthen the community's economic development effort.
- To the extent possible, accelerate implementation of the downtown revitalization plan, including upgrades of curbs and gutters.
- Preserve and redevelop underground Livingston.
- Encourage Livingston businesses to become members of Prospera.
- Oversee the environmental cleanup of the rail yard and adjacent property, complete an assessment of the condition of existing buildings that were used for rail car and locomotive maintenance and repair, and develop a marketing plan for these facilities that will be targeted to companies that could use these structures and create quality jobs in the manufacturing and light industrial sectors.

The above list would be much longer if it included all the suggestions and ideas that were proposed during the MEDA assessment process. It is clear, however, that the community has no shortage of opportunities. To convert potential into reality, however, requires a well planned, organized and accountable community effort. The assessment process highlighted many positive aspects of the community, as well as several hurdles that will need to be addressed. This writer highly recommends that the community use the reports generated by the MEDA assessment team as the first step toward development of a comprehensive needs assessment and strategic plan that will guide the community for years to come, assign responsibility, track progress, and that can be updated on a regular basis.

G. THE STRATEGIC PLANNING PROCESS

Many communities, regions and even states have prepared strategic plans to guide their economic development efforts. A good process involves preparation of a comprehensive needs assessment that would include extensive research and public involvement. This process would require 3-5 months to complete and would be followed by development of a plan to identify priorities, set time lines, and determine who will be doing what. The strategic plan would require about two months to complete if the needs assessment process is high quality. A consultant should be hired to work with the community on the needs assessment and strategic plan. Selection of the consultant would be based on qualifications, availability, and cost. For planning purposes, a cost estimate of \$35,000 is recommended.

But, hiring a consultant does not in itself ensure a quality strategic planning process that produces a plan that has true community support and ownership. If Livingston decides to embark on this route, a steering committee should be created. The committee would have representatives of all sectors of the community and would not only oversee the planning process but also assume responsibility for implementation and reporting progress on a regular basis. Accountability is key to successful implementation of a community economic development strategic plan.

Potential funding sources for the community needs assessment and strategic plan include the Montana Big Sky Trust Fund (Category II planning grants), the Montana Community Development Block Grant Program (Planning Grant Program), and the U.S. Economic Development Administration (Planning and Local Technical Assistance programs).

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MAIN TOPIC: LEADERSHIP

Issue: Leadership Programs

What we heard: The Livingston community currently does not have a structured Leadership Program. The desire is to engage both the youth and younger adults. This includes mentoring by long time community leaders.

Recommendations: Model a Livingston Leadership Class after one or more tried and true applications.

Example 1 – Leadership Bozeman 24

From their website: How does a community ensure that its future will wind up in the hands of people who can maximize it's assets and minimize it problems? Leadership Bozeman was created by the Bozeman Area Chamber of Commerce in 1987 to develop informed, vigorous, skilled and effective leaders for involvement in all facets of the community, public and private. This eight month class consists of one full day per month where the participants learn about a different aspect of the community each month, enabling them to participate and serve in their community as an informed business member. Selection begins in July, and the classes run August through May.

Recommended Resources:

Please contact the Chamber at 406-586-5421, for more information.

Leadership Bozeman 24 Program Coordinators are Nicole Evelyn and Daryl Schliem, BACC

Comment: Having been through Leadership programs in three different communities, ranging from 500,000 to 50,000, one principal holds true. After spending the better part of a year with your classmates you become a fraternal group. The level of trust is elevated, communication is easily facilitated, and having a list of “go-to” people makes projects easier to tackle.

Example 2 – Leadership CDA Committee

Mission Statement: To identify citizens of the area who have demonstrated the potential for leadership; to provide Information which will develop knowledge and understanding of our community, its complexities and its potential; to create an opportunity for participants to meet and exchange ideas with current community/area leaders; to motivate participants to pursue leadership roles in the community; and to provide participants an opportunity to network and discuss issues in an informal and learning environment.

Recommended Resources:

Contact: Brenda Young
Program & Events Manager, CdA Chamber
P: 208.415.0110
E: Brenda@CdAChamber.com

Comment: This example from Idaho shows a monthly commitment to keeping their leadership exchanging ideas and accomplishments. I can say from experience that Coeur d’ Alene has one of the strongest leadership organizations going. This enthusiasm allowed the Coeur d’ Alene community to be awarded the Kroc Center-CdA <http://www.kroccda.org/sports.html> , a multi-million dollar facility they can all be proud of.

Example 3 – Leadership Montana

Mission Statement - As Montana looks to the future, we face a changing and challenging economy, ever more complex issues regarding the health and security of our people, our management of natural resources. We see an increasing need for our communities, our businesses and our government to be partners for a strong, growing Montana.

Progress depends on developing a sustainable core of committed leaders who understand these issues, are willing to listen to and learn from each other, celebrate cultural diversity and diverse opinions, and demonstrate a passion for the Last Best Place. <http://www.leadershipmontana.org/site/home/>

Recommended Resources:

Leadership Montana

c/o Montana State University Billings
1500 University Dr, McDonald Hall #140
PO Box 1373
Billings, Montana 59103-1373
406-896-5877 (office)
MTleaders@leadershipmontana.org

Mary Hernandez

Interim Executive Director
Ph. 406-690-2967 (cell)
mhernandez@msubillings.edu

Comment: The program, Leadership Montana, will connect Livingston’s leadership to a much broader network of like-minded Montanans. Again, the nine month time commitment and state wide travel help to reinforce the bonds within each graduating class.

Example 4 – Montana Youth Leadership Forum

Description - MYLF (pronounced “my life”) is a unique career and leadership training program for high school sophomores, juniors, and seniors with disabilities. By serving as delegates from their communities at a 5-day intensive training, youth with disabilities will cultivate leadership, citizenship, and social skills.

Mission - To identify students with disabilities who have exhibited leadership skills and equip them with additional training so that they may become leaders by example. www.montanaylf.com

Recommended Resources:

MYLF Program Director

June Hermanson, M.S. Education, B.A. Social Work
1617 Euclid Suite 1
Helena, MT 59601
(406)442-2576 Voice/TDD mylfjune@bresnan.net

Comment: While not familiar with this Leadership Forum (MYLF) it presents a unique opportunity to the community to engage a wider range of leadership styles and engage youth, one of the desired requests.

ISSUE: VOLUNTEERISM

What we heard: Repeatedly, the attendees from Livingston said that one of the greatest treasures is in the people of their community: individuals who are willing to step up and volunteer. The problem is that the same small group of people is doing a bulk of the work. This can lead to brain drain and burn-out on projects.

Recommendations:

Volunteerism – tapping the new leadership recruits. Feed off the recommendations in the Leadership Programs (above). Typically these are new faces, already committed to seeing a better community and State emerge from their efforts. Leadership programs tend to invigorate and energize their graduates to jump in as volunteers. Move quickly to engage them in community projects, recruiting, etc.

Volunteerism –“ in the moment” recognition and reward. What we call the “wooden nickel” program within our company – if a co-worker or manager sees someone going above and beyond the call of duty – they can immediately reward them with a wooden nickel. This wooden nickel can be turned in for a gift card (range from \$25- \$50) to be used however they like.

This “reward program” could be started by your Chamber of Commerce. The wooden nickel and gift card can be custom designed (branded) to raise awareness for good deeds done in the community. Individual business can purchase the nickels and gift cards from the Chamber, and have them on hand for “in the moment” recognition/rewards.

While not aware of any community currently doing this, it would be a fantastic pilot project for your community to launch. Visualize the lucky recipient using their gift card for a nice meal, and the restaurant sees “that gift card” and offers up free desert as a further thank you!

Volunteerism – keeping the momentum going. We all know that volunteers are the life and heart of a community. Here are some ideas for preventing the dreaded Volunteer Burn-Out:

Ask first if they'd like to be publicly acknowledged, then include them in a “recognition event”:

1. Send a letter to their supervisor at work...tell the manager how much you appreciate their hard work and special qualities.
2. Write a short recognition piece in your organizations newsletter, blog, or other social media.
3. Have your board or a staff member call, letting them how much they are appreciated.
4. Send a visitor with a flower.
5. Have a board member or other special person invite them to an executive lunch in a special place.
6. Invite them to a special event or dinner...and honor them there.
7. Write an article about their work in your local or city newspaper. Ask a reporter to interview them.
8. Call them to talk and get their ideas.
9. Reward them with a wooden nickel!
10. Give them more responsibility - but watch for burnout!

Recommended Resources:

For additional information and ideas, please visit the following websites on finding and keeping volunteers:

<http://www.cristina.org/guide/volgui2.html>

International – Australia:

<http://www.communitybuilders.nsw.gov.au>

ISSUE: COMMUNITY COHESIVENESS

What we heard: A desire to reinforce the cohesiveness within the community. The benefits of having many stakeholders engaged in building the assets of the community – including individuals, organized groups, non-profits, businesses, city government, county government, even State and Federal agencies.

Recommendations:

Being nimble and quick to act – another community in the state has assembled a trusted “swat team” for business recruitment. The “swat team” consists of people with individual skill sets and access to specific resources depending on the need. Examples include a Senator staff person, a city representative, a site manager for an available real estate park, a commercial realtor, members from the A/E/C industry, a financing and grant specialist, and a member of the local economic development organization. This core group can reach out into their respective business groups to quickly find what is needed to answer inquiries. The group agrees to quick bag lunch meetings for mobilization, updates and follow through.

Communication leads to cohesiveness - the simple principle that if we are communicating, and often, we are more likely to exchange, understand, and adjust to multiple points of view. A community that communicates with each other, will find common ground, issues to rally around, and solidify objectives to attain. A cohesive community leads to successful projects.

Example – please look at the Coeur d’ Alene Chamber website (below). They have included stakeholders from affiliate organizations, including contracting management services when needed. Affiliate organizations include the Arts and Culture Alliance, the Downtown Association, the North Idaho Centennial Trail Foundation (a

pedestrian & cycling trail organization), and the Convention and Visitor Bureau. These groups work together to improve the visitor experience on multiple levels, from biking, to theater, to shopping and beyond.

Recommended Resources:

<http://cdachamber.com/your-chamber/about-the-chamber/>

Comment: What we heard – the community perceived City and County government were working well together on such topics as solid waste management, recycling programs, and extending city services into previous county territory. There was a general perception that the City was making good strides leading community projects. Generally, a positive and hopeful attitude is held about moving forward.

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MAIN TOPIC: THE ARTS AND CULTURE

ISSUE: The arts and culture are too seasonal, and sometimes they create a polarized community.

How can the arts increase visitation to Livingston and benefit the whole community?

Recommendations and Resources:

Livingston is really one of the gems of the visual arts sector. Home to 14 galleries, it's known as an "ARTS COMMUNITY". Combined with its strong theatre, writers and museum culture, it certainly qualifies as a creative community. This quality of life asset in itself is a strong recruiting tool for professionals and new industry to locate in Livingston.

1. Integrate the arts community in recruiting new businesses to create more local buying power.
2. Find ways to work together to promote all of the businesses.
3. Better signage and promotions with other communities to attract visitors off I- 90.
4. Continue to upgrade the historic downtown infrastructure.
5. Find ways to work more closely with the Montana Arts Council, and Travel Montana.
6. Have a cross medium arts festival with guest artists from out of town where cowboys and anglers mix with painters and actors.

MAIN TOPIC: TOURISM

ISSUE: MARKETING LIVINGSTON

How does Livingston wish to market itself? What is the image that will attract visitors to stay longer? What are its infrastructure needs?

Recommendations and Resources:

1. Any marketing plan should be inclusive, utilizing all of the community's assets.
2. Create unique winter packages which include spa, hotel, restaurant, meet an artist, go snowmobiling in Yellowstone, ski trips, and theatre tickets etc.
3. A tour bus company or some sort of public transportation is needed. Montana Department of Transportation can help.

4. Distribute coupon books with discounts at local businesses to encourage longer stay. Example: Buy two get a third night free with a dinner special.
5. Clean up the entrances to the town. Right now it doesn't reflect the treasure to be found in Livingston.

MAIN TOPIC: NON-PROFITS

ISSUE: STRENGTHENING OF NON-PROFITS

Recommendations:

1. Co-op services such as accounting, bookkeeping and janitorial to save money on overhead.
2. Write grants cooperatively. Funding agencies are looking for more bang for their bucks.

MAIN TOPIC: VOLUNTEERISM

ISSUE: RECRUIT AND RETAIN

How do you retain and recruit volunteers to support your community?

Recommendations and Resources:

1. Something I did in my business was to review donation requests once a month with my staff. I would let staff members pick what they wanted to donate, to as long as they would be involved in some way as a volunteer in that organization.
2. Host a Volunteer Training Day where all the non-profits get together to educate the community about who they are and what opportunities are available to community members.
3. Promote philanthropy by explaining the benefits to the donor and the community. Be prepared and look and act professionally.
4. Have a clear vision of your goals and mission. Strategic planning is a must. It helps with fund-raising and when asking someone to volunteer for your organization. Don't waste volunteers time by not having tasks clearly defined.
5. Do nice things for your donors, so they know they're appreciated.

MAIN TOPIC: ECONOMIC DEVELOPMENT

ISSUE: MARKETING AND BUSINESS RECRUITMENT

Recommendations:

1. Rail? Art? Recreation? Livingston isn't one thing or idea. All aspects have value and should be used as recruiting tools.
2. Creative communities attract creative people and companies.
3. Recreation located nearby is a quality of life asset.
4. The Rail yards and the Historic downtown add a sense of community and the history of where Livingston comes from.
5. Use web-based technology to create a one stop information site that includes realtors, businesses, art, city-county government, recreation, any incentive programs available to new companies.
6. Local jobs help all parts of the economy and benefit the diverse interests of the community

Resources:

- Montana Arts Council //art.mt.gov email mac@mt.gov
- Travel Montana www.visitmt.com/
- The NGA center for best practices issues briefs "The role of the Arts in Economic Development" (June 2001); "The Impact of Arts Education on Workforce Preparation" (May 2002) and "How States are using Arts and Culture to Strengthen their Global Trade Development" (May 2003); Contact Pual Kalomiris 202 624 5379.
- Montana Industry Cluster Analysis, Montana Governor's Office of Economic Development, May 2003. Contact Jackie Williams, 406 444 5634

LIVINGSTON RESOURCE TEAM ASSESSMENT - STRENGTHS

APRIL 11 – 12, 2012

WHAT ARE THE MAJOR STRENGTHS AND ASSETS OF LIVINGSTON?

The Arts and Culture

- Fascinating history
- Connection with Yellowstone National Park
- Community itself – the people, including longtime families and newcomers
- Cultural center; 14 galleries in town
- Huge base of artists
- **Community that accepts quirky artist's.**
- Friendly – Montana is friendly but Livingston especially so.
- Two museums
- Two community theaters
- Hunting, fishing, recreation
- Tourism
- Summerfest
- Many buildings on the National Historic Register
- Community Theater Center
- The Depot Center -
- **Biggest asset is location, location and location.**
- Architecture is pleasant.
- Location!
- **Best managed city in Montana.**
- Great downtown.
- Yellowstone Bus Service
- Urban Renewal
- Business Improvement District (BID)

Tourism

- Railroad and mountains
- The Depot
- A very diverse community – agriculture, tourism, the arts, business and industry, etc.

Northern Rocky Mountain Economic Development District

- Small, but not too small
- Arts and Culture grown tremendously
- Wonderful restaurants
- The view, our size, arts and culture
- The river
- Nearness to the park
- Designated wilderness areas
- Great climate for entrepreneurs – they choose Livingston
- Keeping of the downtown architecture
- The people – the old timers and the new comers.
- Streetscape – fantastic
- Livingston Chamber
- Tourists love the look of Livingston
- Natural gas, wind energy,
- Rail yard
- Dan Bailey's Fly Shop
- Dog sledding

Education and Workforce

- Wind energy
- Access to rail
- Educated workforce
- Business classes in the school system
- Web based learning
- People here are very resourceful
- BEAR Team – Business Expansion and Retention
- Closeness to Bozeman and MSU –access to resources.
- Great opportunities to conduct structured on-the-job training
- Adult Education program – offer pc classes, etc. Very active, very strong.
- School system is top notch.
- City's internship program.
- Sports program
- Performing arts groups
- State of the Art track and field in the works
- Big offerings for a small school district – do a lot with what we have.
- Coordinate with city and school efforts – in good communication
- 1500 students

Northern Rocky Mountain Economic Development District

- Park County Community Foundation – brings groups together
- Online programs offered by MSU
- Streamline bus system that travels one route per day to MSU from Livingston
- School bond issues never been turned down.
- Food pantry – building and expanding the program.
- Re-use of school buildings.

COMMISSIONERS, NRMEDD, PROSPERA

- Two theaters, art galleries, writers
- Things are starting to happen here.
- Our students can go anywhere in the world.
- Great city manager, great department heads; people work hard and lean.
- Utilize technology before decisions are made.
- Strive to be transparent.
- Great relationship with Prospera.
- Prospera Revolving Loan Fund

DOWNTOWN

- Great location
- Railroad is a great asset.
- BID URA – great to have some funds to work with.
- Walkable downtown
- The people of Livingston – especially the people of downtown Livingston as they are personally and professionally invested.
- Coffee shops add vitality and friendly quality to our community.
- Vision Livingston striving to bring groups together.

NONPROFITS

- Intact community – we have a center, a functional downtown, not spread out like Bozeman.
- **Abundance of services in Park County – health care, youth, pantry, -- program for almost everything and everyone if they are interested.**
- **It is a “where you want to be” kind of place.**
- Eclectic community – great depth of skills.
- Best place to network.
- Generous giving people live here.
- Great people – but also have some negative people.
- Soup kitchen and community garden

- Soccer Association, Baseball Association

HEALTHCARE

- Good solid practitioners.
- Community Health Partners
- Medical, dental education programs – excellent model
- Can do attitude of the people here
- Great attributes to attract professionals here
- Local hospital
- Good working knowledge of each other
- Location – close to interstate and can access specialty care in Bozeman and Billings.
- Diversity and variety of healthcare services here.
- Can recruit quality healthcare professionals here.
- Ditto collaborative relationships
- Also collaborate with smaller communities such as Big Timber and White Sulpher Springs
- Positive community
- Hospital is largest employer in Park County
- Workout opportunities in the area

ECONOMIC DEVELOPMENT RECRUITMENT

- City government
- Quality of life
- Infrastructure is good for a town our size
- Workforce
- Strong commitment from a core group of leaders
- Rail yard – potential
- Ditto all of the above.
- Housing stock is good
- Near to Yellowstone National Park
- Good government here
- Inviting quality of life
- BEAR Business Expansion and Retention Program
- Good health care
- Livingston Farmer's Market

Northern Rocky Mountain Economic Development District

- Western Sustainability Exchange
- Very unique place that we live – people care to make it special
- Farm and ranch heritage
- Tourism, activities, hunting, fishing, park
- Great community feel
- Montana has a good small business survival rate compared to other states.
- Poetry in the Windows
- Off grade rail crossing in progress

AGRICULTURE, ENTREPRENEURS, SMALL BUSINESS

- Access to internet, airport, high speed communications
- Ditto all of the above
- Decided to have my business here because of closeness to Yellowstone Park.
- Buy local ingredients for restaurant
- Sign of a successful rancher is having a wife that works in town.
- Scenery, outdoor activities
- Size of our town – not too small, not too big
- Arts and Culture
- Ability to make change in a small community is quicker.
- Tons of resources and opportunities here.
- Summer youth program strives to schedule summer youth events
- Have an outdoor pool
- Civic Center
- Small town with people that look out for each other

LIVINGSTON RESOURCE TEAM ASSESSMENT - CHALLENGES

APRIL 11 – 12, 2012

WHAT ARE THE MAJOR PROBLEMS AND CHALLENGES IN LIVINGSTON?

The Arts and Culture

- Capture the people coming through.

- Failure to let people know what exists here: theaters, museums, art galleries
- Communication among groups in town
- The wind!
- Empty hotels in the winter; full in the summer.
- **Coordination between retail and art, i.e. – hold art walks then the stores are not open.**
- Ditto
- Better promotion, especially regarding the historic downtown aspects of Livingston.
- Resistance to promoting Livingston; polarized community.
- Very small middle class.
- Cost of doing business is high in Livingston – high water, sewer, business rates.
- Need to better promote our tourism attractions.
- Had a development organization; need to rebuild trust.
- Too many war paths – the pie is only so big; lack of partnerships and pulling together.
- Livingston doesn't sell itself as a whole.
- No "mapping" for our community – if someone pulls off, there is no further direction of where to go, RV parking, etc.
- We do not use Cooke City as an asset.
- Have not publicized ourselves as a theater town.
- Some competition with Bozeman for tourism dollars.
- Concern for retail when new water pipes go in and block traffic.

Tourism

- Rail yard law suit to clean up rail yard
- Lack of better accommodations – need better hotels
- Some people are anti-tourism, especially when large events come to town, i.e., 4th of July
- Ditto
- **How do we grow and keep the unique character of Livingston?**
- Get everyone to work together to keep tourists here.
- Providing more parking without hurting the historic aspects – provide shuttles?
- Parking problems – ditto
- Need more public transportation, including improved taxi services
- Keeping tourists in town
- Shops that do not stay open in evening hours
- Need more lodging
- **Keeping youth here is a challenge – they need more opportunities**

- **Transportation – we have people that come on a bus to see Yellowstone – no bus to run from Livingston to the Park. \$80 by taxi one way.**
- Better communication from the city to activities that would affect downtown businesses.
- Difficult to keep workers – even with benefits.

Education and Workforce

- Low paying jobs – minimum wage jobs, seasonal jobs
- People seem to have lots of education or little education – seems to be a big education gap.
- Closeness to Bozeman – a challenge and a strength
- Limited vocational or technical classes here
- People do not know how to sell themselves – we have highly educated people in Livingston, but they do not sell themselves.
- Create opportunities for when our kids want to come back to Livingston – that livable wage jobs will be here.
- Many employees (young and not-so-young) do not have good work skills – need interpersonal skills in the high school level.
- Business climate survey indicated poor workforce ethics is a big issue.
- Our viability is based on student population – when enrollment goes down, funding goes down. Robust curriculum is at risk should enrollment go down.

COMMISSIONERS, NRMEDD, PROSPERA

- Encourage high school students to finish high school and go on from there, whether in a trade or degree program.
- Trained workforce.
- Improve communication with the people of Livingston; at times, costs/taxes simply must go up. If not now, when?
- People are discouraged about the political process overall.
- Do not have an economic development department.
- Fight for dollars among Livingston's nonprofits.
- Annexation issues

DOWNTOWN

- Signage, i.e., Original Gateway to Yellowstone National Park, Business Corridor signs

Northern Rocky Mountain Economic Development District

- More research on signage – from MDOT – Livingston isn't represented, but rather Butte, when leaving Billings.
- Need to work as a more cohesive community.
- Getting new faces in the mix to drive our goals and objectives forward – how to prevent burnout.

NONPROFITS

- The negative people seem to have a loud voice.
- Generational poverty – not unique to Livingston
- Mental health care – needs not met.
- Poor people need transportation – lots of decisions are made without thinking about this – from adults to children.
- Philanthropy has been tough the last few years mostly due to the national economy, but felt locally as well.
- If look at all of Park County, we are hindered in getting state money – do too well to qualify for funds. Good and bad problem.
- Nonprofits coordinate well, but not so great when involving adult services funded by private dollars.
- Need to be more parent friendly – scheduling to accommodate for working parents, i.e., parent teacher conferences.
- Level of need that is not being met – Livingston lacks capacity to meet some needs.
- Do not have many corporations to request funds from.
- More volunteers needed. Those currently volunteering don't have the time to add more.

HEALTHCARE

- Lacking a pediatrician here – gap in care.
- School enrollment is tending to decline; population is aging.
- Ditto pediatrician need.
- Higher than the average uncollectable claims.
- Hospital built in 1940's – it is "tired." People associate "old building" with lack of quality care.
- Dealing with flood plain issues, funding, to build new hospital.
- Work hard to bring specialty care – but sometimes demographics do not support it even on a monthly visiting basis.
- If new hospital is built, provide transportation to the new location.

ECONOMIC DEVELOPMENT RECRUITMENT

Northern Rocky Mountain Economic Development District

- Depressed real estate
- People struggle to make a living here.
- Finding quality employees – and non-seasonal workers
- Skills gaps – technical as well as life skills gaps
- Lack of pride in the community; lack of confidence
- Service pay jobs – household income is low
- Clean up of rail yard
- Sometimes hard to find a location for a business to land itself
- Who are we – Rail? Art? Recreation?
- Businesses often reluctant to seek assistance – then it is too late.
- Access to supply chain is challenging at times.
- Do have good collaboration – but not consistent.
- Inconsistent access to internet
- Diversity of people- when come together behavior becomes more adversarial; but can work and get the job done.
- Limited resources to deal with the bigger issue – we are a small local government and no one has the time or expertise to pull together resources to recruit or respond to businesses interested in Livingston.
- Resistance to change

AGRICULTURE, ENTREPRENEURS, SMALL BUSINESS

- We are close to Bozeman – is a strength and a challenge. Do not want to become a bedroom community.
- More diversity of local businesses.
- Negative association with rail yard and clean up.
- Perception that the education system here is not progressive.
- Ditto all of the above.
- Rail yard – is a strength, is a challenge, is a project – an answer to all three questions today.
- Montana’s refusal for tip credit for minimum wage employees.
- Seasonality – consistent business levels.
- Unsupervised children after school hours and in the summer

LIVINGSTON RESOURCE TEAM ASSESSMENT - PROJECTS

APRIL 11 – 12, 2012

What projects would you like to see accomplished in Livingston in the next two, five, ten, and twenty years?

The Arts and Culture

- Get people off the interstate to come in; they are driving right by us!
- Make the holes in the net smaller so people will stop.
- **The wind blew you in: now stay!**
- Convention center
- How do we better serve the tourists?
- Collaborate with Cooke City to improve winter tourism.
- Utilize the people from Bozeman – pull them in from over the hill.
- Bus service from Bozeman to Livingston for special events or tourism
- Infrastructure – where do we want to go with the infrastructure we have? Hotels?
- Passenger Train Service
- More outdoor art projects
- Use historic preservation as the basis of tourism
- More trees to break up flat open spaces.
- Organize museums between Billings and Cardwell with a brochure to encourage people to stop.
- Promote as a destination city –
- Sign on both ends of town that designate the business route.
- Receive more Travel Montana funds.
- Bring rail from Havre, Great Falls, Helena, Livingston as a way to get to Yellowstone Park.
- Promote Livingston as a ski area.....26 miles from Bridger.
- Get involved with things already established and proven successful, i.e., Main Street USA, Montana Tourism Association, Yellowstone Country Tourism
- City started over a decade ago replacing water/sewer lines...reach downtown soon. Massive project. Will involve new curbs, and sidewalks, new cast iron streetlights.

Tourism

Northern Rocky Mountain Economic Development District

- Need the groups in town to come together; starting a branding project through the Livingston Chamber.
- Better signage – for parking,
- Ways to keep our youth here
- Recruit more bus tours here – encourage them to stop downtown
- Build packages with Yellowstone Park businesses
- Re-invigorate Main Street
- Seek grants and funding to support the entire area
- We have the location, need cooperation amongst us.
- Realize the new avenues – businesses need to learn to adapt to the new technology and new marketing.
- Good chamber membership but people are busy with family and running their business.
- Across from Depot – use land for a rest area
- RV parking near Depot
- Contact station similar to West Yellowstone – have chamber co-housed with a similar opportunity.
- Capitalize on the tournaments that come to town.

Education and Workforce

- Build a community college in Livingston
- Working to be more inclusive of home schoolers – currently active in improving communications.
- Continue city beautification – inviting, nice parks, dining, appearance, etc.
- City, county and school district – need to work on what we have and make them better. Pool resources together.
- Extend and strengthen partnership with MSU to make sure people are trained and educated for future needs.
- Gallatin College program is open to working with Livingston – the college is expanding now, so seize the opportunity.
- Work with Gallatin College for workforce needs.
- Manufacturing or utilization of wind energy, i.e., repairing wind turbines.
- More opportunities for kids not going to college.

COMMISSIONERS, NRMEDD, PROSPERA

Northern Rocky Mountain Economic Development District

- Economic development efforts strengthened.
- Increase our base - More Printing for Less type businesses.
- Build and improve relationship between Park County and the City of Livingston.
- Support for Local Option Sales Tax in Montana

DOWNTOWN

- Develop the upstairs level of many of our buildings.
- Promote this is a walkable community
- Improve signage “mapping”
- Making Livingston a destination – get off the interstate.
- Lobbying to be Montana Cowboy Hall of Fame location.
- Beatification and overall branding to extend the main street look throughout Livingston.
- Continue implementing downtown revitalization plan – but speed up the process!
- Continue curb and gutter upgrades.

NONPROFITS

- Find funds to pay volunteers.
- Plug in and engage people that are not yet engaged.
- Cultivate leadership development.
- Recycling – create incentives to recycle
- Capital campaign underway for a new food pantry - will contain a commercial kitchen for entrepreneurs. Will engage people from Gallatin College as well for food management, culinary arts, etc.
- Community pool
- Get more people to work like the nonprofits – work with nothing and create tremendous good.

HEALTHCARE

- Build a new hospital; provide improved onsite and more aesthetic surroundings.
- Provide better access for those that severely need health care but are not able to receive it.
- Literacy problems addressed.
- Ditto need for new hospital.
- Ditto need for new hospital.
- Shared electronic community medical records
- Mental Health needs addressed
- Ditto new hospital; excited for the benefits that would be available to the community. **New opportunity to utilize empty hospital building once new one is built. Perhaps assisted living?**

ECONOMIC DEVELOPMENT RECRUITMENT

- Food pantry and the commercial kitchen plus training program
- Goal: Create 50 jobs that pay more than \$15 per hour – would have huge impact.
- Support the city in taking a lead role in economic development.
- Fill the work skills gap, i.e., life skills and computer skills; bring training to Livingston
- Warehouse of resources for someone to learn about how to start a business
- Collaborate on the existing business surveys to determine what would work here.
- Film making
- Green and clean energy jobs
- Light manufacturing jobs

AGRICULTURE, ENTREPRENEURS, SMALL BUSINESS

- Continue work on Livingston Growth Policy
- Work harder with all groups pulling together – Gallery Association, City, Chamber, etc.
- Towns that don't grow – die. Keep us growing.
- Railroad Yard and Preservation of historic buildings – turn into economic development
- Facility for swimming pool in winter
- Indoor skatepark
- Produce what we need for this town to produce local products
- Improve our trail system
- Energy production and energy conservation job opportunities
- Provide activities for kids after school that don't have anywhere to go
- An indoor pool
- Ditto – but we need the money to pay for a pool
- Capitalize more on tourism
- Sustainable energy – green jobs
- Tech school to teach trades
- Bike path to Livingston, Yellowstone Park – no car needed.

Appendix E: MEDA Report Belgrade

RESOURCE TEAM ASSESSMENT REPORT

For

BELGRADE, MONTANA

March 7 – 8, 2012

In Partnership with: Northern Rocky Mountain Economic Development District, Belgrade Chamber of Commerce, City of Belgrade, Gallatin County, Triple Divide Consulting, Eureka Rural Development Partners, NorthWestern Energy, Big Sky Economic Development Authority, Montana Department of Commerce, Montana Economic Developers Association and the people of Belgrade.

INTRODUCTION

It was a privilege for the Belgrade Resource Team to spend two days in your community. Thank you for your hospitality, your time, and for sharing with the team the vision you have for Belgrade.

Before digging in to the report itself, I would like to thank Montana Department of Commerce (MDOC) for its support of the Montana Economic Developers Association (MEDA). It is a partnership between MDOC and MEDA that makes Resource Team projects available across the state.

Special thanks are due to Debe Youngberg, Belgrade Chamber of Commerce. Debe served as the champion behind this entire project and will continue to be involved with the project through activities detailed in this report. Debe had help from other people, agencies and businesses, but without her “Let’s do it” energy, the assessment would not have taken place.

In addition, I applaud each and every team member that dedicated hours of work and travel in order to participate on the team: Dick King, Triple Divide Consulting; Mel Kotur, Community Relations Manager, NorthWestern Energy; Dianne Lehm, Community Development Specialist, Big Sky EDA; Fran Viereck, Retired Program Manager, Montana Department of Commerce; and Tracy McIntyre, Executive Director, Eureka Rural Development Partners.

Each team member’s contact information is provided in the following report. Please feel free to call on any of us for additional information or support. It would be our pleasure!

The stage is now set for the future of Belgrade. There are a number of short term and long term accomplishable recommendations that the resource team has provided in this report. Each of you individually must decide what it is that you want to do—what kind of project you want to tackle. It is also important for the entire community to be involved in finding ways to accomplish its goals. A few celebrations at the successful conclusion of an activity that has involved a large number of citizens will lead to a feeling of accomplishment that will carry over into other activities. Look through the suggestions, pick out one, and get started. It can be done. It is your choice, your decision; you can do it!

Gloria O’Rourke
Team Coordinator, MEDA

PROCESS FOR DEVELOPMENT OF THIS REPORT

According to Montana Department of Commerce program requirements, Resource Team Assessments are to be approved through the community's Certified Regional Development Corporation (CRDC). As a CRDC for Gallatin County was recently formed, the board of Montana Economic Developers Association (MEDA) approved the project. The Belgrade Chamber of Commerce, Gallatin County and the Northern Rocky Mountain Economic Development District served as the *local* Resource Team coordinators for the project. Montana Economic Developers Association (MEDA) provided staff support for the coordination of a resource team to assist Belgrade in evaluating its assets and challenges and in developing suggestions for improving the environment, social and economic future of the area.

Debe Youngberg, Belgrade Chamber of Commerce, served as the local contact and local team leader for the project. Under her direction, an agenda was developed, logistics arranged, as well as budgeting and publicity for the assessment. Resource team members were selected to visit, interview citizens, businesses and community leaders to develop options for projects for Belgrade. The team members were carefully selected based on their fields of expertise that local officials indicated would be needed to respond to the problem or project areas identified.

The Resource Team interviewed and received written comments from over 75 people during March 7 – 8, 2012. All notes from all listening sessions as well as those submitted via email or handwritten are included in this report. The team was available for listening to the following groups: City Government/Services including City, Council Members, Police and Central Valley Fire; Education including Local Schools, Colleges, Training Programs; Civic Leaders including Churches, Non-Profits, Private Citizens; Belgrade Chamber including Retail and Service; Agriculture Businesses/Farmers & Ranchers; Medical Providers and Support Business; Transportation/Infrastructure including Airport, Rail, Streets, Utilities; Senior Citizens; and Manufacturing and Industrial.

Each participant was asked to respond to three questions designed to begin communication and discussion and to serve as a basis for developing recommendations in this report. The three questions were:


- What do you think are the major strengths and assets in your community?
- What do you think are the major problems and challenges in your community?
- What projects would you like to see completed in two, five, ten and twenty years in your community?

Upon completion of the interviews, the team met in a work session to compare notes and share comments. The team then agreed that each team member would carefully analyze the things said, synthesize what they heard with their knowledge of programs and resources, prepare their notes and suggestions, and forward these items to be combined into this final report to the people of Belgrade.

A preliminary oral report and a summary of group recommendations were presented to the people of Belgrade the evening of March 8th.

Northern Rocky Mountain Economic Development District

Following the oral report, this formal written report was prepared and is presented to the people of Belgrade. Copies will be made available in print and electronically. The report is available on the MEDA website at <http://www.medamembers.org/resourceteams.html> A Town Hall Meeting is planned for Monday, May 14th, 7:00pm. The purpose of the meeting will be to briefly review the report, identify projects and set priorities for action.

<p>BELGRADE RESOURCE TEAM ASSESSMENT</p> <p>BELGRADE, MONTANA</p> <p>March 7- 8, 2012</p>	
<p>Dick King</p> <p>Triple Divide Consulting</p> <p>409 W. Artemos Dr.</p> <p>Missoula, MT 59803</p> <p>Ph: (406) 880-0720</p>	<p>Mel Kotur, Mgr Community Relations</p> <p>NorthWestern Energy Co.</p> <p>121 East Griffin Dr.</p> <p>Bozeman, MT 59771</p> <p>Ph: (406) 582-4637x77537</p>
<p>Dianne Lehm, Community Dev Specialist</p> <p>Big Sky EDA</p> <p>222 North 32nd Street, Suite 200</p> <p>Billings, MT 59101</p> <p>Ph: 406 256-6871, ext. 119</p> <p>Email: dianne@bigskyeda.org</p>	<p>McIntyre, Tracy Executive Director</p> <p>Eureka Rural Development Partners</p> <p>P.O. Box 1951</p> <p>Eureka, MT 59917</p> <p>Ph: (406) 297-7374</p> <p>Email: tracy@eurekardp.net</p>
<p>Fran Viereck</p> <p>1709 Eighth Ave.</p> <p>Helena, MT 59601-4644</p> <p>Ph: 406.443.1924</p> <p>Email: sojamawi@gmail.com</p>	<p>Gloria O'Rourke, Team Assistant</p> <p>Montana Economic Developers Association</p> <p>118 E. Seventh St.; Suite 2A</p> <p>Anaconda, MT 59711</p> <p>Ph: 406.563.5259 Fx: 406.563.5476</p> <p>gloria@medamembers.org</p> <p>http://www.medamembers.org</p>



BELGRADE RESOURCE TEAM ASSESSMENT

March 7th

- Noon **Lunch** with Chamber Economic Development Committee

- 1pm -2:30pm **Community Tour**

- 2:45pm-4pm **City Government/Services = City, Council Members, Police and Central Valley Fire**

- 4:05-5:30pm **Education = Local Schools, Colleges, Training Programs**

- 5:35-7pm **Civic Leaders = Churches, Non-Profits, Private Citizens**

- Dinner **Rio Sabinas**

March 8th

- 7:00-9am **Breakfast @Belgrade Chamber Retail/Service**

- 9:05-10am **Agriculture Businesses/Farmers & Ranchers**

- 10:05-11am **Medical Providers /Support Business**

11:05- Noon Transportation/Infrastructure- (Airport, Rail, Streets, Utilities)

Noon- 1:15pm Lunch with Senior Center Senior needs

1:30-2:30 Manufacturing/Industrial

2:30 – 5:30 Team Work Session - Dinner-Food Brought In

7pm Public Meeting- City Hall, 91 E. Central

BELGRADE, MONTANA

MAIN TOPIC LIST

BELGRADE RESOURCE TEAM ASSESSMENT

March 7 – 8, 2012

The following list is a summary of main topics and issues that result from the Belgrade Resource Team listening to the communities address strengths, challenges and their vision for the community of Belgrade. This list serves as the outline for the Resource Team Assessment Report which will be available the last week of April. There will be a Belgrade Town Meeting held the evening of May 14th to identify and prioritize projects.

MAIN TOPIC: BUSINESS DEVELOPMENT

ISSUES:

Northern Rocky Mountain Economic Development District

- ✦ Add value to ag products – process and ship from Belgrade
- ✦ Consider tools
 - Inter-Modal Facility
 - Financial tools such as Tax Increment Finance Districts
 - Cooperatives
- ✦ Build on excellent start-up base that already exists - Market what you have
- ✦ Be pro-active to influence development decisions
- ✦ Downtown revitalization plan
 - Marketing
 - Cohesion
 - What do we want to look like in the future?
- ✦ Broadband Redundancy – be ready for huge data load needs
- ✦ Expand retail – compliment what already exists
- ✦ Use access and market to airport

MAIN TOPIC: FAMILY ORIENTED COMMUNITY

ISSUE:

- ✦ Support the Chamber in creating more family events.
- ✦ Bike/Pedestrian paths
- ✦ Continue building interior activity options i.e., indoor soccer with splash park.
- ✦ Celebrate Belgrade's successes!
- ✦ Family restaurants
- ✦ Off-hour child care/sick child care

MAIN TOPIC: ACCESS AND TRANSPORTATION

ISSUE:

- ✦ Transportation such as rail/airport divides the community.
- ✦ Use what you have to advantage – maximize transport modules such as air, rail, trucking, interstate...
- ✦ Mitigation plan needed to prepare for increased train traffic
- ✦ Interchange
 - Ease city traffic
 - Access for 2nd industrial park
 - Improve entry way corridor
 - New marketing opportunity to showcase Belgrade

MAIN TOPIC: IMMEDIATE TRAFFIC CONTROL

ISSUE:

- ✦ Madison and Broadway four-way stop
 - Plan now – more growth is coming
 - Explore creative options – Roundabout? Loop?
 - Educate/Engage/Participate with TPCC - Chamber has in the past

MAIN TOPIC: HOUSING

ISSUES:

- ✦ Prepare for more growth
- ✦ Manufactured homes and trailer cooperatives
- ✦ Beautification
- ✦ Pride of ownership

MAIN TOPIC: INFRASTRUCTURE

ISSUES:

- ✦ Curbs, sidewalks, gutters, paved streets – not easy. Sidewalks nice – but may have other priorities/alternatives, i.e. asphalt path.
- ✦ Options –
 - Special Improvement District – explore costs
 - Walkway/Bikeway – consider separating from streets – away from shoulder, own path.
 - Capital Improvement Plan and Preliminary Engineering Report
 - Finance infrastructure to Bruce Industrial Park

MAIN TOPIC: YOUTH AND SENIORS

ISSUES: YOUTH

- ✦ Identify actual needs
 - Mixed messages, i.e. “nothing to do” vs – too busy
 - Skateboard park
 - Youth amenities – family oriented options
 - Expand entrepreneur classes

ISSUES: SENIORS

- ✦ Expand Senior Center
- ✦ Elderly housing mix

MAIN TOPIC: IDENTITY – EMPOWER BELGRADE

ISSUES:

- ✦ Beautification
- ✦ Replace welcome signs
- ✦ Celebrate success
- ✦ Build on strengths – Splash Park, Fall Festival
- ✦ Branding – Determine who are we? What is our image? What do we offer?

MAIN TOPIC: CONNECT BELGRADE

ISSUES:

- ✦ All organization meeting – understand what each is doing
- ✦ Volunteer development – great crew in place but expand it
- ✦ Cohesion before new development i.e., Jackrabbit and Main Street
- ✦ Connect River Rock, Landmark, Cobblestone
- ✦ Put a team together – approach Bozeman Deaconess to begin work on Health Center

BELGRADE RESOURCE TEAM REPORTS

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MAIN TOPIC: BUSINESS DEVELOPMENT

ISSUE: Add Value to Agricultural Products

Belgrade and the surrounding rural area (Central Valley) have a lot to offer for business development. The area's economy has historically been based on agriculture and Belgrade has become a center for ag-related firms doing business in the Gallatin Valley and southwest Montana. Many residents told the Assessment Team that adding value to agricultural products is an opportunity that the community needs to exploit. This is a common theme in many Montana communities, and there are some examples that demonstrate the economic feasibility of processing agricultural products (i.e., Great Falls is developing a "value-added" industrial park devoted to processing of area farms and ranches).

Recommendations:

Although adding value to agricultural products is a proven means of strengthening the local economy and creating jobs, there are many challenges that have to be overcome for such an effort to succeed. These include the capital cost of establishing processing facilities, the distance of major markets, and competition from large firms that currently service these markets at prices that can make local value-added products unprofitable. To be successful, local firms need to identify market opportunities before investors will become interested. Developing local markets for locally produced agricultural products can help small companies become successful

and build the expertise needed to expand into regions with greater population bases. Belgrade should continue to encourage its local farmers' market and work with MSU to increase the university's purchase of local food supplies. A local commercial kitchen would be a big help to small value-added producers that are seeking to serve local and regional markets, such as the Bozeman Food Co-Op. If Belgrade determines that development value-added agriculture is a priority for the community, this strategy merits support from the economic development district that is currently in the process of preparing its Comprehensive Economic Development Strategy for Gallatin and Park Counties.

Recommended Resources:

- The Montana Cooperative Development Center, Brian Gion, 406.727.1517
- Montana Board of Investments Value-Added Loan Program
- USDA Rural Development (Rural Business Enterprise Grant Program for feasibility studies and business plans, and Business and Industry Loan Guarantee Program)
- Montana Department of Commerce (Big Sky Economic Development Trust Program for planning grants) Debi Davidson, 406.841.2792

ISSUE: Develop Resources to Assist Business Start-up and Growth

Belgrade has already established itself as a good place to start and grow a business. The community has a large industrial park that is home to a wide variety of firms including Bacterin International Holdings, a developer of anti-infective coatings for medical applications and revolutionary bone graft material. The company is a successful spin-off from research at MSU and employs 180 workers. Almost one section in size (nearly 640 acres), Bruce Industrial Park is also home to several small manufacturing firms that have developed business to business relationships with other firms in the park, creating a supportive environment for entrepreneurs. Bruce Industrial Park is unique—there is no other similar facility in the County.

Local business owners also benefit from a very supportive relationship with the City of Belgrade. Permit applications are handled efficiently and the City has a revolving loan fund that has helped several companies meet their capital needs.

Recommendations:

The City of Belgrade is to be commended for its commitment to helping local businesses. The community should develop a marketing plan that highlights its success as a great place to locate a business. The City's proximity to the regional airport, now called Bozeman Yellowstone International Airport, is an opportunity that needs to be realized. The pending I-90 interchange will solve many transportation problems in the area and establishment of a second industrial park on land adjacent to the interchange would enhance the community's image as a great place to do business. In the near term, however, the City needs to develop a strategy for providing water and sewer service to the Bruce Industrial Park.

Recommended Resources:

- Montana Board of Investments Infrastructure Loan Program (source of financing for extension of City water and service to Bruce Industrial Park)
- Montana Big Sky Economic Development Trust Fund (for help with developing a marketing plan for the City) Debi Davidson, 406.841.2792

ISSUE: Market What the Community Has and Be Pro-Active

Belgrade has a great story to tell. It is great place for entrepreneurs and businesses looking to grow. The Bruce Industrial Park is a good example of the community's positive working relationship with businesses.

Recommendations:

Under the umbrella of the local Chamber of Commerce, the community could establish a business recruitment and assistance team. This team, consisting of businesses owners, entrepreneurs, and representatives of the City and the Economic Development District, would develop marketing information, interview local businesses, and identify priorities (i.e., improvements to the existing industrial park, establishment of a second business park as part of the I-90 Interchange project). The team could also renew the community's efforts to persuade Bozeman Deaconess Hospital to accelerate its timeline for construction of the new care center. The land has been purchased and the necessary infrastructure is in place. Reducing the need for Belgrade residents to travel to Bozeman for basic health care needs would increase the community's cohesiveness.

Recommended Resources:

- Montana Business Expansion and Attraction Program (BEAR) 406.563.5259
- Montana Small Business Development Center (SBDC)
- Montana Facility Finance Authority (care center)
- USDA Rural Development Community Facility Program (direct and guaranteed loans and grants—care center)

ISSUE: Downtown Revitalization and Expand Retail Options

Several participants in the assessment process pointed to the need to improve Belgrade’s image, beautify the community, reduce vacancy in the historic downtown core, increase activity options for youth, and, in general, make the community more inviting to visitors, which would also encourage residents to spend more time in the community. They also stressed the need to increase local retail options, especially a box store that would reduce the need to drive to Bozeman to shop for basic needs, such as children’s clothing.

Recommendations:

In partnership with the City, the Chamber can establish a committee to gather information regarding the infrastructure needs of the downtown core and assess the feasibility of using the downtown business district as the starting point for street, sidewalk and walking/bicycle path improvements. A new Holiday Inn Express will be constructed near the downtown core on land currently owned by Town Pump. This project will increase Belgrade’s ability to attract meetings and other activities that need a conference center (the project will include a conference facility that can accommodate 150). The City and Chamber need to maintain close contact with the land owner and the developer to make sure that the project is moving forward. Another need is to gather information regarding the buildings in the downtown core (date of construction, historic significance, current condition, ownership, taxable value, current occupancy), which would be used to evaluate the potential of establishing a downtown revitalization program. This effort could also include an analysis to determine the area’s eligibility for the New Markets Tax Credit Program.

Recommended Resources:

- Montana Main Street Program
- Tax Increment Financing District
- Montana Historic Preservation Office and Historic Tax Credit Program

ISSUE: Use Proximity to Airport to Promote the Community

The Bozeman Yellowstone International Airport, which is located adjacent to the City of Belgrade, is the second busiest airport in Montana. Five carriers provide service to Chicago, Denver, Minneapolis, Oakland, Phoenix, Seattle and Las Vegas. And, the airport will soon provide service to New York/Newark and Portland.

Recommendations:

The proximity of the regional airport to Belgrade provides a great opportunity to market the community to visitors and increase awareness of the community's positive business climate and high quality of life. A key to realizing this opportunity will be the new interchange that will connect the airport to I-90. Belgrade could develop a second business park that would be accessed by the new interchange and also needs to consider signage that encourages visitors to spend time in the community. In this regard, the community's interest in revitalizing the downtown and beautifying the community in general are both steps that will enhance the community's appeal to visitors arriving in the area by air.

Recommended Resources:

- Industrial Tax Increment Financing District (to support infrastructure development at the new industrial park).
- Montana Tourism Infrastructure Grant Program

MAIN TOPIC: FAMILY ORIENTED COMMUNITY

ISSUE: Role of the Chamber

Many participants in the assessment meetings stressed that Belgrade is a family-oriented community and voiced their support for the local Chamber to play a leadership role in developing projects that will further strengthen this aspect of the community.

Recommendations:

The ability of the Chamber to build on the existing strength of the community as a family-friendly environment is dependent on expanding membership and increasing the organization's revenue base. Belgrade is fortunate to have a strong Chamber to build on, and if the community adopts a business expansion and attraction program, the Chamber would be the logical place to house the program. The BEAR program would re-enforce the Chamber's role as the community's leader for improving the overall quality of life. The Chamber should also consider ways to increase the involvement of other organizations in these activities.

Recommended Resources:

Montana BEAR Program, 406.563.5259

Belgrade FFA and FFA alumni association and local non-profits organizations

Central Valley Fire District

ISSUE: Bike and Walking Paths

The success of Splash Park and the interest of many residents in finding other ways to tie their community together were a couple of reasons why many comments focused on the need to develop a system of bicycle and walking paths in Belgrade.

Recommendations:

There is no doubt that a network of trails tying Belgrade together would have many benefits, including encouraging a healthy life style and giving young people options to driving a car to get to activities. A trail system could also be an option to more traditional sidewalks, curbs and gutters, which, though also cited as a need by many, would be costly and increase property taxes. If a system of trails could also include a means of tying the western and eastern sections of the community, the benefits would be tremendous. Many communities that have developed a system of walking and bike trails have had the advantage of starting with abandoned railroad lines. This is not the case in Belgrade, however, so alternatives need to be identified.

Recommended Resources:

Without existing right-of-ways (such as old railroad beds), establishing a trail system is challenging. A starting point, however, would be to map existing corridors that could be used for a trail system, determine existing ownership and right-of-way status, and then to develop a plan to get started. A good source for initial planning is the Community Transportation Enhancement Program, which the City of Belgrade has already used to support several projects in the community.

MAIN TOPIC: ACCESS AND TRANSPORTATION

ISSUE: Railroad and Interstate Split the Community

Belgrade is bifurcated by I-90 and the main line of the Montana Rail Link, dividing the community into two components. Residents of the newer subdivisions west of the transportation corridor have few services available and need to travel to the eastern half of the community for school, recreation and shopping. Many will choose to take the Interstate to Bozeman rather than cross the corridor to Belgrade's service center. The transportation corridor is also a safety hazard for the community.

Recommendations:

Some activities currently taking place in the original community need to be offered to residents of River Rock, Landmark and Cobblestone (i.e., adult education). This area is also home to a large trailer park that may need to close. The community should consider a project to develop low-income housing to ensure that families of all income levels can make Belgrade their home. The development of more family-oriented activities, local retail options, and expanded recreational assets, which are discussed elsewhere in this report, would help overcome the division caused by the transportation corridor.

Recommended Resources:

- Chamber of Commerce (such as Fall Festival)
- Community Transportation Enhancement Program (CTEP)
- USDA Rural Development (low-income housing and community facility loan and grant program)

Issue: Capitalize on Existing Strengths

As noted already, Belgrade has some existing strengths that are examples of the type of projects that can help alleviate the split caused by the transportation corridor created by I-90 and the railroad. The Fall Festival and the Splash Park are two great examples of what can be done. Both are based on community assets (agriculture and quality of life). The community is Gallatin County's center of agriculture and ag-business and is the transportation hub for the county.

Recommendations:

Until the I-90 interchange is completed, it will be difficult for the community to address other transportation-related needs (such as improving the Frontage Road between Bozeman and Belgrade and promoting a north/south grid that would alleviate traffic congestion in the downtown). On a positive note, the community is now eligible to determine how Federal aid funding is allocated. Because traffic congestion in the downtown core is a constant problem, the community should probably concentrate on alleviating that problem as a first priority following final approval of the I-90 interchange.

Recommended Resources:

- Transportation networks are critical to economic prosperity and Belgrade is well situated to become Gallatin County's center for value-added businesses, manufacturing, and processing of local ag products. There are many transportation-related projects that would enhance the community's existing strengths in these areas, but funding will be difficult to find until the interchange project is completed. The community should look into alternative ways to address the congestion in the downtown area, however, as the current situation is unacceptable. The Montana CTEP program is a potential source of funding assistance.

ISSUE: Mitigate Impact of Increased Train Traffic

There is a concern that the demand for coal from Montana and Wyoming in the Far East and the possible development of enhanced port facilities on the West Coast will increase the number of trains on Montana Rail Link's main line, resulting in even more disruptions to traffic flow between the eastern and western sections of Belgrade. Not only would this development further harm the community's efforts to build cohesiveness, it also would increase the potential safety hazard caused by closure of the rail line.

Recommendations:

Although the increase in train traffic caused by the shipment of more coal to the West Coast is not a certainty, it is an issue for many communities where the Rail Link line goes through their town. The concerns expressed by many in Belgrade regarding the impact on their community if MRL ships more coal are legitimate and need to be addressed. There is no easy solution, however. Some communities have dropped the track several feet below ground level to mitigate the impact of train traffic, but at considerable expense. Since Belgrade is not the only community confronted by this potential problem, it makes sense for the community to partner with other communities who would also experience increased train traffic caused by an increase in coal exports from Montana and Wyoming mines.

Recommended Resources:

- Because the problem identified by many in Belgrade will also affect other communities (Livingston, Butte, Drummond, Missoula, and others), and because any solution will be costly, the City should contact the Montana Departments of Commerce and Transportation as well as Montana Rail Link to propose a meeting to discuss this issue. One outcome could be a proposal to the 2013 Legislature for funding of an impact study and mitigation analysis.
- Big Sky Economic Development Trust Fund (planning grant to fund preparation work for meeting of potentially impacted communities, Montana Rail Link, and appropriate state agencies).

ISSUE: Complete the I-90 Interchange

The total estimated local cost share of the I-90 interchange project is \$24 million. The County Planning Office has submitted a TIGER 4 grant application, but local entities will still need to provide about \$7 million. Belgrade's share is \$2 million. Although this financial burden will limit the City's ability to complete other needed infrastructure improvements (i.e., sewer system expansion, walking and bicycle paths, sidewalks and curbs, etc.), the I-90 interchange project is clearly a priority for the community. The project will eliminate the safety hazard for emergency response vehicles that occurs when a train blocks the existing roadway crossings that connect the community.

Recommendations:

The need to complete the I-90 Interchange project was a dominating theme of the Belgrade assessment. Until funding is secured and the project is underway, it will be difficult to undertake other sizable projects that need funding support from public sources. City, airport and County officials have devoted considerable effort to get this key project to the construction phase and it appears that they have fully investigated all possible funding sources. Several good ideas were discussed regarding ways to ensure that the interchange, when complete, will have a positive impact on the economy and quality of life in Belgrade. Because of the vital importance of the project and its impact on financial capacity, the community should investigate the possibility of conducting a planning project to determine the feasibility of these ideas.

Recommended Resources:

- Big Sky Trust Fund
- U.S. Economic Development Administration

MAIN TOPIC: IMMEDIATE TRAFFIC CONTROL

Issue: Develop Methods to Reduce Traffic Congestion

Please see the discussion under the issue “Capitalize on Existing Strengths.”

MAIN TOPIC: INFRASTRUCTURE

ISSUE: Improve Existing Streets and Sidewalks

The eastern section of Belgrade is home to the historic downtown and original residential neighborhood. There is a clear need to improve existing streets and sidewalks and install curbs and gutters. Many participants in the assessment process pointed to this need as a top priority for the community.

Recommendations:

The community’s property tax base would be the primary source of funding for a community street and sidewalk improvement project. Before proceeding, the City needs to update its capital improvement plan by completing a preliminary engineering plan and financial analysis for a street and sidewalk improvement project. It will be important, however, to involve the public in this process.

Recommended Resources:

As soon as possible, the City should budget funding for the preliminary engineering plan and financial analysis. With this information, the City can engage the public and investigate the feasibility of a special improvement district that would finance the street and sidewalk improvement project.

ISSUE: Investigate Feasibility of Special Improvement Districts

Recommendations:

As discussed above, the primary source of funding for capital improvement projects in the community will be property tax assessments, such as SIDs. Given the community's significant commitment to public education, as evidenced by the high quality of grade, middle and high school facilities, it will be important to carefully analyze the community's capacity for additional assessments. This analysis would also produce importance information for the school district. The scope of this analysis should also include an evaluation of the community's existing water and sewer system (capacity to handle growth, condition of existing facilities, and assessment of capacity for potential rate increases).

Recommended Resources:

- City of Belgrade general and street maintenance funds
- School District general funds (for cost sharing with the City)

ISSUE: Finance Infrastructure Improvements to Bruce Industrial Park

Bruce Industrial Park is one of Belgrade's greatest assets. It is home to a wide variety of companies, including several manufacturers. The Park's success gives the community's desire to establish an identity several strong themes: (1) Bring your business to a community that truly cares about your success; (2) Start your business in Belgrade and get the help you need to grow; (3) Belgrade—the heart of the central valley and the place where your business can find the workers it needs to achieve success. Although these themes are legitimate claims, the Industrial Park is without water and sewer systems. This lack of infrastructure is a potential barrier to the Park's continued success, as the cost of installation is viewed by many businesses at the Park as prohibitive.

Recommendations:

The Bruce Industrial Park is unique to the region. No other similar business location opportunity exists in Gallatin County and throughout much of Southwestern Montana. The lack of basic infrastructure systems clouds the future of the Park, however. At some point, public water and sewer systems will need to be installed. To accomplish this without placing an excessive cost burden on the companies who have located at the Park is the challenge.

Recommended Resources:

- Montana Board of Investments Infrastructure Loan Program (user fees offset State income tax liability).
- USDA Rural Development Sewer and Water Loan and Grant Programs

MAIN TOPIC: YOUTH AND SENIORS

ISSUE: Identify Actual Needs of Community's Youth

The Belgrade assessment team heard many comments regarding the lack of activities for the community's youth, especially teen-agers. Young people need to go to Bozeman to see a movie, for example.

Recommendations:

One will hear similar comments regarding the need for more activities for young people in many other communities. This issue is not unique to Belgrade. The community has assets that other communities do not. The public school's sports facilities, for example, are superb. The community is also working to develop new outdoor athletic fields and to capitalize on the popularity of its Splash Park. Several priority projects listed under other issues, such as the need for a family restaurant, would also address the need for youth activities.

Recommended Resources:

With 3,000 students in its public school system, Belgrade is home to a lot of young people. The community has provided strong support to its educational resources and completion of the outdoor athletic fields will provide more opportunities for youth to find activities in their home town. Revitalization of the downtown core, which is discussed on page 3, could also attract businesses that will attract young people.

ISSUE: Expand Senior Citizen Center

Belgrade's existing senior citizen center is inadequate. A plan for expansion of the facility has been developed. The center provides a variety of important services to the community's elderly population and expansion of the existing facility is important.

Recommendations:

The City of Belgrade probably needs to help the management of the senior center secure funding for the expansion of their facility. This assistance could include help with grant and loan applications.

Recommended Resources:

- Montana Community Development Block Grant Program
- USDA Rural Development Community Facility Loan and Grant Program

ISSUE: Shortage of Housing for Elderly Population

The assessment team received several comments regarding Belgrade's need to develop more housing options for its elderly population.

Recommendations:

The possible need for development of additional housing for the elderly should be combined with the effort to develop affordable housing choices for low and moderate income households. The City of Belgrade is probably the most appropriate entity to address these needs. Housing options for the elderly are complicated, ranging from independent living to assisted living to memory care and other long-term care facilities. The community's medical community should be contacted for guidance.

Recommended Resources:

- Montana Facility Finance Authority
 - USDA Rural Development Rural Rental Housing Program
 - Private Elderly Care companies
-

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MAIN TOPIC: FAMILY ORIENTED COMMUNITY

ISSUE: Support the Chamber in creating more family events

All sectors of the Belgrade community expressed their appreciation for the Belgrade Chamber of Commerce and listed the Chamber as one of their most valuable assets. The Belgrade School System was also listed as a vital component of the Belgrade community. Too, the people of Belgrade repeatedly voiced their strong opinion that Belgrade is a family oriented community with young families engaged in the community. Both the Chamber and the School District are seen as major players in providing quality family activities to the community. However, an often stated concern is the need for more opportunities for families to interact in community events and keep neighbors in Belgrade, rather than going elsewhere for family activities.

Recommendations:

Engaged families are the life blood of any community. The Belgrade Chamber of Commerce has a number of very successful family events that encourage community engagement; examples include Farm Fair and Fall Festival. Learn to celebrate these wonderful successes! Comments received during the Community Assessment Interviews indicated that the Belgrade community holds a high regard for

the Belgrade school system and the School District personnel. The following recommendations can help couple some of their strengths in creating more family events:

- First, continue to support your successful programs that already exist.
- Seek out opportunities for the School District and the Chamber to join forces on family events.
- Plan Chamber / School District breakfast or lunch meetings for Chamber members to brainstorm ideas for new family events, a good example is the Bozeman Chamber's Eggs & Issues Program. Appoint a facilitator, record ideas.
- Consider asking the Chamber Board to host a series of work sessions with local non-profit organizations already involved in family activities to seek out opportunities – Big Brothers Big Sisters, 4H Clubs, Scouts, Boys & Girls Club, and YMCA.
- Encourage the Chamber and/or the School District to invite a representative from the Montana Department of Fish, Wildlife and Parks to present, to the Belgrade community, information on their many youth and family programs.
- Belgrade has at least 13 active churches, encourage local churches to notify the community about their family activities that are open to the public.
- Request a Belgrade service club (Lions, Kiwanis, etc.) to organize a community clean-up day that encourages families and community members to “Clean Up Belgrade”. Every spring, clean up local parks, neighborhoods, school playgrounds. Follow up with a community BBQ in the City Park.
- Solicit the School District to circulate a questioner or survey out to the students in grades K-12 to ask what they would like to see for family activities in Belgrade. What have they seen in other communities that they would like to see in Belgrade? Take the survey home and ask for family input.

Recommended Resources:

Investigate these websites for more information and ideas:

<http://fwp.mt.gov/>

http://montana.kiwanisone.org/public_district/index.aspx

http://www.lionsclubs.org/locator/lions/search_form_state.php

<http://montana4h.org/>

ISSUE: Bike / Pedestrian paths

The Belgrade Resource Team heard repeatedly that the City staff and City Council support and embrace Belgrade's children, their interests and their activities. The team also heard that the residents

appreciate the small town atmosphere and that the community doesn't have the traffic problems that larger city experience. Still, we often heard that Belgrade lacks sidewalks, trails and bike paths. As a result, it's difficult for kids to ride their bikes to school, for seniors to walk around town, and for families to exercise on trails and paths.

Recommendations:

Communities that create a system of paths, trails and sidewalks that connect local gathering places like schools, parks, shops, athletic fields, and neighborhoods encourage healthy lifestyles. Walking and biking paths accommodate safe pedestrian and bike travel while providing connectivity around the town and building a sense of community. Consider the following recommendations:

- Seek out the advice of local organizations that are involved in developing trail systems. Groups like the Gallatin Valley Land Trust and Montana Conservation Corps may be able to provide expert advice on how to enhance your trail and bike path system.
- Partner with community groups and civic organizations to gather volunteers that can work to enhance, improve and expand the trail system around town.
- Think about opportunities to present a program to service clubs (Kiwanis, Lions, Exchange Club, etc) to ask for volunteer help with a section of bike path or walking trail. Often these clubs are looking for ways to contribute and volunteer in our communities.
- Develop an Adopt-A-Trail type program to maintain sidewalks, bike paths and trails around the area. Not only does this type of program help to keep your trails in good shape, but it provides for an excellent opportunity for family activities.
- Talk to the Mayor of Three Forks, or their City Council, to find out how they made their very successful new trail system work so well, where they came up with funding to install new trails, who built they trails and how they engaged community volunteers.

Recommended Resources:

Check out these organizations:

Gallatin Valley Land Trust PO Box 7021 Bozeman, MT 59771	Office location: 25 N. Willson, Suite E Bozeman, MT 59715	Phone: (406) 587-8404 Fax: (406) 582-1136 info@gvlt.org
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- Montana Conservation Corps
- 2310 North 7th Ave Unit D, Bozeman, MT 59715
 - Mtcorps.org
 - (406) 586-0151
 - mccbozeman@mtcorps.org

City of Three Forks

206 Main Street

PO Box 187

Three Forks, Montana 59752

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ISSUE: Continue building interior activity options

As part of the discussion revolving around the main topic of Family Oriented Community, community members often recommended more opportunities for indoor family activities. As a result, continuing to pursue building interior activity options included a swimming pool, bowling alley, movie theatre, indoor soccer arena, indoor skate or splash park. The Resource Team realizes that these facilities are often private ventures, and for-profit businesses that require capital and considerable other resources. How can the Belgrade community accommodate indoor family activities? Along these same lines, the need for more family restaurants was often mentioned. There appears to be a lack of opportunities, or at least a limited opportunity, for families to remain in the Belgrade if they want to go out for a family meal – especially breakfast or lunch.

Recommendations:

While the Belgrade community has wonderful athletic fields, a splash park that is wildly successful and good neighborhood parks, the quality and quantity of indoor family recreational opportunities appears to be lacking. Facilities to bowl, swim, see a movie, play pool, roller skate, or enjoy a meal together are lacking in Belgrade. A large part of the value of these facilities lies in the sense of community that they build. They help create a community identity and keep neighbors from traveling to other nearby towns to recreate. Here are a few recommendations to consider:

- The Gallatin Valley YMCA is working on a campaign to build just such a facility. The “Y” envisions a community center with a swimming pool, a gymnasium, classroom space and other recreation opportunities similar to other YMCAs around the country. These YMCA community centers are safe, wholesome places for children and adults to find, or develop, recreational and educational activities. The Belgrade community should consider discussing possibilities with the Gallatin Valley YMCA. The Y is already talking to the City of Bozeman about partnerships.
- Economic Development organizations can often be catalysts for attracting businesses into an area. The Belgrade community should utilize our local economic development corporation, Prospera Business Network, to investigate businesses that

- may be looking for opportunities to invest in Belgrade. Gallatin County, MEDA, Northern Rocky Mountain Economic Development District are all valuable resources.
- Belgrade doesn't need to reinvent the wheel. Look to other cities and towns with successful community centers and seek their advice; how did you go about the process, what were your funding sources, who were your partners, how did you overcome the hurdles are all questions that can be asked of successful communities.
 - Network with other Chambers of Commerce, build relationships through the Montana League of Cities & Towns, engage real estate developers and decision makers in the financial community into the process of developing a community center and restaurants.

Recommended Resources:

Organize a team to contact these resources:

www.gallatinvalleymca.org Gallatin Valley YMCA

www.mlct.org Montana League of Cities & Towns

www.prosperabusinessnetwork.org Prospera Business Network

www.medamembers.org Montana Economic Developers Association

ISSUE: Off-hour child care/ sick child care

A large sector of the Belgrade community is comprised of young, working families, and with this sector comes the obvious need for child care - at all hours of the day. Child care at off-hours and child care for sick children appears to be lacking according to the feedback that the Resource Team received from the Belgrade community. What can be done to accommodate the need for child care at odd hours and for sick children?

Recommendations:

A helpful first step would be for the Belgrade community to clearly determine what the need is for child care, conduct a sort of Needs Assessment. From this effort you can expect to determine where the gaps exist, what child care needs are not being met, what is being done well and what is not being provided, or provided poorly.

Develop a tool to assess working mothers and fathers of their child care needs, determine what happens to sick children when their parents go to work, and define what hours are important for

quality child care. A simple survey conducted through the area churches, through the school's PTA program, and at family events (a booth at Fall Festival).

Once the community knows what is lacking and what is important in Belgrade's child care system, utilize the many experts at Montana State University for advice. MSU's Department of Health and Human Development has a major focus of study on early childhood education and child services enhancing the development, education and well-being of young children and their families. Take advantage of this fantastic local resource and partner with MSU's HHD Department to chart a course for safe, available, affordable child care in Belgrade.

Recommended Resources:

Health & Human Development

Montana State University
P.O.Box173540
Bozeman, MT 59717-3540 Tel: (406) 994-3242 Fax: (406) 994-2013
Location: 218 Herrick Hall

REPORT BY: DIANNE LEHM

Community Dev Specialist

Big Sky EDA

222 North 32nd Street, Suite 200

Billings, MT 59101

Ph: 406 256-6871, ext. 119

Email: dianne@bigskyeda.org

<http://www.bigskyeda.org>

MAIN TOPIC: BUSINESS DEVELOPMENT

ISSUE: Value-added Ag products

Recommendations:

Belgrade residents expressed a desire to capitalize on the local agricultural market. To assist current and expanding businesses, new business, and inventors the resources of the Montana Manufacturing Extension Center (MMEC) would be an avenue to explore. The engineers that work with businesses through this organization provide expertise on the ins and outs of LEAN manufacturing, the patent process, and moving a business idea to reality. The MMEC field staff work with businesses to improve business processes, increase sales and reduce costs, improve product quality, productivity, and competitiveness in today economy.

Existing businesses will benefit from the Montana Procurement Technical Assistance Centers located around the State of Montana. Sub-center staff works with businesses to learn what it takes to do business with the government, what's required, how to be competitive, and how to find and understand the opportunities in your market. Staff will work with the business through the bid and proposal processes, and follow the client through the pre and post award requirements.

Business Expansion And Retention (BEAR) Program is a statewide program that assists businesses evaluate its individual strengths and needs to best determine how to take the business to the next level. This program utilizes experts in many business fields from strategic planning, financial, marketing, LEAN processes, and more to work with the business to grow and prosper.

Working through this program may also open the door to State grant dollars available for incumbent worker training (IWT). The incumbent worker training program provides eligible businesses with up to \$2,000 per employee for training to move employees up through the business. **The Incumbent Worker Training (IWT)** program can provide funding for job training for employees of small businesses. The employer must apply for an IWT grant through one of three organizations that will assess eligibility and need. Those organizations are the Business Expansion and Retention teams sponsored by the Montana Economic Developers Association, the Montana Manufacturing Extension Center at MSU Bozeman, and the Small Business Development Centers.

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The Growth Through Agriculture (GTA) Program provides grants and loans for value added agricultural products projects. Some of the eligible activities under this program include equipment purchases, promotion, feasibility studies, engineering costs, and some educational business activities. In selected cases, for-profit businesses might qualify for innovative research grants. See <http://mtip.mt.gov>.

Recommended Resources:

Business Expansion And Retention (BEAR) Team

Gloria O'Rourke
Montana Economic Development Services, PLLC
118 E. Seventh St.; Suite 2A (Third Floor)
Anaconda, MT 59711
[406-563-5259](tel:406-563-5259) Office

[406-563-5476](tel:406-563-5476) FAX

<http://www.medamembers.org>

Kara Graetz, Gallatin County BEAR

406-582-9228

Montana Manufacturing Extension Center (MMEC)

Mark Shyne

Field Engineer

406-994-3813 office

406-581-3772 cell

Bozeman, MT

Montana Manufacturing Extension Center, <http://www.mtmanufacturingcenter.com>

Northern Rocky Mountain Economic Development District

State of Montana Procurement Technical Assistance Center

Maureen Jewell and Kathy Lund

406-256-6871

222 North 32nd Street, #200

Billings, MT 59101

Deanna Langman, Billings PTAC.

Montana Procurement Technical Assistance Centers, <http://bigskyeda-edc.org/marketing-to-the-government.php>

Association of Procurement Technical Assistance Centers, <http://www.aptac-us.org/new/>

State of Montana Incumbent Worker Training Program

Chris Wilhelm

Phone: (406) 444-3351

Email: ChrisWilhelm@mt.gov

Growth Through Agriculture Program

Montana Department of Agriculture

Angie Nelson, Program Manager

302 N Roberts

Helena, MT 59601

Phone: (406) 444-2402

E-mail: gta@mt.gov

Fax: (406) 444-9442

<http://agr.mt.gov/agr/Programs/Development/GrantsLoans/GTA/>

ISSUE: Consider Tools (Inter-Modal Facility, Financial Tools, TIFD, Cooperatives)

Recommendations:

The Belgrade community expressed multiple needs related to community growth. The use of a Tax Increment Finance District (TIFD) is a valuable tool in developing public infrastructure. Consider creating a TIFD that would include the areas where property has been purchased for development (the box store development and hotel) and where the community would like to see future planned growth. This would provide the Belgrade community with future resources which could be used for water, sewer, sidewalks, bike paths, infrastructure needs and as an incentive for business development within this area as allowed by current TIFD law.

Similarly the downtown core could create a revitalization district, including a TIFD which could be utilized to attract businesses with incentives to locate in Belgrade's core area.

Learn more about TIFDs by attending the workshop presentation on Tax Increment Finance Training. The TIFD concept can be challenging to explain to community members. Be familiar with the concept or have experts assist with the explanation process to the community.

Belgrade may also want to consider looking into the creation of an Industrial Tax Increment Finance District. This type of finance district could be very beneficial in developing the infrastructure and redundancy necessary for a state of art industrial park. Belgrade has the transportation systems in place that could be marketed to export businesses.

The Montana Board of Investments provides creative solutions to financial issues facing new and expanding businesses in the state of Montana. The Board administers a number of different loan programs that can be specifically tailored to meet an individual business's or local government's needs. **This may be a good tool to use in the development of the industrial park area.**

Programs are designed to stimulate economic development by assisting the private sector and local governments in financing new or expanded businesses as well as infrastructure development. Programs include the In-state Loan Program to help finance new or expanded businesses; the INTERCAP Program that provides loans to local governments; the Short Term Investment Pool (STIP) that allows state agencies and local governments short term investment opportunities; and the Unified Investment Program that invests and manages all state investment funds including state pension funds.

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Recommended Resources:

MEDA PROFESSIONAL DEVELOPMENT

TAX INCREMENT FINANCE TRAINING

May 18th, Montana Tech, Butte

[Tax Increment Financing Workshop Agenda 5-18-12](#)

Sponsored by PPL Montana in Partnership with American Planning Association

West Central Chapter

Big Sky Economic Development

Community Development Department

Patty Nordlund, Dianne Lehm, Sara Hudson, Allison Corbyn

222 North 32nd Street, #200

Billings, MT 59101

406-256-6871

www.bigskyeconomicdevelopment.com

Steve Zeier

TIFD Coordinator City of Billings

510 North Broadway, 4th Floor

Billings, MT 59101

406-247-8666

496-657-8327 FAX

zeiers@ci.billings.mt.us

Montana Board of Investments

Northern Rocky Mountain Economic Development District

HERB KULOW, CMB

Senior Portfolio Manager

Hkulow@mt.gov

406-444-1218

Fax 406-449-6579

<http://www.investmentmt.com/default.mcp>

www.grants.gov

ISSUE: Build Startup Business Base

Recommendations:

Belgrade has a great business base and has zeroed in on the industrial manufacturing sector well. By utilizing the assistance of Montana's Small Business Administration, Montana Manufacturing Extension Center and the Small Business Development Centers to work with emerging businesses Belgrade could capitalize on this growing market. Each of these organizations can walk a business owner, entrepreneur, or second stage business through the necessary steps to start a new product, new business, or business expansion.

One-on-one outreach to the business community is a great tool to help build the community business base. Talk to business owners, thank them for being a community business and provide them with resources if needed. Be an advocate for the community. Talk to businesses you would like to see expand to the area and provide the encouragement that the community want them and show them why it's a great place to live, work and play!

Montana State University business students need experience with developing strategic planning, business plans and marketing plans. Many professors require the students to do group projects to work with a business or community to develop these types of documents, do visioning sessions, and project planning. Make use these talented folks if possible. Many of these classes will even do the research and data collection at no or low cost.

Recommended Resources:

Small Business Development Center

Bozeman SBDC

Northern Rocky Mountain Economic Development District

Sean Becker, SBDC Business Advisor

seanb@mtcdc.org

Montana Community Development Corporation
222 East Main Street, Suite 202
Bozeman, MT 59715
(406) 728-9234 x250

Counties Served: Gallatin, Park

Small Business Administration

Montana District Office

10 West 15th Street Suite 1100

Helena, MT59626

United States

Phone:406-441-1081

Fax:406-441-1090

<http://www.sba.gov/about-offices-content/3/3126>

www.sba.gov

MSU Bozeman Business Program Students

ISSUE: Be pro-active in development decisions

Recommendations:

Belgrade has some great business growth opportunities on the near horizon and is in a position to make the most of that advantage. If the community acts relatively quickly in forming a Tax Increment Finance District (TIFD) there is the opportunity to influence and shape the direction and cultural appeal of the community. While the initial set up of a TIFD is tedious and at times challenging, the benefits are long lasting and provide a solid base to build for the future.

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Consider forming a Tax Increment Finance District for the area where proposed new box store will locate. This would be a great base for building the TIFD and providing for needed public infrastructure.

In being pro-active about development, consider an outreach program to local Belgrade businesses. Give them information on tools they might utilize to grow and expand their business. Some of these include the State of Montana business incentive programs to encourage business recruitment, development, expansion, and workforce advancement.

Planning efforts can be costly and grants are a great way to help cover those costs. The Big Sky Economic Development Trust Fund (BSTF) program is a state-funded program created by the Legislature. It is designed to assist businesses in the development of good paying jobs which promote long-term economic growth in Montana. Businesses work through a Certified Regional Development Corporation (CRDC) to obtain funding. The purpose of BSTF is to promote economic growth, create partnerships, retain and expand existing business, and encourage workforce training and job creation.

The BSTF program provides financial assistance through:

Category I Economic Development Job Creation Projects provide grants to assist businesses in creating net new eligible jobs that pay the average county wage, excluding benefits and meets the grant criteria.

Category II: Planning Projects funds are awarded to Certified Regional Development Corporations (CRDC), tribal governments and other qualified economic development organizations in areas not covered by a CRDC for planning activities. These funds can be used for creating business plans, feasibility studies, economic impact studies, workforce surveys, targeted industry analyses, preliminary engineering reports, and preliminary architectural reports.

This is a great tool for Belgrade to utilize in its community planning efforts.

The Montana Department of Commerce Business Resource Division assists communities, local economic development organizations and businesses with information and technical assistance, and financing for business startup and expansion projects in Montana. The website has a business resource guide to assist businesses.

Recommended Resources:

Big Sky Economic Development Trust Fund Program

Nancy Faroni

Northern Rocky Mountain Economic Development District

406-841-2744

301 S Park Ave Rm 107

Helena MT 59601

<http://bstf.mt.gov/default.mcp>

Big Sky Economic Development

Patty Nordlund, Dianne Lehm

222 North 32nd Street, #200

Billings, MT 59101

406-256-6871

Nordlund@bigskyeda.org

lehm@bigskyeda.org

Certified Regional Development Corporation (CRDC)

Beartooth RC&D

Chris Mehus

604 W. Front Street

Post Office Box 180

Joliet, MT 59041-0180

406-962-3914

Beartooth RC & D (CRDC) <http://www.beartooth.org/>

Janice Wannebo,

CRDC Program Manager

406-841-2751

Montana Department of Commerce

Northern Rocky Mountain Economic Development District

Business Resource Division

301 S Park Ave

Helena MT 59601

406-841-2730

Fax: 406-841-2731

TDD: 406-841-2702

<http://commerce.mt.gov/businessresources.mcpX>

ISSUE: Downtown Revitalization Plan (Marketing, Cohesion, Future)

Recommendations:

The Belgrade community expressed the desire to revitalize the downtown core, build on what businesses are thriving and plan for the future to create a cohesive downtown experience. The Big Sky Economic Development Trust Fund will provide grants to assist with some planning efforts. Starting the efforts with a community based visioning and master plan for the area will provide the road map for next steps in the process. Deciding what community members wants Belgrade to look like in 5, 10, 20 years will build community consensus and build excitement for the next chapter for the community.

A part of this process may include creating a Business Improvement District for the downtown core to aid with revitalization efforts. Business Improvement District funds could be used as matching funds for work on the master plan, beautification projects, store front facades, and more.

U.S. Economic Development Administration also provides grant funding to assist with planning. Utilizing several funding sources will help fill the gap in any required matching funds to complete the project. Consider approaching local service clubs, business owners, and area corporations about both local and corporate or foundation funding to assist with funding gaps as well.

Recommended Resources:

Big Sky Trust Fund Planning Grant

Big Sky Economic Development Trust Fund Program

Nancy Faroni

Northern Rocky Mountain Economic Development District

406-841-2744
301 S Park Ave Rm 107
Helena MT 59601

<http://bstf.mt.gov/default.mcpX>

US Department of Commerce
John Rogers
Economic Development Administration
Montana, Wyoming and North Dakota
301 S. Park Avenue, Suite 124
P.O. Box 578
Helena, MT 59624
Phone: 406-449-5380
Fax: 406-449-5381
Email: jrogers4@eda.doc.gov

<http://www.mtfinanceonline.com/brdlocaldevelopment.mcpX>

Lisa Harmon (BID & TIFD)

Executive Director

Downtown Billings Alliance

406-294-5060

lharmon@downtownbillings.com

<http://www.downtownbillings.com/aboutpages/businessimprovement.html>

Greg A. Krueger (Downtown Revitalization and TIFD)

gregk@downtownbillings.com

DOWNTOWN BILLINGS

2815 2nd Avenue North

Billings, MT 59101

406-294-5060

MAIN TOPIC: FAMILY ORIENTED COMMUNITY

ISSUE: Bike/Pedestrian Paths

Recommendations:

Listening session attendees mentioned the need for more pedestrian and bike paths around the community. An effective way to capture more funding for the community is to have both a government effort and a non-profit effort to raise funds for paths and trails. With both groups partnering on fundraising efforts for a trail system it will be easier to acquire grant funding. Communities are recognizing bike/pedestrian paths are part of what make a city a community and gathering place. Be creative and look for walkway space in unusual areas, not just along the roadway. It might be an alley that can be turned into a path or an area along a ditch/canal, a flood water retention area, think of areas that may be used for dual purposes.

Bikes Belong is a coalition that provides information and grant funding to assist with getting more people using bikes. Bike paths, bike lanes, and bike parks are eligible projects that Bikes Belong may fund. This may be a resource that could link two of Belgrade's priorities together. A bike park would continue to build upon the gather places and the splash park and continue to grow the downtown core.

Montana Fish Wildlife and Parks Recreation Trails Program would be a possible source of funding for bike paths and walkways in Belgrade. The grant program will consider projects that develop linkages between homes and work places or gathering sites, trail construction and maintenance, weed control, trailhead or trailside facilities, features for disabled individuals, traffic control devices and acquisition of easements for trails.

Recommended Resources:

Northern Rocky Mountain Economic Development District

Bikes Belong Coalition

P. O. Box 2359

Boulder, CO 80306

303-449-4893

303-442-2936

www.bikesbelong.org

Montana Fish Wildlife and Parks Recreation Trails Grant Program

<http://fwp.mt.gov/recreation/grants/rtp/default.html>

Safe Routes to Schools

Taylor Lonsdale

Montana Safe Routes to School Coordinator

Mobility and Public Transportation
Western Transportation Institute (WTI)
Montana State University-Bozeman
PO Box 174250
Bozeman, MT 59717-4250

Phone Number: (406) 994-7031

Fax Number: (406) 994-1697

Email: taylor.lonsdale@coe.montana.edu

State Website <http://www.mdt.mt.gov/pubinvolve/saferoutes>

www.saferoutesinfo.org/funding-portal

Community Development Block Grant Funds

Darlene Tussing (Heritage Trail Plan/Implementation)

Northern Rocky Mountain Economic Development District

Active Transportation Alternates

3033 Demaret Place

Billings, MT 59106

darlene.tussing@gmail.com

406-860-6121

Montana Community Transportation Enhancement program

<http://www.mdt.mt.gov/business/ctep/>

ISSUE: Continue building interior activity options i.e., indoor soccer with splash park.

Recommendations:

Residents of Belgrade gave input on the need for new gathering places in the community. Everything from expanding the splash park to indoor soccer, and swimming pools were mentioned. Community buildings and projects can be challenging to spearhead with the diversity of interests. Trying to find an idea that could incorporate multiple options or activities would help to build community wide excitement for the project.

Belgrade is ahead of many communities by already having a splash park. This seems to be the growing trend for community water features. The expenses associated with swimming pools often makes them cost prohibitive. After carefully weighing the options, building costs, maintenance and insurance costs, etc. select what fits best with the community. From comments, Belgrade's splash park is a destination that could be expanded upon to draw the community closer.

While exploring funding options, investigate the Land and Water Conservation Fund grants. The funding guidelines may help to determine what type of activities fits best in the community and fit best with the available funds. Project funding is always a big challenge. Below are some websites to sign up for free e-newsletters to assist with searching for funds.

Montana State University Billings produces a Montana Foundation Directory about every two years. The directory gives the names and basic information on foundations that give to projects in Montana. This is

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a great resource if planning to seek funding through grants. There is a cost to purchase the book, but it is affordable for all the research is provided.

Recommended Resources:

Walter W. Timmerman

Land and Water Conservation Fund

Montana State Parks

1420 6th Avenue

P.O. Box 200701

Helena, MT 59620

(406) 444-3753

[wtimmerman@mt.gov](mailto:wimmerman@mt.gov)

<http://fwp.mt.gov/recreation/grants/lwcf/>

You can obtain information and sign up for free grants alerts on several web sites. Most have some information available at no charge, and offer additional services for a fee. I would recommend not paying for additional services. With the availability of information by electronic means, the information is available without charge by doing some research. Here are some places to start:

The Foundation Center, at www.fdncenter.org The MSU library is a cooperating collection with The Foundation Center. At the MSU library, you can access the full database of grantmakers through the “FC Search” program. Ask a librarian for assistance. You will also want to subscribe (it’s free) to the Foundation Center’s *Philanthropy News Digest*.

The Grantsmanship Center: www.tgci.com

Grant Station: <http://www.grantstation.com/>

www.seliger.com

Northern Rocky Mountain Economic Development District

See the Montana Community Foundation site, www.mtcf.org

Rural Community Assistance Corporation, www.rcac.org

Look for federal government information at www.grants.gov

Learn about State of Montana opportunities at <http://mt.gov> and search for grant programs by agency or department.

MSU Foundation Directory: <http://www.msubillings.edu/library/forms/FoundationDirectoryOrder.aspx>

ISSUE: Celebrate Belgrade's successes!

Recommendations:

Belgrade is full of wonderful successes and each one needs to be acknowledged. The Belgrade Chamber could host an annual Community Awards event and to showcase the successes. These might include Business of the Year, Youth Group Award, Volunteer Award, Belgrade Ambassador of the Year, Young Entrepreneur, etc. which points to the great things happening in the community. It could be tied into the Fall Festival or as a separate event.

ISSUE: Off-hour child care/sick child care

Recommended Resources:

Human Resource Development Council

ISSUE: Beautification/ Pride of Ownership

Recommendations:

Consider creating a beautification/ upgrade awards program. It could be tied in with the Chamber awards to help celebrate the success. The Business Improvement District would also help with the

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improvements and build the cohesive feeling of the community. Highlight areas, homes, businesses that are really making the effort to make their property welcoming.

MAIN TOPIC: INFRASTRUCTURE

ISSUE: Curbs, sidewalks, gutters, paved streets – not easy. Sidewalks nice – but may have other priorities/alternatives, i.e. asphalt path.

Recommended Resources:

Bikes Belong Coalition

P. O. Box 2359

Boulder, CO 80306

303-449-4893

303-442-2936

www.bikesbelong.org

Montana Fish Wildlife and Parks Recreation Trails Grant Program

<http://fwp.mt.gov/recreation/grants/rtp/default.html>

Safe Routes to Schools

Taylor Lonsdale

Montana Safe Routes to School Coordinator

Mobility and Public Transportation
Western Transportation Institute (WTI)
Montana State University-Bozeman

Northern Rocky Mountain Economic Development District

PO Box 174250
Bozeman, MT 59717-4250

Phone Number: (406) 994-7031

Fax Number: (406) 994-1697

Email: taylor.lonsdale@coe.montana.edu

State Website <http://www.mdt.mt.gov/pubinvolve/saferoutes>

www.saferoutesinfo.org/funding-portal

Community Development Block Grant Funds

Darlene Tussing (Heritage Trail Plan/Implementation)

Active Transportation Alternates

3033 Demaret Place

Billings, MT 59106

darlene.tussing@gmail.com

406-860-6121

Montana Community Transportation Enhancement program

<http://www.mdt.mt.gov/business/ctep/>

Montana Department of Natural Resources and Conservation (DNRC) Water Resources Regional Office

2273 Boot Hill Court, Suite 110

Bozeman, Montana 59715

Phone: 406/586-3136

Fax: 406/587-9726

MAIN TOPIC: YOUTH AND SENIORS

ISSUES: YOUTH

Recommendations:

Belgrade community listening sessions provided a mix of responses regarding youth. Responses from youth had not been received at the time of the community meetings. Consider a Survey Belgrade Youth and see what they have to say. Are they interested in mountain bike paths, skateboard parks, an Internet/soda shop type gather spot? Find out how they spend their time after school and on weekends. What they like to do in Belgrade now. What they envision for Belgrade and why. Their responses will provide some direction on the next steps in the process and don't forget to keep them involved in the process as it moves forward.

Consider expanding the successful entrepreneur classes and consider engaging younger students at some level as resources allow.

Resources:

Montana State University students

ISSUES: SENIORS

Recommendations:

In touring Belgrade and in community listening sessions it seemed community seniors needed more space for activities and more housing options. The over 65 population is growing quickly and the need for more community service space and senior housing will increase everywhere. Consider looking at the Community Development Block Grant program for funding options to expand the current senior center or build an additional center.

Consider encouraging new single and multi-unit development to incorporate universal design standards. Universal design elements make each unit accessible to those with disabilities. Accessible housing is a key to keeping community members part of the community.

Resources:

Area Agency on Aging

MAIN TOPIC: CONNECT BELGRADE

ISSUE: All Organization Meeting

Belgrade residents voiced the issue of needing to know what other organizations in the community are doing to prevent overlaps in projects and major events scheduling. Belgrade does have an active volunteer group that has the pulse of the community and expanding on that can only strengthen the sense of community more.

Recommendations:

Form a partnership of all area non-profit groups. This group, with a representative from each organization, could meet once a quarter or every other month to share information on their organization, up-coming events, and current activities. This would help create a network of cohesive community groups and may get volunteers crossing over to assist on different events. This also makes a great network with which to garner supporting partners, support letters, etc. for future projects and grant requests.

Select an organization to host a community calendar where all events, meetings, and activities could be posted. (Belgrade Chamber, Belgrade Facebook page, Newspaper) Another possibility is to look at a web hosted site like bigtent.com where group members could also post their activities, events, and meeting schedules.

Consider joining the Montana Non-profit Association and consider having a local chapter.

Recommended Resources:

<http://www.mtnonprofit.org/>

Big Sky Economic Development

Community Development Team

Patty Nordlund, Dianne Lehm, Sara Hudson, Allison Corbyn

Northern Rocky Mountain Economic Development District

222 North 32nd Street, #200

Billings, MT 59101

406-256-6871

www.eburd.com (partnership of over 23 local organizations including city/county employees)

<http://www.bigtent.com/>

ISSUE: Volunteer Development

Residents of Belgrade expressed a need to expand and diversify the volunteer base in the community.

Recommendations:

At all events have a booth/contact person for individuals and groups that would like to help/volunteer in the future.

Post announcements for volunteers needed on websites, newspaper, events, and meetings.

REPORT BY: FRAN VIERECK

Retired State Employee/Program Manager

1709 Eighth Ave.

Helena, MT 59601-4644

Ph: 406.443.1924

Email: sojamawi@gmail.com

MAIN TOPIC: ACCESS AND TRANSPORTATION

ISSUE: Transportation such as rail/airport divides the community.

We heard community members say that transportation issues such as rail, airport and Interstate 90 divide the city of Belgrade. Belgrade's population and housing have grown rapidly; its transportation systems have reacted to the explosive community growth but not quite fast enough. We heard that emergency response crews sometimes can't get across the city because of trains blocking the three railroad crossings.

Recommendations:

Safe, efficient and effective transportation make a community predictable. In a perfect transportation system, emergency services are accessed when needed and traffic moves in a safe, fluid way.

- Construction of an East Belgrade Interchange. This project is in the pre-construction phase with the Montana Department of Transportation (MDT). Considerable matching funds from Gallatin County may delay or suspend the project. With county support, it could be a federal-aid highway construction project. Without county support, the project would likely have to be funded by federal dollars only; political support would be needed.
- Enlist serious community and political support for this project now. This project is too important for Belgrade. Don't let it fail.
- The interchange would connect with Alaska Road South and provide emergency medical responders with consistent access to the south side of town (via an I 90 underpass) at all times.
- A railroad underpass at Jackrabbit Lane would provide Belgrade with emergency medical access on the west side of town even when a train is passing through.

Recommended Resources:

<http://www.mdt.mt.gov/safe>

<http://www.mdt.mt.gov/pub>

ISSUE: Use what you have to advantage

We saw and heard about Belgrade's rail line in the middle of its old town with I 90 dividing it from the newer part of town and Bozeman's airport on its eastern edge. Belgrade should use these existing assets to its best advantage by maximizing transport modules such as air, rail, trucking and the proximity to I 90.

Recommendations:

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- Recruit big box store distribution centers. Wal-Mart, for example does not have a distribution center in Montana. There's one 600 miles to the west in tiny Hermiston, Oregon. Murdoch's has a small distribution facility in Belgrade; what about helping Murdoch's expand?
- Recruit more courier and cargo distribution systems. Fed-Ex has a center at the Bozeman airport. What about other couriers?
- Create a multimodal facility that transfers container shipping from rail to truck and vice versa.

Recommended Resources:

<http://resume.edjent.com/pdfs/strategicmanagment.pdf>

<http://www.algulfcoastvideo.com/WalmartDistributionCenters.pdf>

ISSUE: Mitigation plan needed to prepare for increased train traffic

We heard residents and others say that a mitigation plan is needed to prepare for increased train traffic. Coal train traffic could potentially increase to 60 trains per day as Montana's coal production increases.

Recommendations:

- With Gallatin County and the City of Bozeman's help, write an area mitigation plan for the coming coal trains.
- Involve the community.
- Include the Department of Environmental Quality and MDT's Rail and Transit Unit in the planning processes.
- Be proactive instead of reactive in this process.
- Learn from mistakes other cities and towns have made.

Recommended Resources:

<http://www.coaltrainfacts.org/key-facts>

<http://www.deq.mt.gov/ppa/default.mcpX>

ISSUE: Interchange

We heard planners and residents talk about the need for a Belgrade East Interchange that would meet multiple community needs.

Recommendations:

- Construction of an East Belgrade Interchange. This project is in the pre-construction phase with the Montana Department of Transportation (MDT). Considerable matching funds from Gallatin County may delay or suspend the project. With county support, it could be a federal-aid highway construction project. Without county support, the project would likely have to be funded by federal dollars only; political support would be needed.
- Enlist serious community and political support for this project now. It's too important to Belgrade. Don't let it fail.

Recommended Resource:

<http://www.mdt.mt.gov/pub>

ISSUE: Ease city traffic

We heard and saw the need to ease city traffic, especially downtown. We saw concrete trucks, bully dumps, side dumps and end dump trucks drive past our meeting space at the Belgrade Chamber of Commerce. We also saw an endless stream of passenger cars drive through downtown during the days we listened.

Recommendations:

- Construction of an East Belgrade Interchange. This project is in the pre-construction phase with the Montana Department of Transportation (MDT). Considerable matching funds from Gallatin County may delay or suspend the project. With county support, it could be a federal-aid highway construction project. Without county support, the project would likely have to be funded by federal dollars only; political support would be needed.
- The interchange would connect with Alaska Road South and provide consistent access to the south side of town (via an I 90 underpass) at all times.
- Enlist serious community and political support for this project now. It's too important to Belgrade. Don't let it fail.
- A current MDT project called *Amsterdam Road/I 90 Eastbound On Ramp* could help ease downtown congestion. This project will occur at the Amsterdam Road exit at I 90 (where signal was installed this year). This project will allow the traveling public the option of accessing I 90 without traveling on Jackrabbit Lane.

ISSUE: Second Access to Bruce Industrial Park

A second access point for a Bruce Industrial Park is something that we heard you say.

Financing for its infrastructure was also mentioned.

Recommendation:

- Developmentally, this issue is a much lower priority and should be addressed after emergency medical access and traffic congestion issues are resolved.

ISSUE: Improve entry way corridors

We heard you say that you want to improve the entry way corridor and market opportunities to showcase Belgrade on the eastern edge of town.

Recommendation:

- Construction of an East Belgrade Interchange. This project is in the pre-construction phase with the Montana Department of Transportation (MDT). Considerable matching funds from Gallatin County may delay or suspend the project. With county support, it could be a federal-aid highway construction project.
- This project will be the east entry way to Belgrade, the entry to the Bozeman airport and, a north entry to Yellowstone Park. Belgrade must capture this opportunity by developing an attractive welcome with inviting year round vegetation. Travelers heading to Yellowstone must stop in Belgrade for essentials and groceries. Belgrade can't lose out on this economic development opportunity.

Recommended Resources:

<http://travelmontana.mt.gov/>

<http://mtmainstreet.mt.gov/default.mcpx>

ISSUE: Connect Belgrade!

In our tour of the community we saw the need to physically connect River Rock, Landmark and Cobblestone subdivisions to the city. The residents of those areas need to use Belgrade services.

Recommendation:

- Construct an Interstate 90 underpass on the west end of Belgrade that connects the north side with Thorpe Road on the south side of I 90.
- The underpass will likely improve emergency medical access.

MAIN TOPIC: IMMEDIATE TRAFFIC CONTROL

ISSUE:

We heard you say that the Madison and Broadway four-way stop is an accident waiting to happen.

Recommendation:

- Construct a roundabout. There are three newer roundabouts in Helena area (behind Capital Hill Mall at Sanders Street and Butte Avenue, on Canyon Ferry Road at Lake Helena Drive and, at Colonial Drive and Saddle Drive near the South Hills Interchange) . There's a more than 50 year old roundabout at the intersection of Pacific Coast Highway and Lakewood Boulevard in Long Beach, California. Roundabouts work well. They succeed with high volumes of traffic.

Recommended Resources:

<http://www.mdt.mt.gov/travinfo/roundabouts/history.shtml>

<http://www.mdt.mt.gov/travinfo/roundabouts/>

ISSUE: We heard you say that you want to participate in transportation planning.

Recommendation:

- Create a Belgrade Transportation Policy Coordinating Committee (TPCC). (In my research, I only found one other in Montana --- in Missoula.)

Recommended Resources:

<http://www.mdt.mt.gov/search.shtml>

MAIN TOPIC: INFRASTRUCTURE

ISSUE: Curbs, Sidewalks, Gutters

We heard you say that curbs, sidewalks, gutters, paved streets are not easy to afford.

Recommendations:

- Access and utilize the Community Transportation Enhancement Program “CTEP” at MDT. (I checked with CTEP’s program manager in Helena. He said that Belgrade has \$215,000 in its CTEP account at this time.)
- CTEP funds curb, gutter and sidewalk projects, etc. CTEP also funds other projects such as bike and pedestrian paths.
- To use those funds, a community must provide a 13.42% match. Matching funds can include Community Development Block Grant (CDBG) funds, for example. Only two Belgrade CTEP projects have occurred in the program’s history.
- Apply for a CDBG-ED planning grant for a project’s preliminary engineering report.

Recommended Resources:

<http://www.mdt.mt.gov/business/ctep/>

<http://cdbged.mt.gov/content/docs/PlanGrant/CDBGEDPlanningGrantGuidelines.pdf>

REPORT BY: TRACY McINTYRE

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Email: tracy@eurekardp.net

<http://www.eurekardp.net>

MAIN TOPIC: BUSINESS DEVELOPMENT

ISSUES: Add Value to Ag Products – process and ship from Belgrade

Resources:

The Growth Through Agriculture Programs and the Montana Department of Agriculture are great resources for the development of agricultural products. They can make recommendations for marketing ideas, help connect with Made In Montana Program, and have grant funds to help a business plan and train as well as purchase equipment and expansion work.

Angela Nelson, Program Manager
Growth Through Agriculture Program
Montana Department of Agriculture
302 North Roberts
PO Box 200201
Helena, MT 59620
Office: 406-444-2402
Fax: 406-444-9442
anelson@mt.gov
www.agr.mt.gov/business/GTA.asp

Angela DeYoung, Marketing specialist
Montana Department of Agriculture
302 North Roberts

Northern Rocky Mountain Economic Development District

PO Box 200201

Helena, MT 59620

Office: 444-0134

Collin Watters, Bureau Chief Agricultural Marketing & Business Development Bureau

Montana Department of Agriculture

302 North Roberts

PO Box 200201

Helena, MT 59620

Office: 444-5423

Made In Montana Program

301 S. Park Ave

PO box 200505

Helena, MT 59620-0505

406-841-2757

<http://madeinmontanausa.com>

ISSUE: Consider tools, i.e., Inter-Modal Facility, Financial tools such as Tax Increment Finance Districts, Cooperatives

Recommendations: Businesses often time need additional assistance to develop financials and prepare them for contacting financial institutions. Some of the technical assistance can be tapped into by contacting the following. Most of the economic development organizations can help connect a business to the entity that best fits their needs.

Resources:

Northern Rocky Mountain Economic Development District

Brian Gion

Montana Cooperative Development Center

PO Box 3027

12 3rd Street NW, Suite 110

Great Falls, MT 59404

mcdc@mcdc.coop

406-727-1517

Stuart Leidner, CEO

Prospera Business Network

2015 Charlotte Street, Suite #1

Bozeman, Montana 59718

phone: 406-587-3113

fax: 406-587-9565

Montana World Trade Center (especially if looking at exporting anything out of the US)

Nicole Hagerman, Project Manager

Gallagher Business Bldg #257

Missoula, MT 59812-6798

Nicole@mwtc.org

406-243-6982

* The Montana World Trade Center in partnership with the Forestry Business Network is doing some great new programming on international trade opportunities in Wood.

Forestry Business Network

Northern Rocky Mountain Economic Development District

Craig Rawlings

(406) 240-0300.

Dave Glaser

Montana Community Development Corporation (they have a local branch in Bozeman)

110 E. Broadway, 2nd Floor

Missoula, MT 59715

OR

222 East Main, Suite 202

Bozeman, MT 59715

Phone: (406) 728-9234

Toll Free Phone: (888) 745-5601

* Loans and SBDC, extension 200

* PTAC in Missoula, extension 218

* PTAC in Kalispell, extension 240

Fax: (406) 542-6671

E-mail: info@mtcdc.org

MEDA is also hosting a Tax Increment Finance District training on May 18th in Butte.

Contact Janet Cornish for more TIF information at:

Janet A. Cornish, Principal

Community Development Services of Montana

954 Caledonia Street

Butte, Montana 59701-9002

[406-723-7993](tel:406-723-7993)

JanAllyce@aol.com

<http://cdsofmontana.com>

Possibly explore the Montana Department of Transportation Disadvantage Business Enterprise (DBE) for opportunities. They can do special workshops for DBE businesses and

are a good source of information. Also, connect with the Montana SBA offices and the local SBDC office to host workshops on business planning and business financial management.

ISSUE: Build on excellent start-up base that already exists - Market what you have

Recommendations and Resources:

Marketing is a continual struggle for most Montana companies. The USDA-Rural Development has a program called R-MAP that Montana CDC (listed above) has received. There is a small amount of money to help individual businesses to market and also some technical assistance provided through that program as well.

Marketing cooperatively is also an avenue that could be explored especially within in similar product lines (ie agricultural) or specific areas such as the downtown. Brian Gion with the MCDC (listed above) would be a good person to visit with to determine if a marketing cooperative could be used.

ISSUE: Be pro-active to influence development decisions

Recommendations and Resources:

Continue the communication! The Belgrade Chamber has a lot of connections in the community and could be built upon to gain public information. Some ideas (which may already be occurring):

- Set up a Belgrade Chamber facebook page
- Send survey's (short and to the point) out via emails and Facebook
- Interactive booths at community events like sporting games, Fall festival etc.
- Dan Clark with Local Government Center in Bozeman is excellent resource to help facilitate community conversation and vision planning which would help in forming the vision for the community as well as increase citizen's participation. Dan can also help do leadership training for volunteers.

ISSUE: Downtown revitalization plan – Marketing, Cohesion, What do we want to look like in the future?

Recommendations:

Northern Rocky Mountain Economic Development District

The Chamber of Commerce could host a planning grant through the following entities in partnership with the County or City. If the downtown businesses are actively engaged matching dollars may be raised through their participation.

Resources:

Big Sky Trust Fund

Montana CDBG-ED planning grant

There are also planning dollars for communities that are adjusting their economic base through the USDOC Economic Development Administration. Warren or Larry should be able to connect with the Northern Rockery EDD to explore that option.

ISSUE: Broadband Redundancy – be ready for huge data load needs

Recommendation and Resource:

There is an initiative about Broadband in rural communities starting across the US. www.saveruralbroadband.com that all rural communicates should be aware of.

ISSUE: Use access and market to airport

Recommendations and Resources:

Montana West Economic Development did a really amazing video that plays on video kiosks in the Glacier International Airport. There is a possibility to tap into MSU and see if there are any students who could do a video showcasing why businesses should look at Belgrade and also highlight why businesses are ALREADY in Belgrade. Kim Morisaki with Montana West is a great resource to visit with. Her number is 406-257-7711 ext. 3.

MAIN TOPIC: FAMILY ORIENTED COMMUNITY

ISSUE: Support the Chamber in creating more family events.

Recommendation:

Montana Tourism Visit MT and the local tourism region would be great assets with building local events as well as creating tourism traffic for Belgrade, if desired.

Resources:

Montana Office of Tourism has two grant programs that also may be of use for this section:

- Special Events Grant Program (SECP)
- Tourism Infrastructure Investment Program (TIIP)

ISSUE: Bike/Pedestrian paths

Recommendations and Resources:

Some sources of potential funding for pathways are:

- Bikes Belong
- Kodak Green Space, we used this one to help design a segment of the Riverside Park
- Community Transportation Enhancement Program (CTEP)
- Private Foundations:
 - MSU-Billings publishes a Foundation Grant Resource Book every other year that is very helpful finding foundation grants which would be key in expanding any of the community facilities listed here.

Cooperatives are a good way at looking into Child care if enough parents are involved. Again, Brian Gion with MCDC is a good resource for this section.

MAIN TOPIC: HOUSING

ISSUE: Manufactured homes and trailer cooperatives

Recommendations:

Montana Cooperative Development (MCDC) and Neighborhood Works, Inc have recently come together on this specific issue. There is a special source of loan dollars that can be accessed that will allow manufactured home owners to purchase the land for the park. There are a lot of details still and the MCDC's Cooperative Specialists will be taking a training this summer. Brian Gion (listed above) would be able to start the exploration of this program.

Resources:

Other possible programs to discuss the need with are:

- Montana Department of Commerce- Montana Board of Housing
- HRDC Bozeman
32 South Tracy
Bozeman, Montana 59715
ph 406.587.4486
fx 406.585.3538
www.thehrdc.org

ISSUE: Beautification

Recommendations and Resources:

Again, the MSU-Billings publication for Montana Foundations may be a great resource for finding funding to help beautification projects. Another idea for beautification programs is through the DNRC local forester if Gallatin County has one and/or the NRCS offices. And, doing a beautification project around Arbor Day or Earth Day can sometimes ties into other funding sources.

MAIN TOPIC: INFRASTRUCTURE

ISSUES: Curbs, Sidewalks, Special Improvement Districts, etc.

Recommendations and Resources:

A capital improvement plan is a requirement to CDBG-Public Facilities as is the Preliminary Engineering Report. You must have these to apply for infrastructure funding through the Montana programs and it is beneficial to reference them while applying for EDA and USDA-RD funding as well. A good source for PER's and CIP's is the CDBG-PF planning grant. Jennifer Olson is the Chief of the Grant Division of Department of Commerce her number is 406-841-2773.

ISSUE: Finance infrastructure to Bruce Industrial Park

Recommendations and Resources:

For a business park probably the best funding is the Economic Development Administration program. Again, Northern Rocky EDD should be your contact to explore this option. If jobs are being created EDA can help bring infrastructure out to the business park. Another avenue to explore is Board of Investment and the InterCap Loan programs.

MAIN TOPIC: YOUTH AND SENIORS

ISSUES: YOUTH

Resources:

Potential Resources for Youth Based Projects are:

- MSU-Extension Services
- Youth Global Service Day
- Tony Hawke Foundation for Skateboard park (especially if you have a youth group leading the application)

BELGRADE LISTENING NOTES

WHAT ARE THE STRENGTHS AND ASSETS OF BELGRADE?

STRENGTHS - CITY GOVERNMENT SERVICES

- Great Schools
- Ditto – great schools
- Event Center
- Great Chamber
- Great Fire Department
- Great public services – second to none for a community our size
- People that live here – very proud and loyal to Belgrade
- Ditto, Ditto, Ditto
- Police, EMT's
- Great City Management
- Great community spirit
- Tight knit community
- We are a bedroom community but have tremendous community spirit – not a suburb.
- Bedroom community with a lot of pride and activity
- Distinct from Bozeman
- Great location
- Fall festival and other great activities
- Belgrade does its own thing for its citizens.
- Ditto all
- People live 20 miles north of Belgrade feel they are from Belgrade
- People work together and jump right in
- Hub of transportation in the valley – airport, interstate, rail
- Due to all that is here, easier to start a business here than in the surrounding areas
- Strong agricultural roots – two elevators
- Central Valley Fire District – serves 220 square miles; City has inter local agreement with Valley Fire.
- Affordability of housing
- Thoughtful community that makes good decisions.
- Montana State University
- Lots of recreation
- World Class steakhouse

STRENGTHS - EDUCATION

- The people – it is not a bedroom community – has its own character.
- Strong school system in Belgrade
- Nearness to interstate
- People and their commitment to kids- building a new elementary school.
- **Belgrade treats its kids as a priority – wonderful future leaders, kind, engaged, multi-faceted.**
- **Our students have so many interests, abilities and skills.**
- **Belgrade is a place that is friendly and invested.**
- **Our kids volunteer! They see the value of our community.**
- Businesses with which the school interacts are phenomenal supporters.
- Gallatin College – fairly new; college within the university system that offers one to two year programs. Similar mission to college of technologies. Here to serve the entire area.
- Culinary program – national competitors. (Won last year.)
- Career Transitions – workforce related training opportunities.
- CWTC Career Workforce Community Training Center – umbrella for workforce training opportunities. One stop location for training.
- Various education entities work well together
- Schools strive to be energy efficient
- Excellent collaboration among education and training entities
- Belgrade Library – book clubs, entrepreneurship training is great for kids, literacy programs, guard family needs; Won Montana Library of the Year
- Excellent wireless infrastructure

STRENGTHS - CIVIC LEADERS, CHURCHES, NON-PROFITS, PRIVATE CITIZENS

- FFA and FFA Alumni Association
- Career Workforce Training Center
- Senior Citizen
- Food bank Truck – easy to contribute now
- Gardening program through a local church
- 1,000 New Gardens program – program at MSU to prepare soil
- Belgrade Chamber – very helpful with information and support
- Big Brothers and Big Sisters
- Small town feeling – hope to preserve it
- Fall festival and other community events – need more to engage kids
- Safe environment
- Great schools, great administration

Northern Rocky Mountain Economic Development District

- Caring people
- We are fortunate to have very good non-profit corporations such as United Way – After School Program
- Help Center
- Habitat for Humanity
- Volunteerism is a big strength of Belgrade.
- Supper sports programs
- Abundance of churches – at least 13 – that are active in the community
- Splash Park
- Crisis line is available for mental health and/or domestic violence.

STRENGTHS - RETAIL AND SERVICES

- Excellent chamber for a small town
- Still have small town feel
- Ditto – people know who you are
- Manufacturing in this area is pretty cool
- Business projects start here
- Education system is good – great opportunities
- Ditto – although growing still has small town feel; Belgrade much friendlier than say, Bozeman
- Community feel
- Good schools
- Good fire district
- Great chamber
- City has good working relationship with businesses
- Very fortunate to have Joe Menicucci
- Revolving Loan Fund for business gap funding
- Spin off's from parent companies –
- Three medical service entities
- **Splash Park was a home run!**
- **Fall Festival is huge – a great success.**

STRENGTHS - AGRICULTURAL BUSINESSES/FARMERS AND RANCHERS

- The people
- Access to transportation
- Water- good lands and soils
- Bozeman has lost its ag infrastructure – so it has moved to Belgrade
- Ag businesses - Belgrade Sales and Service, elevators, large animal events, cheese plant, MSU Extension Office, ag businesses, implement dealers, etc.

Northern Rocky Mountain Economic Development District

- Farm and Ranch Show – held in April – celebrating area farm and ranch history
 - April 27 – 29; entire fair grounds, lots of vendors all ag related, learning activities for kids to do; lecture hall – every half hour new lecture;
- Growing local food producer base – vegetables, dairy, seeds, meat processing for personal use and gaming, horse boarding; landscapers,
- Farmer’s Market

STRENGTHS - MEDICAL PROVIDERS/SUPPORT BUSINESSES

- Small town atmosphere
- Good schools
- Array of professional services – adequate to serve population
- Grocery selection
- Airport
- New interchange project
- Library
- Senior Center
- Urgent care
- Primary care
- Community Help Partners
- Head Start
- PT, OT, chiropractors, pharmacies, etc.
- Central Valley Fire Dept.
- Good competition in the medical field here
- **Don’t know Belgrade has the services until you need them!**
- Fire Department - Gives back the community investment in the form of service
- Paramedics are on the same level as the folks on the ambulance – so care is the same level before the ambulance arrives.
- Senior medics in the county work for our Fire Department
- **Bleeding edge of care is right in front of the cutting edge of care.**
- 1500 emergencies per year; about half a dozen people resuscitated per year
- Lots of interaction with schools and existing organizations to train on CPR, etc.
- Present at a lot of events.
- **50 fire department members that volunteer their time – up to 40,000 hours per year in time given**
- Takes a team to provide true assistance and Belgrade has that team in place.
- Belgrade now has a School District Nurse
- Streamline – HRDC community busing system that connects Bozeman, Belgrade, University and Four Corners. Free service.

Northern Rocky Mountain Economic Development District

- Joe Menicucci's use of CTEP funding.
- Girl Scouts, Boy Scouts, 4-H
- Water park – great success – brings people in from Bozeman

STRENGTHS - TRANSPORTATION/INFRASTRUCTURE – AIRPORT, RAIL, STREETS, UTILITIES

- **Intermodal connection – good north south roads, I90 goes east west, we have rail and airport.
Great position to be in!**
- Belgrade is master of own destiny in determining how to spend federal funds.
- Small community – is an asset.
- Energy boom –
- StreamLine transportation
- The community of 20 – 30 years ago is still out there – good infrastructure to build on.

STRENGTHS - SENIOR CITIZENS

- 125 volunteers involved with the Senior Citizen Center
- The people of Belgrade.
- No Bozeman traffic
- It is the only place I have lived; it is the only place to be.
- Our Director, Shannon.
- We drive in from River Rock – large outlying population.

BELGRADE LISTENING NOTES

WHAT ARE THE PROBLEMS AND CHALLENGES OF BELGRADE?

CHALLENGES - CITY GOVERNMENT SERVICES

- Bedroom community
- 3,000 kids in school system – majority not from town
- Train –
- Main street was not designed for the volume it is getting – throw in a train crossing and you have serious safety issues.
- Backed up train can cause serious safety issues.
- Waste Water Treatment – needs to be expanded – add more storage
- Infrastructure – small town that got big quick; still playing catch up.
- Traffic within Belgrade
- Traffic outside Belgrade – too much traffic on roads not designed for it.
- Subdivisions from “here, heck and gone” – how do we provide services?

Northern Rocky Mountain Economic Development District

- Bridges need upgraded
- Fire retention needed
- **There is a misperception that Belgrade's issues are insurmountable.**
 - Note – but people choose to live here.
- A strong tax base is missing.
- Pedestrian traffic is missing – people use the street; need the tax base to pay for sidewalks.
- Need a ladder truck for the fire department.
- Living near Bozeman is a blessing and a curse; challenge is adding retail businesses.
- Parking – truck traffic can make for difficult parking.
- Do not have a central business district – challenge for promotions, i.e. – Sidewalk Sales
- Overshadowed by Bozeman – people more familiar with Bozeman.
- Shopping leakage – people go to Bozeman.
- Physical structures (train, rail, airport) may cause physical divisions in the future, i.e. school busing.
- 17 to 20 trains come through every day...more may be coming
- More coal trains coming through – dust may effect air quality
- Concerns of cuts in federal funding; grants and project funding dwindling.
- Belgrade is not a tourist destination

CHALLENGES - EDUCATION

- Not enough for students to do here –our students are diverse in what they are interested in, but we don't have enough options for the students.
- Kids like to hang out with kids – no place for kids to hang out safely – no bowling alley, no theater, community center for kids.
- Our sidewalks don't connect
- Challenge to keep up with future job training needs
- Belgrade will start growing again soon – transportation problems within Belgrade will grow.
- Long range capital improvements for the school system will be a challenge
- Ditto
- People work outside of Belgrade – when we need volunteers in the school, hard to find them as they are at work.
- Agencies are understaffed and underfunded.
- Those corporations funding research through MSU – get them to consider Belgrade's workforce – educate our workforce.
- Difficult to entice Bozeman people to visit Belgrade.
- We have businesses that start small, and grow –get bought out, and leave Belgrade.
- Lack of opportunities for people, young and old, that want to stay here with a good quality job.
- Not enough day care – especially have infant care need. Need for odd hours; sick child care is non existent.
- So much truck traffic on Main Street – very tough for pedestrians and parking.

Northern Rocky Mountain Economic Development District

- More staffing and funding for Belgrade Library

CHALLENGES - CIVIC LEADERS, CHURCHES, NON-PROFITS, PRIVATE CITIZENS

- Emphasis on visioning for Belgrade seems to involve Main Street...needs to go much beyond inner Belgrade. Must include River Rock, Landmark, Cobblestone – - involves thousands of people.
- Delivering services such as high speed internet, Meals on Wheels, etc. – needs to improve in the Belgrade outlying areas such as River Rock.
- People in outlying areas of Belgrade don't feel they are a part of Belgrade.
- Adult Ed services
- Belgrade school funding – people are watching to see how the funds are spent.
- Crisis of vision – must expand the vision to outer areas.
- Feel like the neglected step-child of Bozeman sometimes.
- Bozeman Yellowstone International Airport – name choice could have included Belgrade
- Wish there were more activities that engage families – community events
- More family restaurants
- Improve more parks like Lewis and Clark Parks
- We do have good volunteers but they are the same volunteers – burn out
- 40 kids waiting for a Big Brother or Big Sister in Belgrade
- Need more work on our trail systems – have some trails but they are not connected and involve walking on highway to get to another trail. No shoulders.
- Concern for trailer parks closing if they don't get on city water and sewer

CHALLENGES - RETAIL AND SERVICES

- Always competing with Bozeman – only 9 miles away
- Business often goes to Bozeman
- No place to hold really big events – so event is held in Bozeman
- Realtors discourage home buying in Belgrade – say there are no services
- Library struggles with demand for services
- What makes up Belgrade lives outside the city limits
- Access – sometimes traffic prevents people from coming in to Belgrade
- No pediatrician
- **Need to clean up Belgrade – does not appear to be loved; need curbs, gutters, etc.**
- Groups sometimes want to disassociate themselves with Belgrade
- Ditto
- Downtown keeps moving – rail road tracks don't help
- Always the same core group that support Belgrade
- More in the audience when we have sporting events
- Grown in population but not business base – so struggle with infrastructure funding

CHALLENGES - AGRICULTURAL BUSINESSES/FARMERS AND RANCHERS

- Regulatory issues of getting your product to consumers
- Liability insurance
- Food processing and preserving
- Fragmentation of family farms – if multiple children, farm can't sustain all of the families
- Labor – paying payroll tax and workman's comp
- Developing own market and delivery system is a challenge
- The commodities market is so very complicated
- Non-compatible uses – conversion of prime land from ag to residential; how ag relates to subdivisions.
- Water use facilities – problems will only grow in the future
- Mammoth Ditch runs through the proposed city baseball fields

CHALLENGES - MEDICAL PROVIDERS/SUPPORT BUSINESSES

- **Sidewalks, curbs and gutters!**
- Summer activities for children
- Pool – youth recreation
- Lack of tax base – industry and shopping
- Trail system
- Downtown Parking
- Not an active youth development program, i.e., pool, - to stay in town and do
- The train – blocks medical services – dangerous in this sense
- Fiber – difficulties in transferring data faster
- Filling in the medical gaps, i.e., OBGYN and pediatrician.
- Ditto sidewalks, curbs, gutters
- Transportation for patients needing to get to a doctor
- Substance abuse – typical as in other communities
- No car pooling to coordinate rides
- Struggle to find meeting room that does not require payment
- Need more community service – same volunteers at every meeting

CHALLENGES - TRANSPORTATION/INFRASTRUCTURE – AIRPORT, RAIL, STREETS, UTILITIES

- Finding a way to finance the needed improvements for transportation and infrastructure – will not see as much help from the government
- Small community – difficult to find financing
- Ditto – huge challenge to put financial pieces of the puzzle together

Northern Rocky Mountain Economic Development District

- Four way stop – heavy traffic – add a train/pedestrian incident and serious trouble; would need to impact parking to put in a light.
- Also hemmed in by airport
- **Lots of easy answers – but the answers take money.**
- **Farm to market roads are becoming residential.**

CHALLENGES - SENIOR CITIZENS

- Sidewalks.
- Streets don't connect
- More transportation – River Rock area
- Ditto
- Belgrade gas grown so fast the taxes haven't kept up with infrastructure needs.
- Interchange – not a priority – other things more needed.
- Need freezer space and food space at the center.
- **Senior Center has full time needs with part time staff.**
- Don't limit driver's license age to 80.

BELGRADE LISTENING NOTES

WHAT ARE SOME PROJECTS OR VISION YOU HAVE FOR THE FUTURE OF BELGRADE....IN THE NEXT 2, 5, 10, 20 YEARS?

PROJECTS - CITY GOVERNMENT SERVICES

- Build airport interchange - underpass/overpass to remove train traffic vs. safety/services issues (2 years)
- Ditto, ditto, ditto, ditto
- Sewer and Water (5 years)
- Ladder Truck (tomorrow)
- Continue to work well with surrounding communities as well as the state and federal entities to complete projects and improve associations.
- Opportunity right now to get in front of the interchange – be prepared with a plan!

Northern Rocky Mountain Economic Development District

- Chamber ambassadors are looking for more retail opportunities that would complement, not compete with current businesses. Something like a Shopko, one-stop shop without groceries.
- Beautification projects – build a nice downtown district, not necessarily retail district.
- Continue to draw manufacturing
- Town Pump property area developed.
- Continue these kinds of conversations.
- Be prepared for the economy to start growing again – major needs that must be met at the same time.
- Interchange solve a lot of problems – but also have to address sub-quality roads.
- Keep people in the community – splash park (people from Bozeman come here),
- Event Center expansion – connect other events and activities to it.
- Park development – get them finished
- Expand transportation system – interconnected trails as we lack sidewalks
- Figure out effect of the airport on the area – as it will continue to grow
- Medical Health Care Area
- Need unified projects – consider zoning
- Pedestrian corridor down Jackrabbit Lane
- Revamp Main Street for traffic flow
- Subdivisions – have to leave the city to patrol;

PROJECTS -EDUCATION

- Rec center for kids
- Ditto – can provide training for youth center.
- More sidewalks
- Rebuild Tech Quai
- New middle school
- Expand dual enrollment opportunities with Gallatin College and Belgrade students
- House all family support programs, i.e., Headstart and Thrive - one stop shop for families.
- Capital improvements plan made well known and tied to fund schools
- More after school programs and activities for high school age students
- Continue to support Belgrade Skatepark group
- Bikepath between Manhattan and Belgrade
- Compile an economic development package for corporations interested in moving to Gallatin Valley.
- Continue to offer and promote short term training.
- Long range plans of dealing with new (it is coming!) growth; i.e., safe routes to schools
- **Develop community identity**
- Create an opportunity for all graduating students to stay in this community
- Fill the Belgrade Mercantile Building (and figure out parking)

Northern Rocky Mountain Economic Development District

- We provide an excellent education – let's keep our students here!
- 21st Century Learning Center that would serve the entire valley corridor
- Resources to provide Junior Achievement as demanded in the area.
- Business recruitment – bring businesses here!
- Build that interchange.
- Build a bus system that brings people from Three Forks into Belgrade, MSU, etc.
- Swimming pool
- Continue to respond to employers needs and provide a trained workforce.
- Short term and long term plan for education growth – develop partners with the school district and training entities.
- More family activities, i.e., bowling, theater,
- Imagine a new high school that is joint Bozeman/Belgrade
- Improve bandwidth for large companies such as Oracle

PROJECTS -CIVIC LEADERS, CHURCHES, NON-PROFITS, PRIVATE CITIZENS

- Create more family community events
- Create more parks – like Lewis and Clark Park
- Adopt-A-Park; city willing to maintain parks but purchasing equipment is difficult
- Swimming pool; tennis courts; basketball courts – outdoor sports center (pending – but not the pool)
- Have events and restaurants for Belgrade - don't want to drive to Bozeman to attend an event
- More support for the library – more computers – demand far outstrips supply
- Broaden the visioning of Belgrade to include outlying areas

PROJECTS -RETAIL AND SERVICES

- Convention center
- Interchange – more access to our town must be good
- Fill in Jackrabbit strip – blank canvas
- Bring community together – community center; we are gaining population so tap into families
- Weekend family activities – in summer have the splash park, but other times of year?
- Expand and enrich our retail options
- More choices for family oriented restaurant
- Have great sports facility but where do teams take their students to eat
- **Replicate our successes - Splash Park – home run! – Fall Harvest; spend time as a community and figure out what is working**
- Access, parking, price, service – great things Belgrade has to build on
- Create our own identity

PROJECTS -AGRICULTURAL BUSINESSES/FARMERS AND RANCHERS

Northern Rocky Mountain Economic Development District

- Better collaboration with providing food products to MSU
- Vegetable/food processing plant – AERO, - similar to Ronan’s
- Utilize schools as in Bozeman Farm to Schools
- Continue to add and retain value so that it is grown, processed and shipped from Belgrade
- Maintain ag infrastructure
- Shortage of meeting locations now that County Kitchen has closed

PROJECTS -MEDICAL PROVIDERS/SUPPORT BUSINESSES

- **Sidewalks, curbs and gutters!**
- **Destination town – what can we build and they will come? (not shopping – Bozeman is too close)**
- Improve fiber data transfer speeds – Opticon has begun work on this.
- OBGYN and Pediatrician here
- Bike trails
- Convention center near the Town Pump
- Organized youth activities – give kids something to do here in town so not on the highway
- Fall Festival – replicate this type of event
- Find Belgrade’s nitch – antiques? Rocks?
- Continue to pursue EMT training in high school
- Replicate water park to draw people here
- Push community service and volunteerism in the schools and in the community

PROJECTS -TRANSPORTATION/INFRASTRUCTURE – AIRPORT, RAIL, STREETS, UTILITIES

- Interchange- continue to find the finance puzzle pieces
- Duplicate rebuilding as in Valley Center
- Federally eligible routes – MDT has sway over where we spend that money. The secondary highways (Frontage Road) – MDT does not have the ability to spend federal aid money on the highway. Is it possible to have secondary highway re-labeled as primary?
- End up with a grid system – East, West, North, South – lots of options.
- New community center with a pool.

PROJECTS -SENIOR CITIZENS

- New Senior Center
- Even expand more wheels on wheels
- Need a place to hold receptions, weddings, events with a commercial kitchen
- Clothing stores
- Health center
- Establish priorities for Belgrade and do them!