



➤ FINAL REPORT

## REGIONAL IMPACT STATEMENT

# SWEETGRASS DEVELOPMENT





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The study would not be possible without the time and dedicated efforts from the following people, organizations, agencies and local jurisdictions.

- » Sweetgrass Development Board of Directors
- » Cascade County Commissioners
- » Glacier County Commissioners
- » Pondera County Commissioners
- » Teton County Commissioners
- » Toole County Commissioners
- » Blackfeet Reservation
- » City of Choteau
- » City of Conrad
- » City of Cut Bank
- » City of Great Falls
- » City of Shelby
- » Town of Browning
- » Town of Fairfield
- » Port of North Montana Authority
- » Pondera Regional Port Authority
- » Sweetgrass Development Staff
  - » Sarah Converse – Executive Director
  - » Deven Merritt – Grant Development Officer
- » US Economic Development Administration
  - » Jodi Duncan – Program Specialist
- » KLJ Staff
  - » John How
  - » Shari Eslinger
  - » Joel Quanbeck
  - » Andrew Thierolf
  - » Jason Crawford
  - » Darcy Schmidt
  - » Carron Day
  - » Corvette Bohl
  - » Elizabeth Raab

Lastly, we would like to thank the multiple businesses, companies that provided valuable feedback, information and ideas for mitigation impacts to the region as well as for their input on solutions to issues facing their operations and the communities in which they operate. Without their input, this study would not be feasible. A full list of businesses that were interviewed and provided feedback are listed in Appendix A: Business List.

# ABSTRACT

The north-central Montana region is on the cusp of development and expansion in a variety of venues including oil and gas, agricultural diversity and manufacturing. Each community and county is expected to experience impacts, which include increasing demands for housing, infrastructure and community services. The study area included Cascade, Glacier, Pondera, Teton and Toole Counties, Blackfeet Reservation and communities within each county.

Funding was secured from the US Department of Commerce Economic Development Administration (EDA), the State of Montana Department of Commerce, Big Sky Trust Fund, Glacier County Community Development Block Grant - Economic Development Program (CDBG-ED) funds and local public and private entities throughout the region.

## Objective

The project's purpose was to gather data that would not otherwise have been readily available from the private sector to assist in development and mitigation of potential infrastructure impacts. Conducting interviews with the public and private entities within each county identified the transient, permanent employment and subsequent impacts on resources. The data collected provided planning estimates that would determine the number of new permanent housing structures, rental housing, impacts to infrastructure and potential upgrades to infrastructure systems and facilities, and whether community services (police, hospitals, fire and schools) would need to expand.



Sweetgrass Development, in conjunction with Cascade, Glacier, Pondera, Teton and Toole Counties, collaborated with Kadrmas, Lee & Jackson, Inc. (KLJ) to conduct a regional impact assessment of anticipated growth in private businesses across the north-central Montana region. KLJ conducted interviews with local businesses, school districts, police/sheriff departments, fire departments, area hospitals and clinics, Emergency Medical Service (EMS) providers, public works directors and Montana Department of Transportation (MDT). Listed below is a breakdown of the interviews completed for the study. The interviews were compiled to assess impacts from private industry growth into the year 2020.

## BUSINESS SUMMARY

KLJ contacted 100 businesses to identify private employment trends throughout the region.

- » 64 of 100 businesses were interviewed
- » 9 declined to participate or were no longer in the area
- » 25 businesses did not respond or were unresponsive
- » 4 were asked to be emailed and have not responded

Utilizing information gleaned from business interviews, KLJ estimated the cumulative employment impact to be:

- » 1,491 permanent employees (at least two employers with more than 250 employment growth each, and one with an estimated 150

employment growth)

- » 313 temporary employees (classified as working less than 6 total months per year)
- » 1,804 total employment growth

## SCHOOL DISTRICT SUMMARY

KLJ contacted 31 school districts within the Sweetgrass region yet only 13 responded. KLJ concluded the following trends from interviews conducted to date.

- » Most schools reported having significant capacity to handle more students; with few facility upgrades needed
- » In at least three schools, there were some existing capital improvement projects that were put off because the cost of the improvements were not feasible with the current budget capacity of the school district
- » Student-teacher ratios generally ranged between 8 to 20 students per teacher, and were considered adequate from a staffing level perspective
- » Certain teaching positions, such as high school math and science teachers, tended to be harder to fill, but other positions, like elementary teachers were generally easy to fill
- » Space was not an issue as compared to the need for qualified teachers if growth were actually to occur; the challenge of retaining quality staff was a growing trend with declining enrollments in rural areas
- » Overall, school districts were in good shape, but had some difficulty meeting significant enrollment increases because of limited budget capacity

## POLICE/SHERIFF SUMMARY

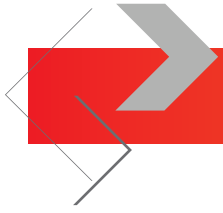
- » 5 of 5 sheriff departments responded.
- » 3 police departments responded.
- » In general, departments had fairly adequate and stable workforces. In one county there was an ongoing problem of turnover where deputies left to take better-paying jobs elsewhere. Dispatch and jail personnel were the most difficult positions to fill because of high turnover.
- » Overall, departments throughout the region appeared to have adequate facilities, although they were aging and would eventually need updating or replacement, especially if growth occurred.

## FIRE DEPARTMENT SUMMARY

The most consistent concern of fire departments was the increasing difficulty in finding or keeping volunteers. At least 11 departments noted that the number of volunteers was decreasing and the remaining volunteers were reaching the age where they should be retiring, but it was difficult to find younger replacements, so older staff are staying with departments longer. Other results were as follows:

- » Seven departments were operating with adequate or barely-adequate equipment, and would greatly benefit from newer equipment not prone to breakdowns. In some cases, there was a need for additional equipment beyond the replacement of aging trucks.
- » The cost of personal protection gear was a significant expense. The vast majority of volunteer-only departments noted that budget constraints made it difficult to adequately equip all the volunteers.





» Paid departments, such as Great Falls, noted that other than some planned future capital improvements, they were most likely able to meet growth demands.

## HOSPITAL AND CLINIC SUMMARY

Seven hospitals and medical clinics were interviewed within the Sweetgrass region. The major issue was staffing rather than having adequate facility space. Changes in staffing of medical doctors, para-professionals and nursing tended to fluctuate widely and the changes made staffing levels go from comfortable to very stressful with one or two staff leaving the clinics. Because the facilities were small, with the exception of Benefis in Great Falls, staffing remained tight; if a facility lost one or two staff, it translated to other employees covering shifts. If replacements are not found quickly, burnout could become a problem and as noted in an interview, “And the burnout factor may cause more staff to leave for a more stable working environment even if it is not in health care.”

Salary and benefits were not the key issue because the clinics essentially had to pay people well to recruit them. The burden of being on call at random times and for long periods of time tended to cause people to move on to a different job. It is important to note that all hospitals within the region – except for those in Great Falls – were critical access hospitals and thus provided only a limited set of healthcare services. A majority of the demand for service that could not be met by the critical access hospitals was met by the medical centers in Great Falls.

## EMS PROVIDERS SUMMARY

EMS providers were identified as an additional community service to be interviewed during a September 2014 Sweetgrass Board meeting. As such, KLJ only received one response from Glacier County. Glacier County stated that their EMS care is set to change in the next five years. EMS’s licensing board and other states have been working hand in hand to provide Integrated Mobile Health (IMH). IMH is generally described as providing home care to patients to stop the infiltration and overwhelming of emergency rooms, to keep patients healing in their own homes and to gear patient care to be maintained by a primary care provider. With the new changes, the EMS department is looking to expand operations and hire more than 10 additional staff in the next five years. Information for other counties was not provided because these are typically volunteer departments or staffed positions within existing medical facilities. As such, EMS providers for Cascade, Pondera and Toole County were included with the medical center reports. Teton County did not provide a response.

## PUBLIC WORKS/ INFRASTRUCTURE SUMMARY

Public works directors and city/county engineers were interviewed to assess the impacts of growth resulting from private employment increases and whether current systems – water, sewer and landfill – would be able to support growth. County

information is included in each county’s respective report, but the cumulative impacts are noted below.

The region would need more than \$62.75 million in water and sewer infrastructure improvements alone through 2020 to support growth and to fix limitations and issues with existing systems. The majority of improvements were needed for sewer systems upgrades and capacity improvements as new Montana Department of Environmental Quality (DEQ) standards were put in place.

Landfills throughout the region all had available capacity; 28 years was the shortest lifespan for an existing landfill located in Toole County.

## MDT AND TRANSPORTATION SUMMARY

MDT developed a yearly statewide transportation improvement program (STIP) identifying future improvement projects across the state. KLJ spoke with the MDT district engineer to gauge future issues facing the region as well as the STIP projects slated for development to ascertain if private sector growth would face transportation impediments.

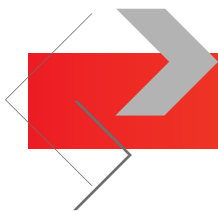
The region is expected to receive funding for 93 projects through 2017 to various transportation issues including widening highways, maintaining pavement and installing traffic safety devices. While no major issues were identified that would have impeded growth, MDT did note that working with MDT staff early in the planning stages for any project (regardless of public or private) would help to ensure needs are addressed and whether STIP funds could be programmed into the project.

The breakdown of the region’s infrastructure improvements include:

- Sewer improvements: \$36.6 million
- Water improvements: \$26.1 million

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## Impact Summary

KLJ analyzed data on the regional level for the five-county study area to determine impacts from estimated population growth, housing needs and employment projections including data provided by private businesses regarding anticipated employment growth. The following information is a summary for the region to assist in analyzing strategies to accommodate and mitigate growth through year 2020.

## Population

As shown in the following figures, population estimates were projected to increase to more than 116,000 people which is similar to the population the region experienced in the late 1970s. Cascade County had the vast majority of population within the region as a result of the Great Falls metro area.

As evidenced from interviews, it was estimated that approximately 1,800 jobs will be added to the region and assuming each job earner has an average household size of 2.31, then approximately 4,167 people would potentially move into the region. However, because not all job earners will come from outside the region, and because migration of workers can vary greatly from within the region it is anticipated that approximately half of the permanent workers (700) will relocate to the region from outside the area resulting in approximately 1,600 new residents..

A detailed migration study would be needed to determine specific population trends resulting from the economic

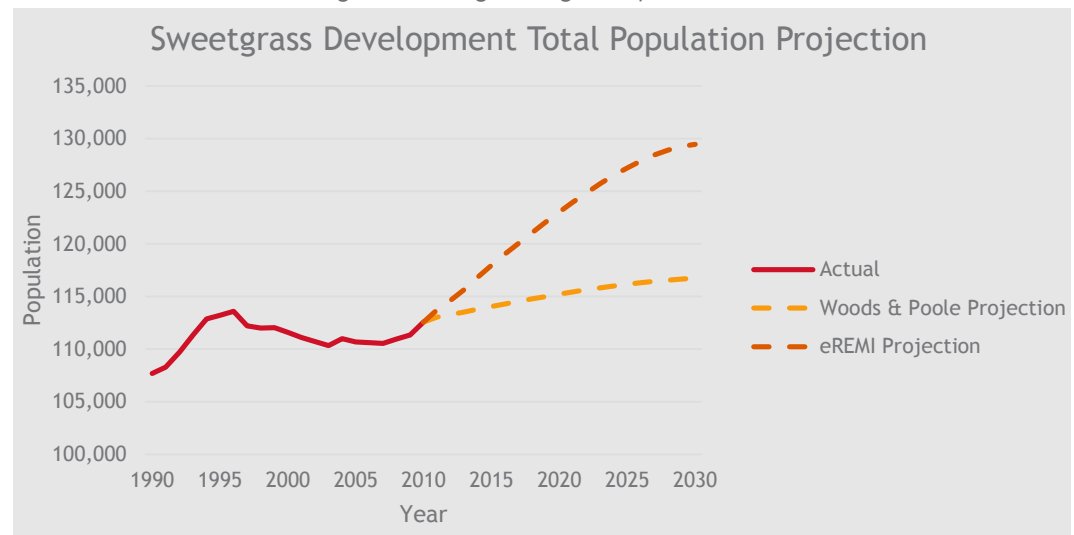
impacts detailed in this study; however, using data provided by the Montana Department of Commerce, KLJ concluded that the Sweetgrass Region is expected to add more than 1,000 people by year 2020 and nearly 3,000 by year 2030.

## Employment

Of the 64 businesses interviewed, the region is expected to add more than 1,804 total jobs to the region; 1,491 are estimated to be permanent employees and 313 are estimated to be temporary employees – employees that either work seasonally or for less than six months during the year. If permanent jobs were extrapolated using a conservative job multiplier of 0.3, then an additional 450 secondary jobs would be created for a total of more than 2,250 jobs. While most businesses interviewed were

unable to provide concrete numbers on the type of jobs added (machinist, administrative staff, engineer, etc.), KLJ was able to use data provided by Woods & Poole to cross-reference the data gathered from businesses interviewed to help determine if information obtained was in line with future forecasts. Data obtained indicated the Sweetgrass region is expected to add approximately 2,200 new jobs by 2020 and nearly 7,000 new jobs by 2030. The numbers supported the data collected from private businesses in the region, although the local interviews tended to be more realistic of employment gains through the year 2020.

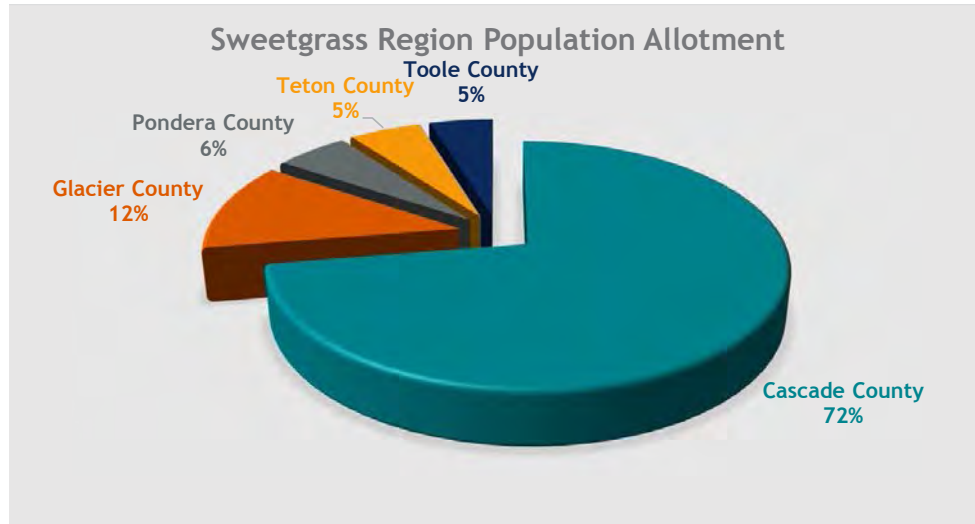
Figure 1: Sweetgrass Region Population Trends



Source: Woods & Poole

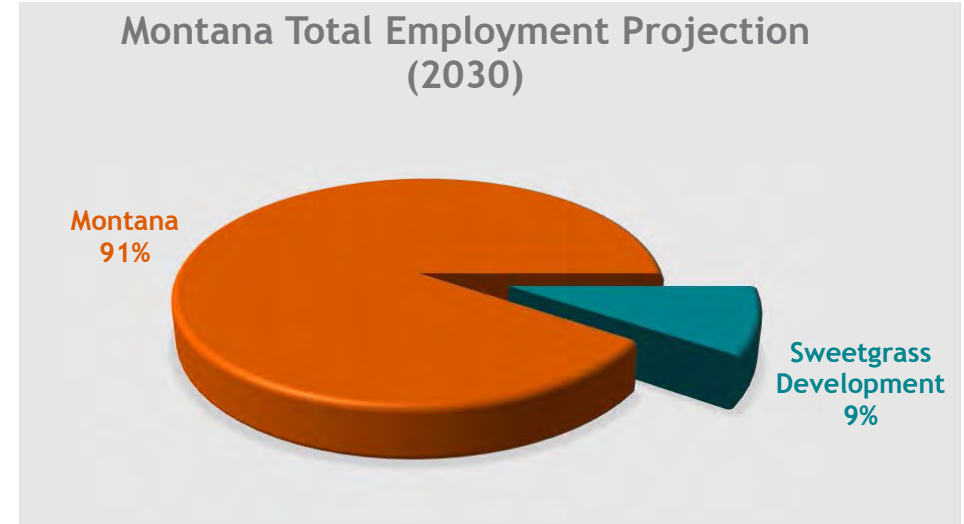
# SWEETGRASS REGION

Figure 2: Sweetgrass Region Population Allotment (2010)



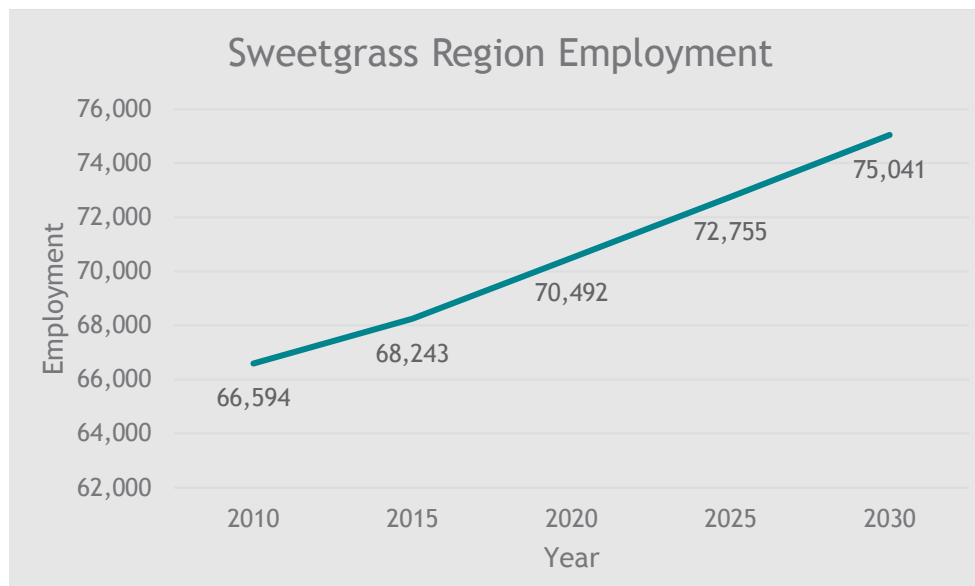
Source: US Census

Figure 4: Montana versus Sweetgrass Region Employment (2030)



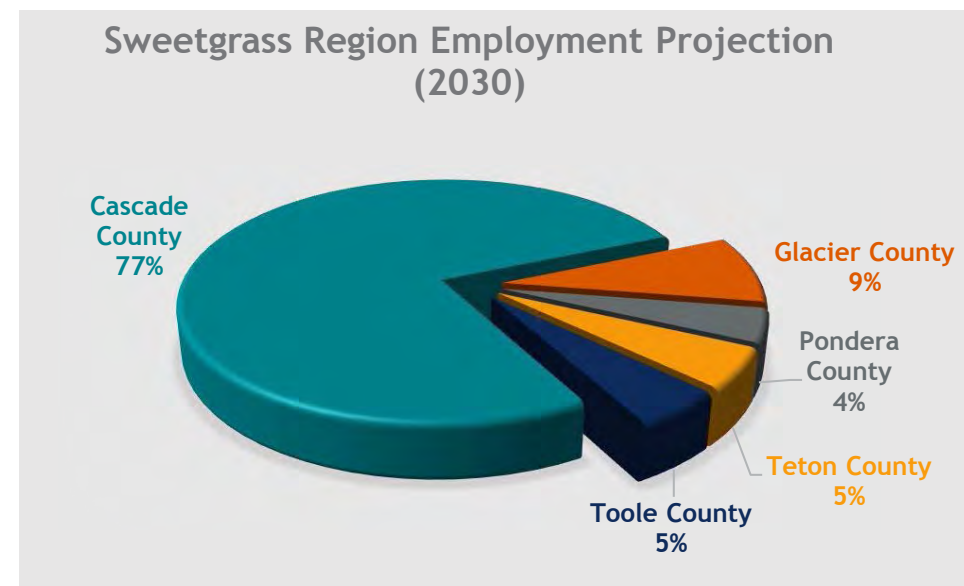
Source: Woods & Poole

Figure 3: Sweetgrass Region Employment Forecasts



Source: Woods & Poole

Figure 5: Sweetgrass Region Employment Projection (2030)

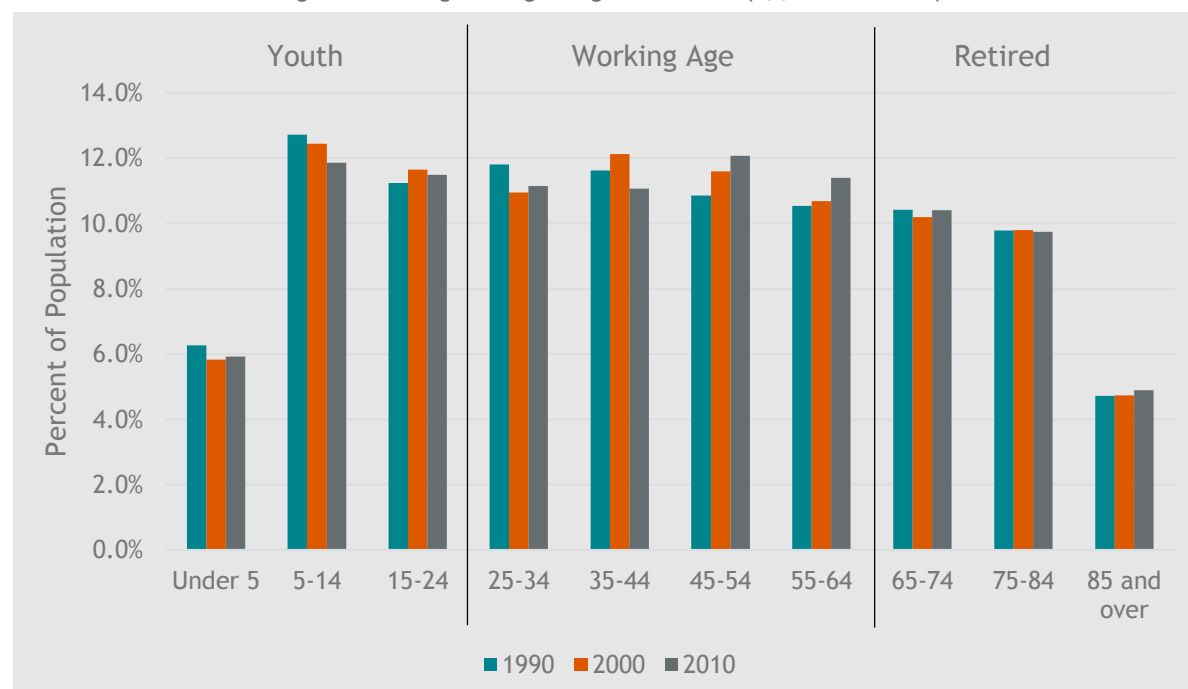


Source: Woods & Poole

Personal income is expected to rise incrementally and is expected to be well below that of the rest of the United States. The Sweetgrass Region is expected to have higher incomes than the rest of Montana indicating that the region tends to have higher-paying jobs than other areas of Montana. In addition, with the exception of Glacier County, all other counties are expected to have higher personal incomes than Montana as a whole.

More than 35 companies interviewed stated that employee hiring and retention were the greatest concern with expanding operations, but wages from other industries such as those in the oil field in eastern Montana and Canada were affecting their ability to hire. Moreover, businesses would have been willing to pay higher salaries if potential job seekers had necessary skills; which was evidenced in the projected increases in personal income in the Sweetgrass Region.

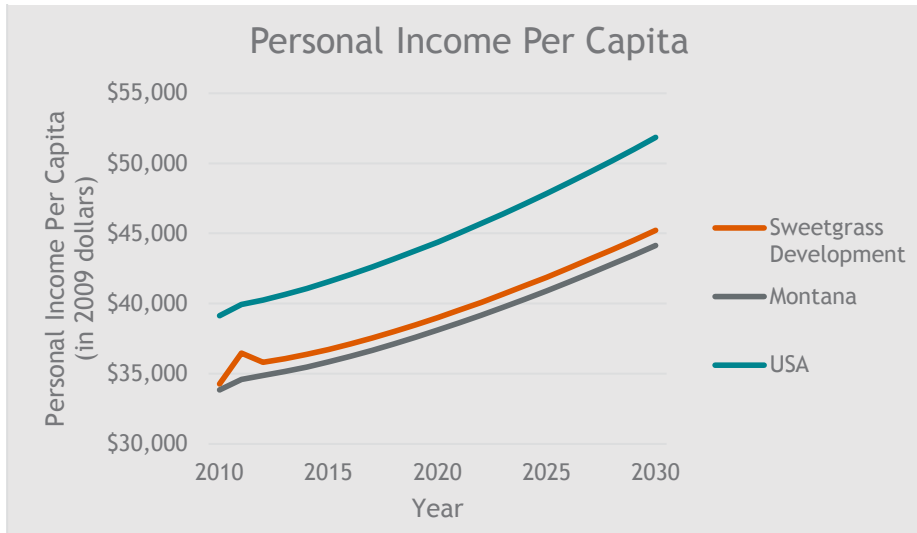
Figure 6: Sweetgrass Region Age Breakdown (1990, 2000, 2010)



Source: Woods & Poole

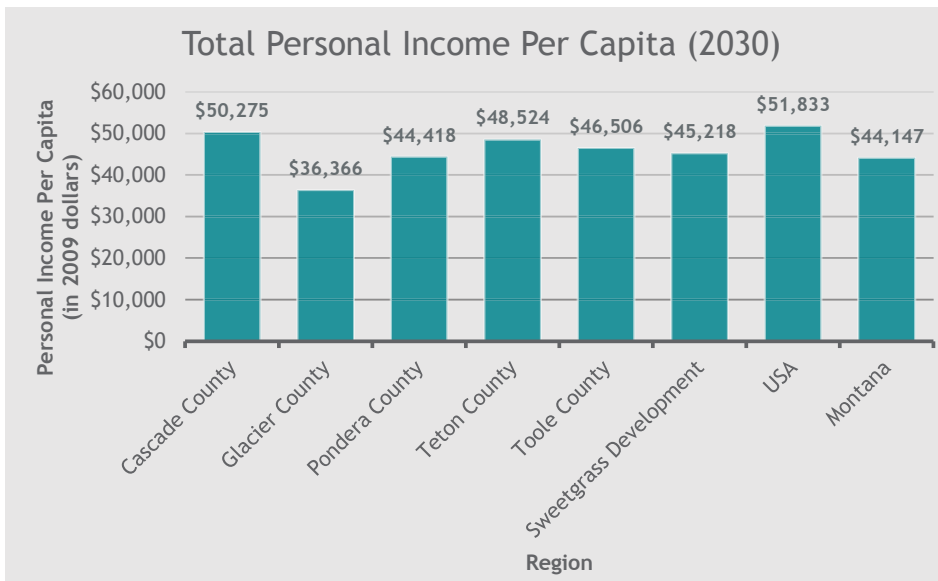
# SWEETGRASS REGION

Figure 7: Personal Income per Capita Comparison



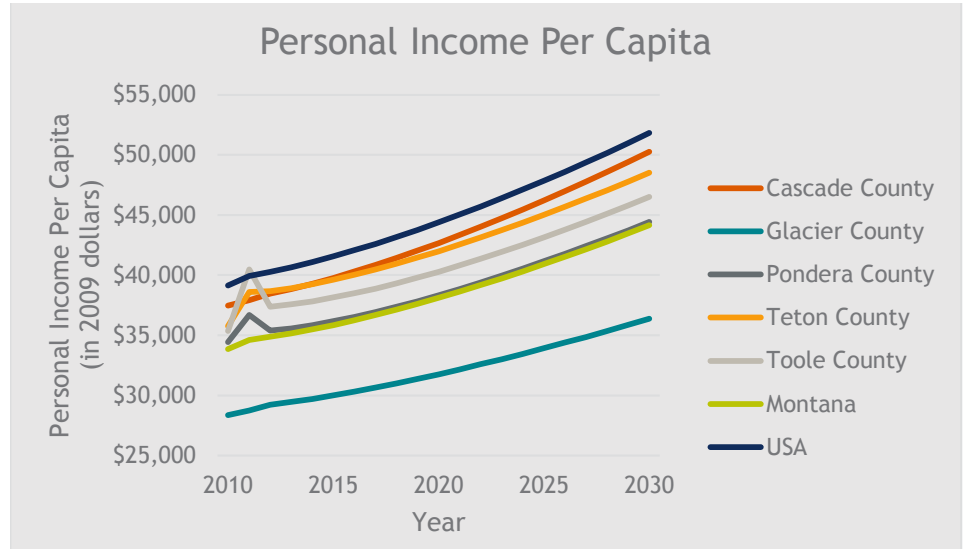
Source: Woods & Poole

Figure 8: Personal Income per Capita by County



Source: Woods & Poole

Figure 9: Personal Income per Capita Projection



Source: Woods & Poole

## Housing

Housing was identified as the top issue employees faced when trying to relocate to the Sweetgrass Region. Businesses located in rural communities tended to report more issues with employees finding affordable and middle-income housing (\$150,000 - \$200,000 range) versus businesses located in urban settings such as Great Falls or Choteau.

Using the information obtained from interviews and data provided by the Census and Economic Information Center (CEIC) and Montana Department of Commerce, KLJ estimated the region would need between 1,100 to 2,000 new residential units through the year 2020



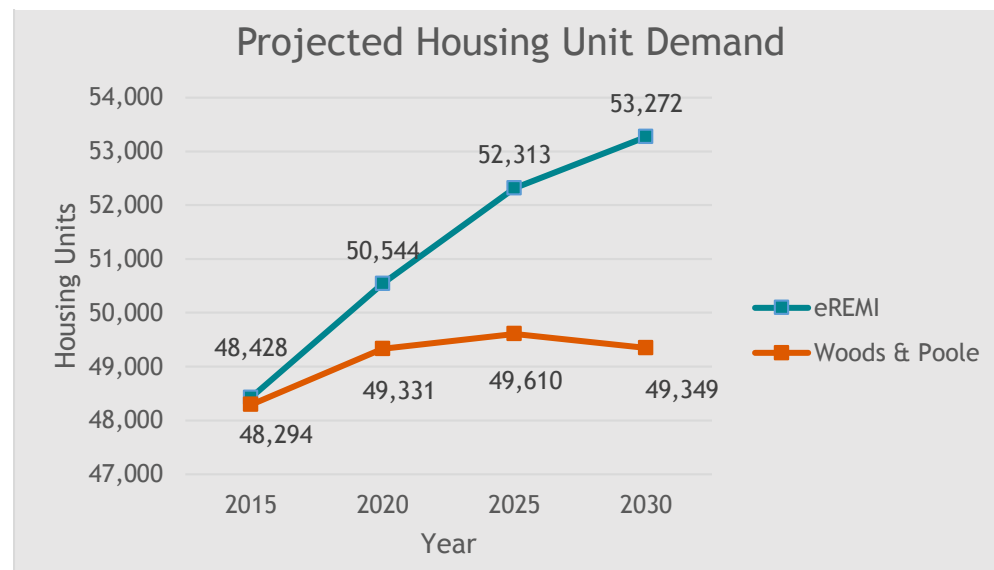
to accommodate private business growth, as well as to replace more than 12,000 units in poor condition located throughout the region.

Additionally, using data from Woods & Poole, KLJ was able to estimate the housing unit demand through 2030. While the numbers varied greatly, it was estimated that between 1,000 and nearly 5,000 new units will be needed to accommodate population growth in the region. If units in poor condition are included, the number of housing units needed to support growth and replace deficient structures increases to 13,200 to 17,200 units, or more than 880 units per year to keep pace with demand.

When asked about the type of housing employees needed, most businesses responded with mixed results ranging from single-bedroom apartments to multifamily complexes. However, the vast majority of employers stated that quality and affordable single-family homes were what most employees preferred. More than 10 businesses interviewed (20 percent) noted that they lost potential employees because the employee could not find affordable single-family homes, and thus took jobs elsewhere.

While affordability appeared to be a significant issue for some counties, KLJ addressed affordability with each county's respective housing section as the affordability trends varied from one area to another.

Figure 10: Sweetgrass Region Projected Housing Demand



Source: Woods & Poole

Table 1: Sweetgrass Region Unmet Housing Needs

2030 Sweetgrass Development		
	Renter	Owner
Cascade County	4,007	5,006
Glacier County	671	856
Pondera County	208	426
Teton County	128	480
Toole County	146	286
Total with Unmet Needs	5,160	7,054
		Total Unmet Housing Needs
		12,214

## Infrastructure

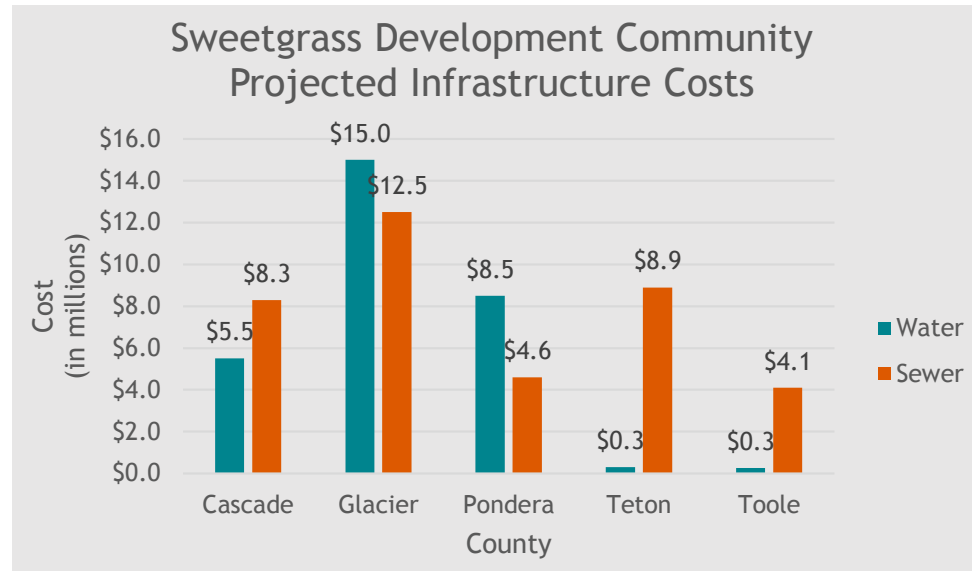
Infrastructure development was assessed to determine whether existing systems such as water, sewer and landfills could support potential employment growth and housing demand. Each county's specific assessments are included in more detail in their respective sections; however, the overall estimates obtained from input from public works departments and engineers across the region are listed.

The region will need more than \$62.75 million in water and sewer infrastructure improvements alone through the year 2020 to support growth and to fix limitations and issues with existing systems.

- » Approximately \$36.6 million in sewer upgrades will be needed to support future growth
- » More than \$26.1 million in water upgrades will be needed as well

Public works departments and engineers also noted that while some towns would be able support growth through the year 2020; systems may require upgrades to accommodate new residents depending on how much growth occurs. Most departments were unable to quantify the expected infrastructure needs more than five years in advance. They cautioned KLJ that forecasting beyond 5-year capital improvement programs (CIPs) becomes an issue because city and/or county staff simply don't know which structures or systems will need to be replaced, nor can staff predict which systems may fail or need immediate funding pending emergency situations.

Figure 11: Sweetgrass Region Infrastructure Costs



KLJ coordinated with MDT to identify issues and needs for the Sweetgrass Region. The following table is a summary of the planned improvement projects. The majority of projects listed cost less than \$1 million and include various items such as mill and overlay treatment, shoulder widening and other maintenance tasks. The larger items, such as left turn installation and traffic lighting, are listed as more expensive (\$1- \$5 million). A complete breakdown of specific improvements is listed in each county's assessment profile.

MDT also noted that while transportation improvements in this region would increase mobility throughout the five-county area, some areas including rural highways may need additional improvements if businesses locate near them. MDT encouraged businesses and private investment to occur where MDT was already planning

improvements to better utilize funds; however, if specific roads or corridors would have substantial investment from businesses' expansion, MDT would like to know as soon as possible so they could program potential improvements into the STIP.

## Community Services

### LAW ENFORCEMENT

Four of the five counties reported inadequate staffing levels for either law enforcement personnel, support staff, or both. In one county there was an ongoing problem of turnover where deputies left to take better-paying jobs elsewhere. It is important to note that the smaller counties were not able to provide the wage and benefit levels that Cascade County did, and were thus prone to turnover. In other counties, dispatch or jail

Table 2: MDT STIP for Sweetgrass Region

STIP Cost Estimate			
County	# of Projects costing less than \$1 million	# of Projects costing \$1 million to \$5 million	# of Projects costing greater than \$5 million
Cascade	44	6	5
Glacier	22	2	5
Pondera	10	0	0
Teton	11	0	2
Toole	6	3	0
Sweetgrass Total	93	11	12

Table 3: Law Enforcement Needs

Law Enforcement Summary					
County	Law Enforcement Staff Level	Support Staff Level	2010 County Population	LE Staff Per Capita	Largest Issue
Cascade	35 FTE	85 FTE	81,327	2,323/LEO	staffing
Glacier	13 FTE	13 FTE	13,399	1,030/ LEO	staffing
Pondera	8 FTE	3 FTE	6,424	803/LEO	n.a.
Teton	10 FTE	4.5 FTE	6,073	607.3/LEO	n.a.
Toole	14 FTE	8 FTE	5,324	380.3/LEO	staffing

staffing was greatly needed to appropriately meet the demand. Overall, sheriff's departments appeared to have adequate facilities, although many of the facilities were aging and would eventually need updating or replacement.

Very limited information was available about costs for facility improvements, staff training and equipment, and annual wage and benefit costs for additional staff. Based on limited data, it seemed likely that within the study area

there was a need for between 20-30 additional staff with a total annual additional wage and benefits cost of between \$1.5 to 2.4 million. In addition, the cost to train and equip staff is also a significant expense, and adding the additional staff could have an aggregate ancillary cost of up to \$2.25 million in training and equipment costs.

## FIRE DEPARTMENTS

Fire departments in the region were short on volunteer staff, worked with aging or inadequate equipment, and

in some areas had significant communication problems that impeded the ability to respond effectively. Based on the responses obtained from the telephone interviews, the following statistics seem representative of the fire departments in the study area:

- » 60% had volunteer staff shortages or turnover problems
- » 75% needed to add or replace fire fighting vehicles at a cost that exceeded \$3.95 million
- » 1 fire department reported that they should replace all of their emergency vehicles because of their extreme age – the cost to do so would most likely have doubled or tripled the amount of funding needed for adding or replacing fire fighting vehicles listed above
- » 30% had other equipment needs with an estimated price tag of more than \$100,000
- » 25% had inadequate fire stations with an estimated cost of more than \$1.7 million
- » 20% reported significant communication problems that prevented adequate emergency response
- » 25% reported significant community growth

Like many volunteer organizations, volunteer fire fighting groups each have their own identity and history that influence their current standings. Most are typically able to function with what they have, but would substantially be improved if funding was adequate. Coordination and mutual support varied greatly between counties, yet each department had a strong individual identity.

It was suggested that there may be benefit in changing the structure of fire departments' operational management and financial resource base. This could come at the expense of the volunteer base that is the backbone of firefighting in the region. Thus, any potential change in structure would need to be carefully approached.

With the limited water availability and heavily forested rural areas, a need arose to educate people on proper rural site development to help protect against wildland fires. One fire department in Cascade County had recently closed for lack of volunteer support.

### SCHOOLS

Enrollments were typically stable or decreasing slowly. Impacts from oil and gas exploration had been short-lived or not experienced at all. Most communities were either stable or slowly declining in population, but a frequent problem was the lack of housing. This limited the amount of potential new residents to a community, the availability of housing to help attract teachers, and often encouraged people to move to larger communities – Great Falls – where housing opportunities were better.

Student-teacher ratios typically were between 10:1 and 20:1. Almost all schools reported limited turnover but significant problems with recruitment, especially for special education, math, science and several other high school teaching positions.

Available facility capacity typically was 30-50 percent more than current enrollment. Facilities were typically aging and in need of refurbishment or significant upgrades. Outside of Great Falls, specific facility projects

identified ranged in scale from minor kitchen or locker area improvements (\$10,000) to a new gymnasium (\$1.5 million). Frequently, there were specific projects recognized as being needed at some point in time, but no specific cost estimates were available for the projects. Extrapolating limited information on facility project costs was little more than a guess, but it seemed likely that there is in excess of \$4 million in projects needing to be done outside of the Great Falls School District.

### HOSPITALS, CLINICS AND EMS

Regarding hospital licensing, which is a state level function with federal medical facility guidelines, there are several different classes into which hospitals may be categorized. For context it is important to note there were seven hospitals in the Sweetgrass study area, and these hospitals fit into three or four different classifications. It is also important to recognize that there are different performance indices applicable to different types of settings where hospitals provide services. The three general settings were: urban, rural and frontier.

Rural healthcare needs often stem from the lack of available practitioners more than from the need for facilities. The effort to address this staffing shortage had been ongoing at least as far back as 1972. Several studies and reports have highlighted this ongoing concern. A 2009 report titled *Montana's Primary Care Workforce* by Saul M.J. Rivard summarizes the issue as follows: "As a state and nation, we are not prepared for the health workforce shortage. Healthcare reform will put new demands for a primary care workforce. Retirements and the aging of the population will increase demand. Lack

of faculty hampers expansion of programs. Montana should commission a state study of healthcare workforce needs and strategies for assuring an adequate workforce in the future."

In addition to interviews with senior level hospital administrative staff, this report summarizes data from three other relevant sources:

- » National data compiled on Health Professional Shortage Areas (HPSAs)
- » Medical Center or County Healthcare assessments based on surveys of residents in the local service area
- » Secondary data compiled by the Office of Rural Health at Montana State University

The Health Professional Shortage Areas data was likely the most systematic way to assess healthcare staffing needs in the study area. These data were compiled for three different categories: primary care, dental care and mental health care. Overall, based on recent data at the time this report was prepared, there were 32 current HPSAs in the study area. Cascade and Glacier County each had a total of 11 HPSAs. Pondera and Toole County had three each, and Teton County had four.

Review of Community Healthcare Assessment data based on surveys of the residents of the local service area provided some additional insights into healthcare issues in the study area. Very similar survey formats were available for Glacier, Pondera and Toole County. Only limited data was available from Teton County, and Cascade County reported data in a format that made it

less directly comparable. The main observations from these assessments are as follows:

- » When asked about the overall level of health in the survey area, more than half of the Glacier, Pondera, and Toole County respondents indicated they considered it to be “somewhat healthy” and in general, respondents considered the level of health to be worse than the previous survey completed four years earlier. Cascade County respondents to a related question were split almost evenly between those thinking the levels were healthy or not healthy. Data from Teton County was not available.
- » When asked about delaying or not receiving medical services, approximately one-third of the respondents in Glacier, Pondera and Toole County respondents indicated this to be the case sometime in the last three years. For a similar question, nearly two-thirds of Teton County respondents indicated this to be the case. It should be noted that these responses indicated an increase in not receiving services over the previous survey completed four years earlier. No similar data was available for Cascade County.
- » When asked about having feelings of depression for three or more consecutive months sometime in the last three years, 13 percent of Toole County respondents, 18 percent of Pondera respondents and 23 percent of Glacier County respondents indicated they had. No similar data was available for Cascade and Teton Counties.
- » When asked about the top health concerns in the survey area, respondents from all counties indicated alcohol/substance abuse, obesity and cancer as the top concerns. The order of priority for these three concerns varied from county to county.

Changes in staffing of MDs, para-professionals, and nursing tended to fluctuate significantly, and these changes could make staffing levels go from comfortable to very stressful with what may have seemed like minor changes. Essentially, because most of the facilities in the region were small facilities, professional staff tended to be difficult to attract, find and hire. As noted in an interview: “If you lose one or two [nurses] it means that the remaining staff have to cover, and if replacements don’t happen fairly quickly this can lead to burnout. And the burnout factor may cause more staff to leave for more stable working environments.”

Salary and benefits were not the key issue because hospitals typically needed to pay people well to encourage them to relocate to the region. Putting in extra time and having the burden of being on call so often tended to cause people to move on to a different job.

It is important to note that all hospitals interviewed outside the Great Falls area were critical access hospitals and thus provided only a limited set of healthcare services. Much of the demand for service which could not be met by the critical access hospitals was met by the medical centers in Great Falls.

Three of five EMS providers in the Sweetgrass Region responded to interviews. Several EMS providers rely on volunteer staff and have only one or two paid, full-time positions making it difficult to respond to interview requests. Glacier County EMS stated that they would need an additional 11 staff in the next five years to respond to increasing requests for medical services. Pondera and Toole County EMS services are provided through each

county’s hospital and are included in the overall impacts noted in the hospital and clinic summaries. Cascade and Teton counties did not respond to interview requests although each respective county does have EMS providers.

Overall, EMS will face similar issues that hospitals and clinics noted in their respective interviews. Staffing is projected to be the largest issue facing EMS services, especially in Glacier County, and attracting qualified volunteers with first-responder training is becoming more difficult. Replacing ambulance vehicles is projected to be the largest capital expense moving forward. All three EMS providers interviewed stated that funding from counties will be essential to retain existing levels of service and to respond to increasing demand if growth occurs.

## Strategies

- » Sweetgrass Development should coordinate large-scale regional planning efforts to support potential business expansion through job training programs, employee recruitment fairs and a one-stop-shop for job listings in the area.
  - » Current websites lacked a regional emphasis on specific jobs in the area.
- » Collaborate with colleges and universities to develop specific job-training classes and programs to accommodate new and existing business needs such as diesel mechanics, welders, accountants and engineers.
- » Work with local high schools to develop job shadow and apprentice-type programs for skilled labor jobs;

businesses noted a severe shortage of qualified candidates.

- » Develop new policies at the local level to address housing affordability and shortages; specifically implement zoning codes such as inclusionary zoning, density bonuses and funding stream revenues to encourage affordable housing.
- » Prepare city and county owned land maps to assess whether such lands could be used to develop workforce housing for city and public staffs including school employees; eastern Montana (Lambert, MT) had implemented such strategies to help attract quality teachers to the area.
- » Develop preliminary engineering reports to support the need for upgrading infrastructure and submit such reports on time to the State of Montana for review and potential funding.
- » Develop capital improvement plans to begin planning for future growth and upgrades to existing facilities where needed; having such documents would greatly benefit city and county officials for planning needs, and would make grant applications much more competitive.



## Overview

Cascade County encompasses Great Falls, the economic hub for the five-county Sweetgrass Region and includes smaller cities and towns. As noted earlier, jobs were assigned to each county based on where the headquarters or primary business office was located for each company interviewed and does not necessarily reflect the actual distribution of job growth throughout the region. However, assigning job numbers was crucial to estimate impacts and to determine if employment and population forecasts were in line with separate data entities such as Woods & Poole and eREMI.

## Impact Summary

Cascade County is expected to have the largest impact of the five-county area with more than 1,098 potential jobs either relocating to the area or being created from the private sector through the year 2020. The largest employer estimated that more than 350 jobs would be created through year 2020 and that the majority would occur by the end of 2016. Another two businesses identified a potential need of more than 400 employees through the next two years, but those numbers would decrease to 150-200 employees afterward (year 2017-2020).

The estimated employment growth for the County through 2020 includes:

- 873 permanent jobs
- 225 temporary jobs
- 1,098 total jobs

Employers and businesses noted the greatest needs for future workforce was specific training programs in fields such as diesel mechanics, welding, accountants and truck drivers for Cascade County. While retaining employees was a concern for the majority of employers, the top issue was attracting high-quality workers with skill sets to fill a job immediately. One employer stated, "If I could find the right employee – someone who works hard, is willing to be trained and I know he or she will stay, then I'd begin training them right now. However, we can't find enough qualified people with basic skills for me to begin doing that."

The greatest impact to infrastructure was estimated to be waste water systems in all local jurisdictions, including Great Falls, as new DEQ requirements would cause systems to be upgraded in addition to the potential impact from private job creation. Housing is, and will continue to be, single biggest issue facing residents in Cascade County as the County is forecasted to need between 660-1,900 new housing units to accommodate projected population growth. This estimation did not include the deteriorating structures rated as "poor" condition by Montana Department of Commerce; however, if included, the County would need more than 1,900 additional housing structures created or renovated.

Community services expecting the largest impact were hospitals and EMS services. Current EMS services in Cascade County were understaffed and hospitals, while able to support new patients with space, were having difficulty attracting and retaining doctors and

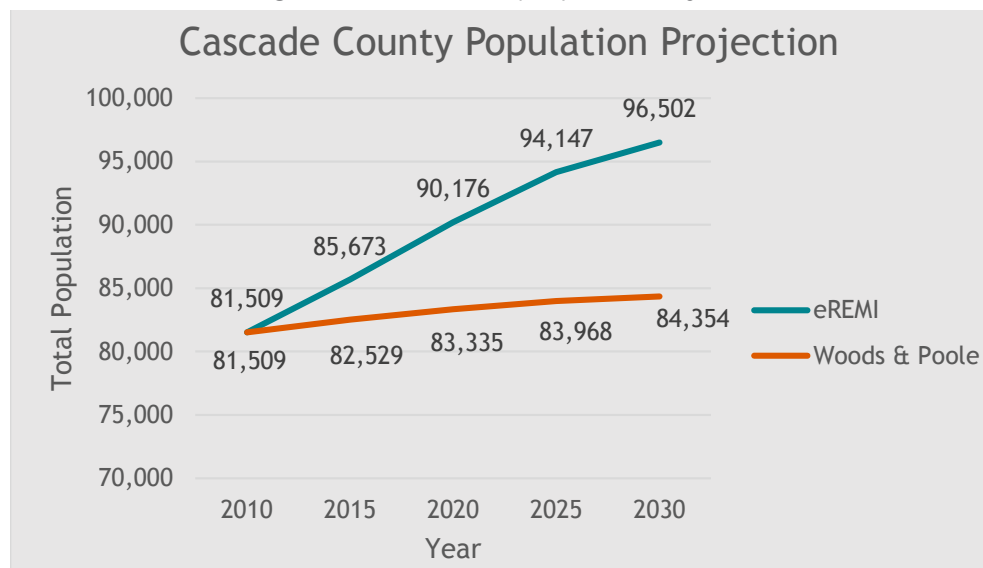
nursing staff. Support staff was not identified as an issue. Schools, police and fire – while not identified as a pressing concern at the time – did note that if growth were to substantially occur, those services would need additional staff before new "brick and mortar" resources (buildings, vehicles, etc.).

## Population

Cascade County is projected to add between 800 and 4,500 new residents between 2015 and 2020, depending upon which data source is referenced. Woods & Poole data tends to analyze past trends and project those using conservative models, while eREMI is a state-based population model distributed by the Montana Census and Economic Information Center that utilizes localized trends. While the impacts vary greatly between adding less than 1 percent to more than 5 percent through the year 2020, the difference is more staggering in year 2030 where the difference is more than 12,000 people. At the time this report was prepared, it was impractical to theorize what might happen in the next 15 years, but planning for an impact of more than 12,000 people requires substantial planning at the regional level and would require significant coordination between city and counties to accommodate potential impacts.

# CASCADE COUNTY

Figure 12: Cascade County Population Projections



Source: Woods & Poole, Montana Department of Commerce

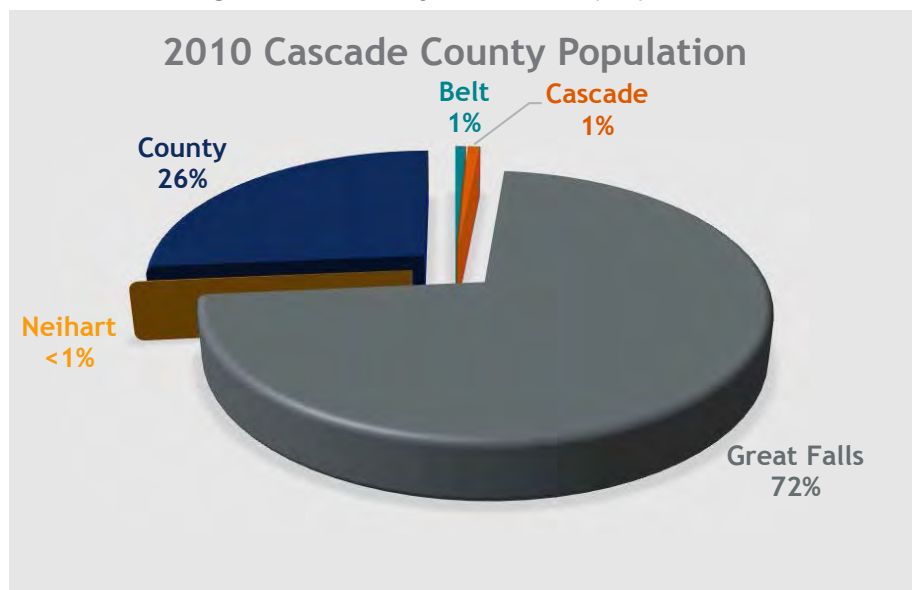
With the exception of Great Falls, all communities, including the County have shown declining populations from the last decade, which contradicts what happened during 1990-2000. As such, it is extremely difficult to forecast and allocate future county-wide population projections to individual communities. However, if trends continue as is and as evidenced from national data showing urban areas growing faster than rural areas, then Great Falls will continue to attract more population and rural communities may experience declining populations. As indicated in business interviews, several companies plan to expand operations and hire more individuals in the Great Falls area; however, no company expressed concerns of decreased business or needing to reduce staffing levels.

Table 4: Population Growth Trends (1970-2010)

City	1970	1980	1990	2000	2010
Cascade County	81,804	80,696	77,691	80,357	81,327
Belt (Town)	656	825	571	633	597
Black Eagle CDP	--	--	--	914	904
Cascade (Town)	714	773	729	819	685
Fort Shaw CDP	--	--	--	274	280
Great Falls (City)	60,091	56,884	55,125	56,690	58,505
Malmstrom AFB CDP	--	--	--	4,544	3,472
Neihart (Town)	109	91	53	91	51
Simms CDP	--	--	--	354	373
Sun Prairie CDP	--	--	--	1,772	1,630
Sun River CDP	--	--	--	131	124
Ulm CDP	--	--	--	764	738
Vaughn CDP	--	--	--	701	658
Remainder of County	--	--	--	12,665	13,329
<b>New Census Designated Places</b>					
Gibson Flats CDP	--	--	--	--	199
Sand Coulee CDP	--	--	--	--	212
Stockett CDP	--	--	--	--	169

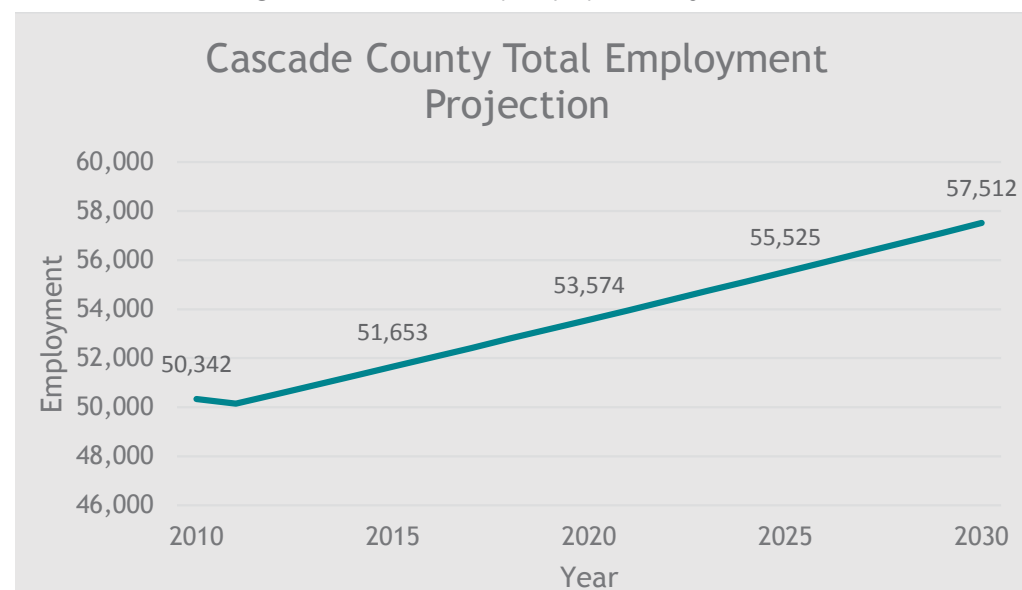
Source: Great Falls Growth Policy, 2013

Figure 13: Allocation of Cascade County Population



Source: US Census

Figure 14: Cascade County Employment Projections



Source: Woods & Poole

## Employment

Employment within Cascade County is expected to increase nearly 3,000 jobs through 2020, which is more in line with the eREMI population projection of 4,500 people through 2020. While KLJ interviews concluded that nearly 1,100 jobs would be added through with 873 being permanent jobs and 225 being temporary, it is estimated that at least 1,000 jobs would be created with the potential for up to 3,000 jobs as projected by Woods & Poole data.

Cascade County is by far the fastest-growing county with Great Falls as the economic hub for north-central Montana. Data provided by Woods & Poole, as well as information obtained from interviews, points to a steady hiring trend and employment growth through the year 2020. While

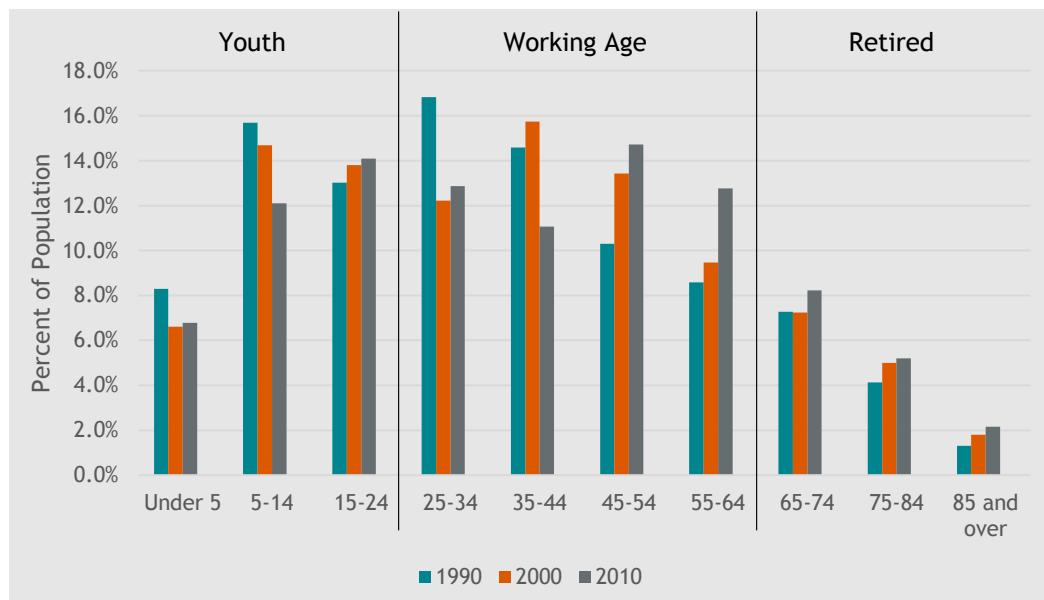
employment projections are difficult to predict, Great Falls/Cascade County has added approximately 1,782 jobs between October 2012 and October 2014. Several new businesses in Great Falls are currently expanding and the new facilities with future jobs opportunities are expected to be completed in 2015. Businesses are looking to add people, especially young professionals and middle-aged employees, as the baby-boomer generation begins retiring from the workforce. This was one of the greatest concerns for businesses moving forward in that the next five years will likely bring about substantial employment shifts in terms of working age professionals and backfilling roles with qualified personnel.

The working age of young professionals (25-34) rebounded from the last decade, yet working professionals (35-44)

has dropped significantly. Executive professionals (45-54) and senior professionals (55-64) have both risen through the past decade, indicating what businesses expressed during interviews: that young professionals with skill sets are difficult to attract while more experienced workers tended not to apply for skilled jobs companies were looking to fill at the time this report was prepared. It should be noted that Cascade County's workforce was rebounding from 2000 and the Great Recession as evidenced in employment projections from Woods & Poole. Additionally, more than 18 businesses interviewed in Cascade County expressed plans to expand operations in the county or central Montana and more than 41 businesses interviewed in central Montana expressed plans to hire staff through the year 2020.

# CASCADE COUNTY

Figure 15: Cascade County Age Breakdown (1990, 2000, 2010)

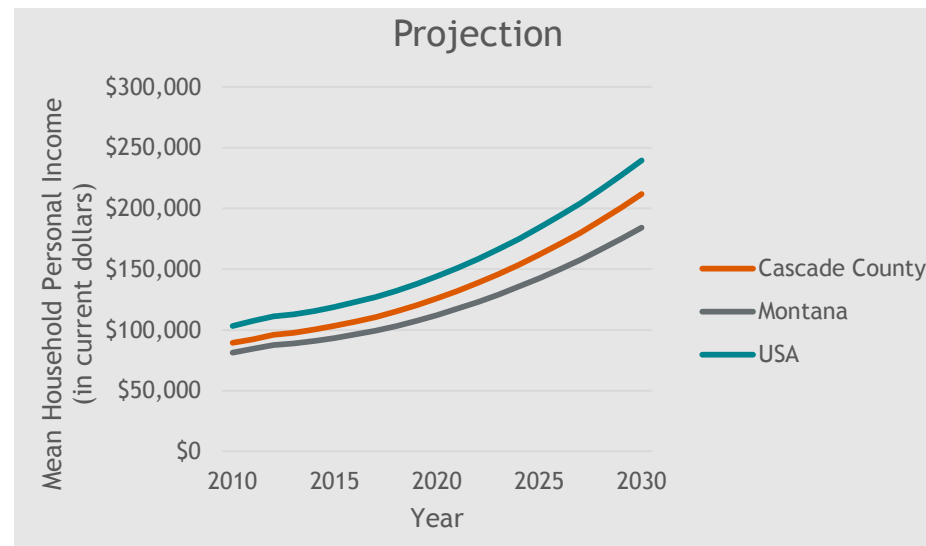


Source: Woods & Poole

Earnings potential and personal incomes for workers within the county are expected to steadily increase through 2030, indicating that workers will continue to receive high wages for work performed especially after 2025. Cascade County is projected to be above Montana as a whole for the average income per capita (nearly \$6,000 more) and average household income (more than \$10,000) for year 2020.

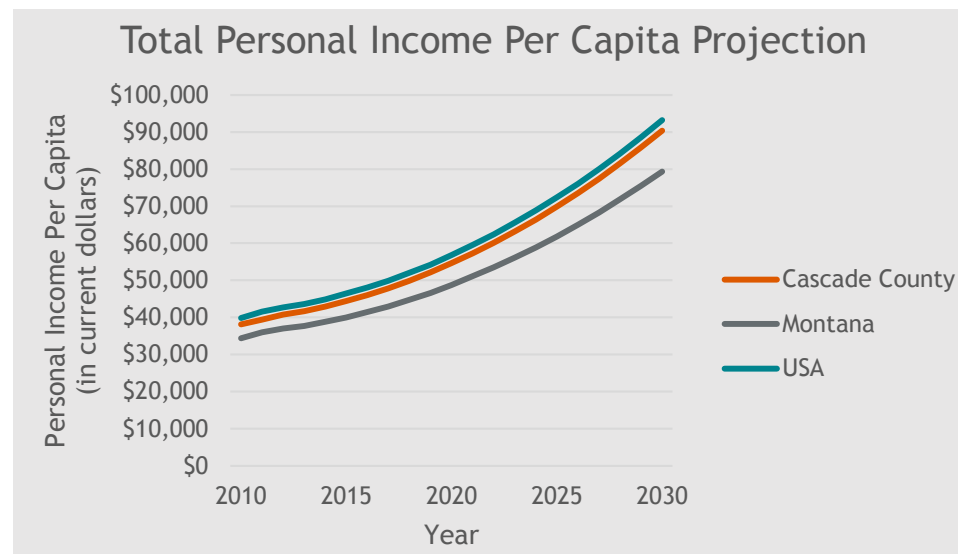
While the regional economy is undoubtedly complex, the two largest employment sectors in the Great Falls area are health care and government/military, both of which contribute to the above average incomes for Cascade County.

Figure 16: Personal Income per Capita Projections



Source: Woods & Poole

Figure 17: Household Total Personal Income Projections



Source: Woods & Poole

## Housing

Housing was the greatest impediment to future growth for businesses in terms of hiring staff, as more than 60 percent of businesses interviewed in Cascade County stated that employees had a difficult time finding quality housing. High-quality housing with amenities was often described as future needs rather than affordable option, although affordability was mentioned in several interviews.

Multiple sources of information were used to determine housing needs for Cascade County, including existing studies from the Department of Commerce, as well as KLJ analysis for potential new units to address growth and deteriorating structures.

As evidenced in the following tables and figures, Cascade County's housing is affordable for most professions; the only professions where homeownership affordability becomes an issue is for retired persons, disabled workers and retail salespersons. However, these three groups are estimated to be able to afford a manufactured home and only retired persons and disabled workers are not able to afford a one-bedroom, fair market rental unit. A large percentage of housing stock in Great Falls is old and sub-standard or not to code. The perception in the community is that individuals searching for a house in the more than \$250,000 range will be buying an old, overpriced house that needs substantial repairs.

Table 5: Cascade County Housing Affordability

Affordable Share of Income for Housing Various Occupations						
Select Occupations	2008			2010		
	Annual Income	Affordable Home Cost	Affordable Monthly Rent	Annual Income	Affordable Home Cost	Affordable Monthly Rent
2008-2012 Median Household Income	Not available			\$42,389	\$177,865	\$1,060
Average all Occupations	\$32,775	\$110,244	\$819	\$34,577	\$145,068	\$864
Registered Nurse	\$56,377	\$189,633	\$1,409	\$59,926	\$251,451	\$1,498
Police Officer	\$46,120	\$155,132	\$1,153	\$49,708	\$208,576	\$1,243
Elementary School Teacher	\$41,776	\$140,520	\$1,044	\$41,477	\$174,038	\$1,037
Retail Salesperson	\$25,907	\$87,142	\$648	\$25,293	\$106,130	\$632
Disabled Worker, SSI	\$11,856	\$39,880	\$296	\$11,825	\$49,616	\$296
Senior on fixed-income, SSI	\$13,090	\$44,030	\$327	\$13,215	\$55,449	\$330
Police Officer and Retail Salesperson	\$72,027	\$242,274	\$1,801	\$75,001	\$314,706	\$1,875
Two incomes: Two Teachers	\$83,552	\$281,014	\$2,089	\$82,954	\$348,077	\$2,074

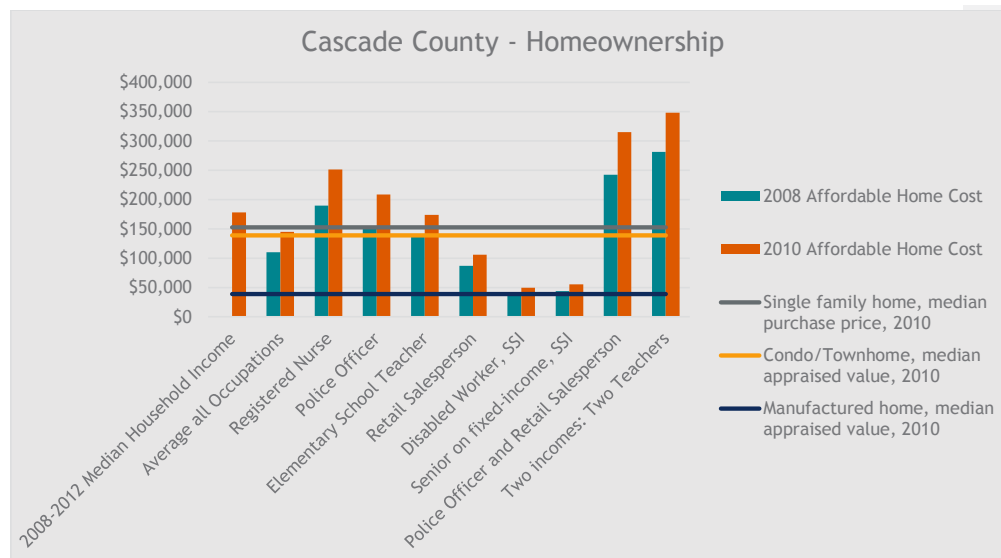
Source: Montana Department of Commerce

Table 6: Cascade County Change in Affordable Housing

	2008	2010	% Change
Single Family Median Home Cost	\$150,000	\$152,750	1.8%
Condos & Townhomes Median Appraised Value	\$138,450	\$139,040	0.4%
Manufactured Home Median Appraised Value	\$38,030	\$39,000	2.6%
1 Bedroom Fair Market Rent	\$453	\$461	1.8%
2 Bedroom Fair Market Rent	\$581	\$591	1.7%

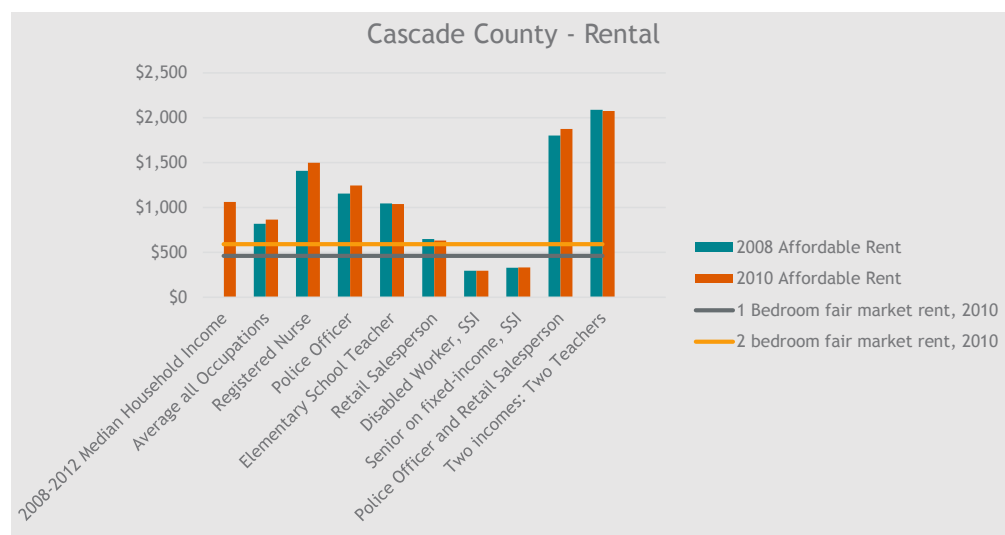
Source: Montana Department of Commerce

Figure 18: Affordable Homeownership Trends



Source: Montana Department of Commerce

Figure 19: Affordable Rental Rate Trends



Source: Montana Department of Commerce

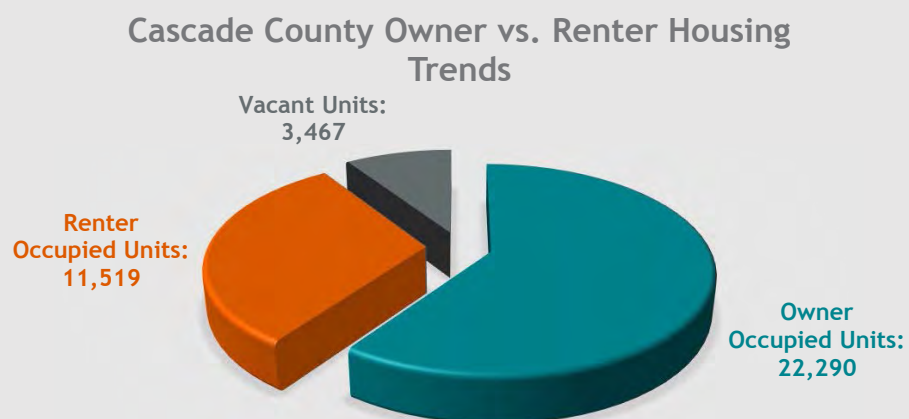
When asked about worker characteristics to determine general housing needs, the vast majority of businesses stated employees would prefer to own a unit rather than rent; however, if temporary workers had an option to rent quality units – updated features and constructed post year 2000 – most businesses stated temporary employees would prefer that option. Some companies stated that rental housing including townhome or duplex units was actually preferred because of the turnover of workforce and that manufactured housing was not a viable option for employees.

KLJ concluded that Great Falls will have enough available housing to meet demand of nearly 1,100 jobs. Businesses were unable to confidently state where expansion plans would occur or where new employees would be hired and would live; therefore, it is extremely difficult to project how many employees will be hired in each county and the associated housing impacts. KLJ estimated the number of new housing units needed based on population forecasts and the average household size in 2010. Woods & Poole data includes an estimated household size projection, whereas KLJ used the 2010 Census household for eREMI projections.

If all 1,800 new jobs created through the year 2020 were located in Cascade County, the County would be able to meet demand based on eREMI models and information provided by the Great Falls planning staff. However, when units in poor condition – units that need substantial improvements to make the structures livable – are included in the overall estimate, then housing becomes a substantial investment so businesses can grow and the community can improve its quality of life.



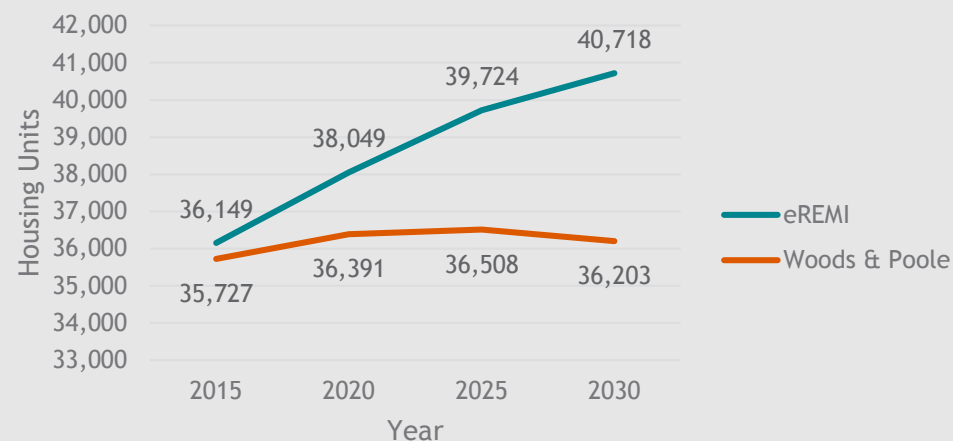
Figure 20: Owner versus Renter Housing Trends



Source: Montana Department of Commerce

Figure 21: Projected Housing Demand, Cascade County

## Cascade County Projected Housing Unit Demand



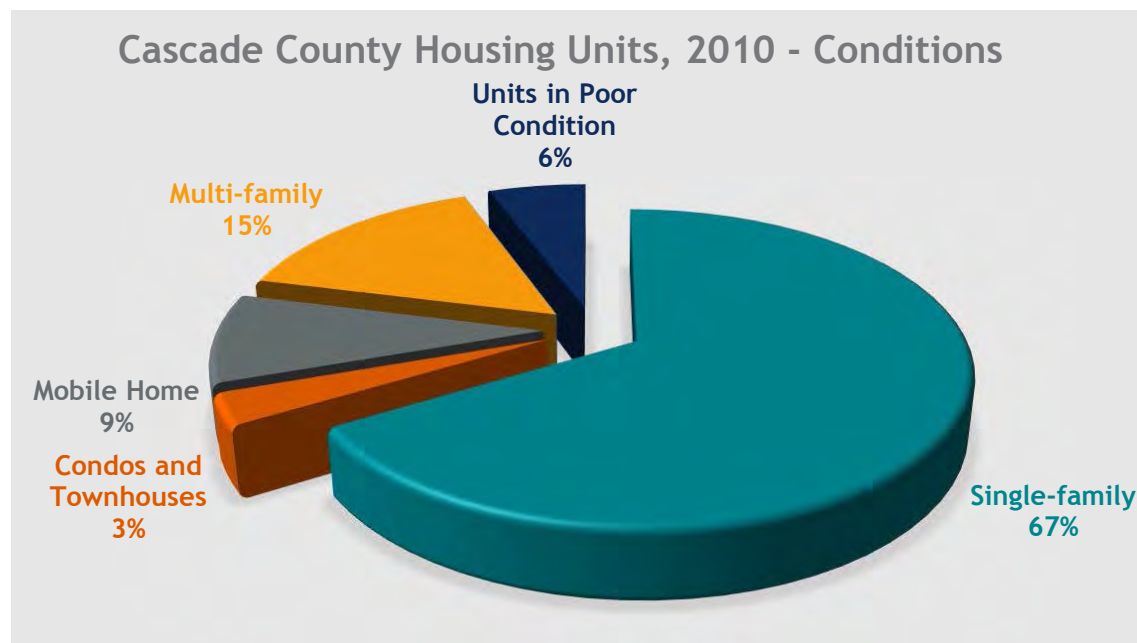
Source: Woods & Poole, Montana Department of Commerce

Table 7: Housing Unit Conditions, Cascade County

	Total Housing Units	Units in Poor Condition, 2010	% of Total	Units in Acceptable Condition, 2010	% of Total
Total housing units	33,696	1,910	5.7%	31,786	94.3%
Single-family	23,806	1,415	4.2%	22,391	66.5%
Condos and townhouses	1,082	0	0.0%	1,082	3.2%
Mobile home	3,325	206	0.6%	3,119	9.3%
Multi-family	5,483	289	0.9%	5,194	15.4%

Source: Montana Department of Commerce

Figure 22: Housing Unit Conditions



Source: Montana Department of Commerce

While the current number (year 2010) of housing units in poor condition was estimated to be nearly six percent of total units; a more staggering number of unmet housing needs – housing that does not meet state building requirements or has inadequate facilities such as no stove or inadequate plumbing – is projected to dramatically increase through 2030. This will make it extremely difficult for businesses to attract employees, especially those with families, unless the County can correct the deficient units to make them livable. Perhaps the most staggering trend is the number of units that are affordable for those people making less than 80 percent of median family income.

While businesses were reluctant to offer wage or salary information, KLJ did analyze personal income and as shown earlier, personal income per capita and household income per capita are expected to increase through 2030. Whether those trends can supplement the increasing unmet housing needs will be determined through local housing and land use policies, that encourage the redevelopment of housing units and neighborhoods that are deteriorating. The maps on the following pages show where potential growth would be appropriate in Great Falls.

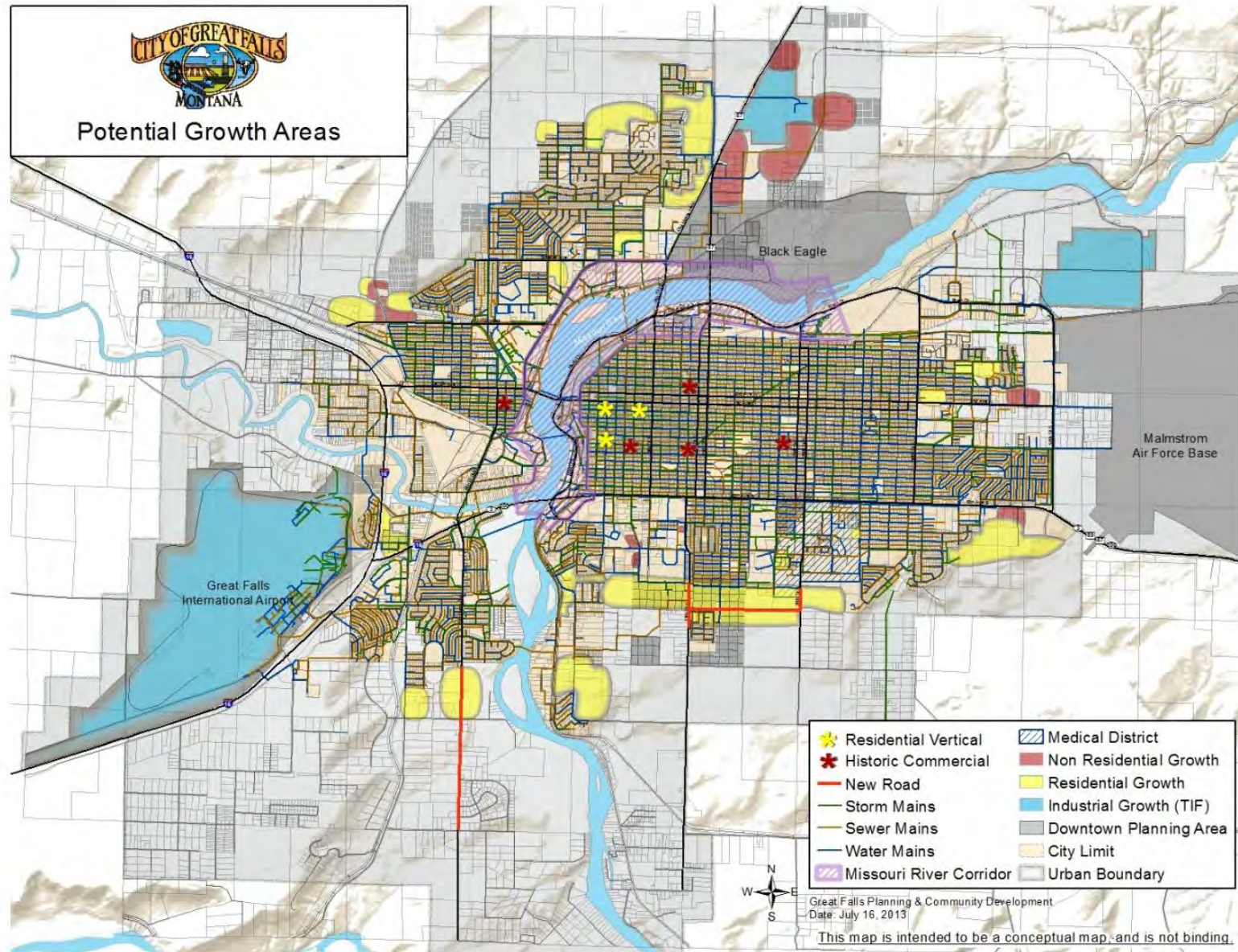
Table 8: Cascade County Projected Unmet Housing Needs

Percent of MFI	Total Renter and Owner				
	Elderly	Small Related	Large Related	Other	Total
<b>2015</b>					
0.0-50.0%	1214	1467	420	1,578	4,679
50.1-80.0%	504	879	295	450	2,127
80.1-95.0	125	285	80	211	689
Above 95.0%	270	854	195	270	1,558
<b>2020</b>					
0.0-50.0%	1,204	1,456	416	1,564	4,638
50.1-80.0%	500	871	292	445	2,108
80.1-95.0	124	282	79	198	683
Above 95.0%	267	817	193	267	1,541
<b>2025</b>					
0.0-50.0%	1,200	1,453	415	1,562	4,630
50.1-80.0%	499	869	292	445	2,105
80.1-95.0	124	282	79	198	682
Above 95.0%	267	815	193	267	1,541
<b>2030</b>					
0.0-50.0%	1,208	1,462	417	1,571	4,659
50.1-80.0%	502	875	293	447	2117
80.1-95.0	124	284	80	199	686
Above 95.0%	269	820	194	269	1,551

Source: Montana Department of Commerce

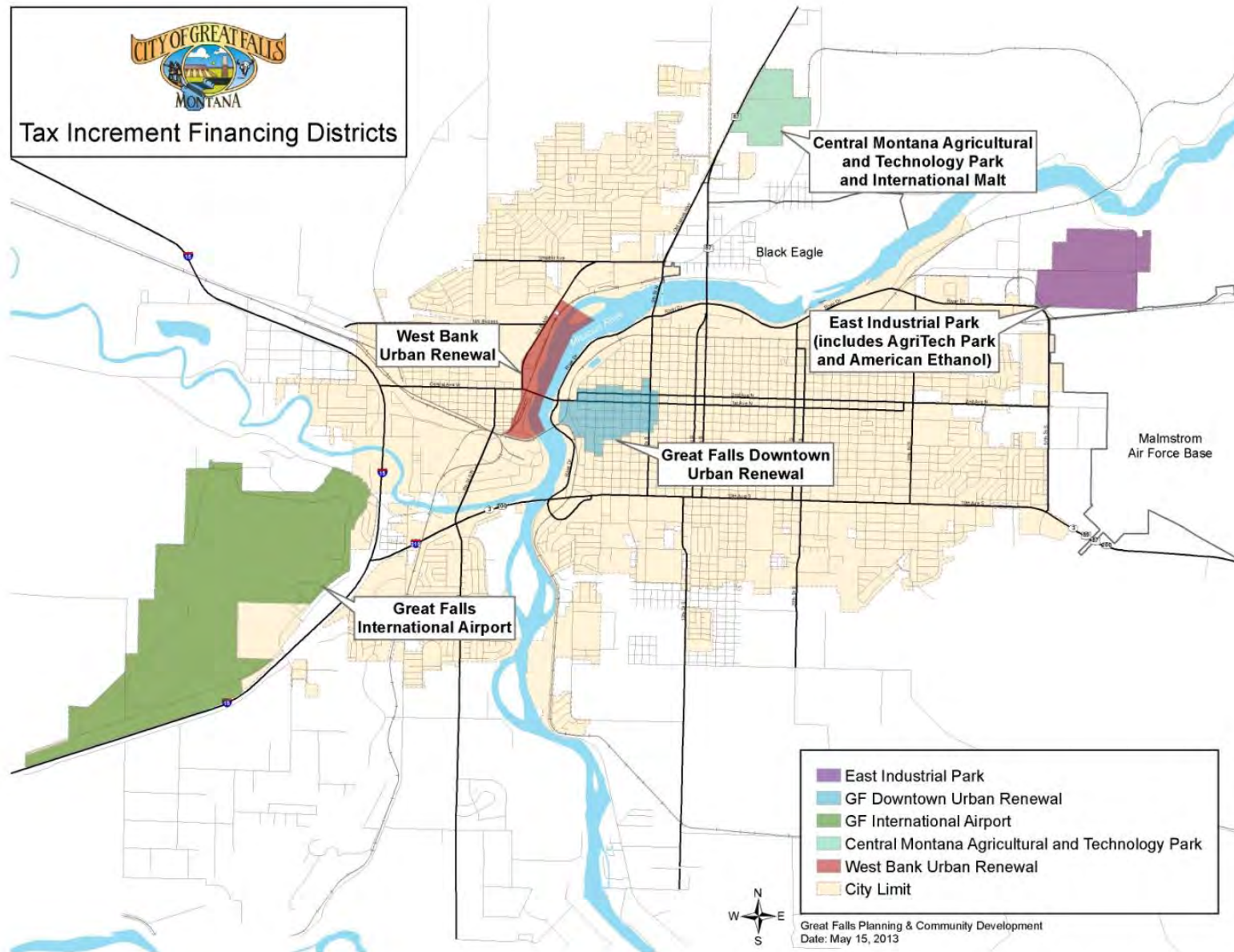
Note: Rounding errors were noted in the Montana Housing Needs Assessment Report

## GREAT FALLS POTENTIAL GROWTH AREAS





## TAX INCREMENT FINANCING DISTRICTS FOR BUSINESS EXPANSION OPPORTUNITIES



## Infrastructure

At the time this report was prepared, total impacts for Cascade County were nearly \$10.8 million excluding the \$15 million upgrade to the Great Falls wastewater treatment plant. The County also has significant road improvements as noted below. The greatest impact is that Belt and Vaughn are both at capacity for their wastewater systems and cannot accommodate growth until those systems are improved. It appears that each community is completing steps to upgrade their systems, but it could be at least two years before actual construction occurs.

In addition, Vaughn, Belt and Sand Coulee are also upgrading their water systems; however, Vaughn cannot accept any new subdivisions as the current water system is at full capacity. Growth and economic development will be nearly impossible until the infrastructure is significantly improved. Information is provided and includes the best available data obtained from public works departments, city/county engineers and consultants working for various city/county departments. KLJ noted where information was not available or not applicable.

The City adopted the 2014 Great Falls Area Long Range Transportation Plan, which outlines several

improvement projects and costs. The City would prefer to improve several interchanges along I-15 including the Emerson Junction and US Highway 87 at Old Havre Highway as well as improve transportation access near 32nd Avenue NE, 33rd Avenue NE and Bootlegger Trail. Great Falls can accommodate growth and has several capital improvement projects underway to either maintain current standards or to plan for additional growth according to their growth policy. The expected improvements will help address the growth planned through the year 2020.

Table 9: Cascade County STIP (2014-2018)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2014	STPS- CM- STPU	2 KM N OF GREAT FALLS - NORTH	S-225	0.14	RECONSTRUCTION	>5
2014	STPE	25TH ST NORTH BRIDGE - GFT			BIKE/PED FACILITIES	<1
2014	STPE	BIKE ROUTE SIGNS - GTF			BIKE/PED FACILITIES	<1
2014	STPE	SIDEWALK 1ST AVE S - GTF	U-5234	0.08	BIKE/PED FACILITIES	<1
2014	STPE	MMRH REHAB - CASCADE CO			REHAB	<1
2014	IM	EMERSON JCT - MANCHESTER	I-15,MT-200,US-89	3.88	REHAB - MAJOR	<1
2014	HSIP	SF 119-GR NW OF SUN RIVER	US-89	4	GUARDRAIL, SKID TREAT	<1
2014	IM	D-3 FENCING - HARDY CR TO ULM	I-15	22.29	FENCING	<1
2014	IM	D-3 FENCING - GTF N&S	I-15,MT-200,US-89	51.15	FENCING	<1
2014	STPS	SMITH RIVER SCOUR REPAIR	S-330	0.3	BANK STABILIZATION	<1
2014	HSIP	SF 129-GF WRNG WY-PH 1	I-15,MT-200,US-287,US-8	206.47	SIGNING - NEW	<1
2014	UPP	AIRPORT ROAD - GTF	U-5212	0.6	CHIP SEAL	<1
2014	UPP	5TH STREET N & S - GTF	U-5224	1.29	CHIP SEAL	<1
2014	HSIP	SF 139 - SUN PRAIRIE TURN LANE	X-07611	3.44	INT IMPROVEMENTS	<1
2014	RRP	RR XING - ARMINGTON	L-7-228	0	RR CROSSING	<1

Table 9: Cascade County STIP (2014-2018) (continued)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2014	CM	10TH AVE S & 32ND ST - GTF	MT-200,MT-3,US-87,US-8	0.1	RECONSTRUCTION	<1
2014	TA	OVERLOOK DR PATH-GTF	U-5205	0.26	BIKE/PED FACILITIES	<1
2014	TA	WEST BANK TRAIL IMPRVTS - GTF			BIKE/PED FACILITIES	<1
2014	IM	ULM SOUTH - NB	I-15	2.22	MILL & FILL	<1
2014	NH	3RD ST NW - GTF	N-101	1.99	CHIP SEAL	<1
2014	NH	14TH & 15TH STREET N & S - GTF	US-87	1.37	CHIP SEAL	<1
2015	MT-CM	SO CENTRAL ARTERIALS-GTF	U-5215, U-5226, L-7-910	0.41	RECONSTRUCTION	<1
2015	MT-CM	SO CENTRAL ARTERIALS-GTF	U-5215, U-5226, L-7-910	0.41	RECONSTRUCTION	<1
2015	IM	EMERSON JCT - MANCHESTER	I-15,MT-200,US-89	3.88	REHAB - MAJOR	<1
2015	NH	GREAT FALLS - NORTH	US-87	6.67	RECONSTRUCTION	<1
2015	STPB- STPX	MT-21 BRIDGES (SIMMS-AUGUSTA)	MT-21	20	BRIDGE REHAB	<1
2015	IM	D-3 FENCING - BRADY NORTH	I-15	70.13	FENCING	1 TO 5
2015	HSIP	SF 129-GTFLS HRZNTAL CRV SIGNG			SIGNING - UPGRADE	<1
2015	HSIP	SF 129 - FLT E CASCADE	S-330	0.5	SLOPE FLATTENING	<1
2015	STPP	KINGS HILL - NEIHART	US-89	9.4	OVERLAY	1 TO 5
2015	STPE	CHARLES RUSSELL PARK PATH-GTF			BIKE/PED FACILITIES	<1
2015	STPE	23RD STREET SOUTH WALKS-GTF			BIKE/PED FACILITIES	<1
2015	UPP	25TH AVE NE - GTF	U-5202	0.41	MILL & FILL	<1
2015	UPP	8TH AVE N - 6TH TO 15TH - GTF	U-5216	0.74	MILL & FILL	<1
2015	UPP	9TH ST S - 10TH TO 2ND - GTF	U-5242	0.61	CHIP SEAL	<1
2015	UPP	AIRPORT ROAD - GTF	U-5212	0.6	CHIP SEAL	<1
2015	UPP	5TH STREET N & S - GTF	U-5224	1.29	CHIP SEAL	<1
2015	STPE	COURTHOUSE PRESERVATION - GTF			HISTORIC PRESERVATIO	<1
2016	MT-CM	SO CENTRAL ARTERIALS - GTF	U-5215, U-5226, L-7-910	0.41	RECONSTRUCTION	1 TO 5
2016	NH	GREAT FALLS - NORTH	US-87	6.67	RECONSTRUCTION	<1
2016	STPB- STPX	MT-21 BRIDGES (SIMMS-AUGUSTA)	MT-21	20	BRIDGE REHAB	<1



Table 9: Cascade County STIP (2014-2018) (continued)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2016	HSIP	SF 129 - GTFLS SIGNAL BORDERS	MT-200,MT-3,US-87,US-8	5.35	INT UPGRADE/SIGNALS	<1
2016	HSIP	SF 129 - SFTY IMPR GIFFEN	S-227	0.5	INT IMPROVEMENTS	<1
2016	HSIP	SF 129 - FLT E CASCADE	S-330	0.5	SLOPE FLATTENING	1 TO 5
2016	NHPB	BRIDGE PRES, GF IM, 2014	I-15,I-315,MT-200,MT-3,U	0.1	BRIDGE DECK	>5
2016	HSIP	SF 139 - GTFL ADV SGNL FLASHER	MT-200,MT-3,US-12,US-2	0.1	ADV FLASHER, LUMINAIR	<1
2016	STPU	FOX FARM RD - GREAT FALLS	U-5220	1.51	RECONSTRUCTION	1 TO 5
2016	STPU	FOX FARM RD - GREAT FALLS	U-5220	1.51	RECONSTRUCTION	<1
2017	IM	EMERSON JCT - MANCHESTER	I-15,MT-200,US-89	3.88	REHAB - MAJOR	>5
2017	STPB- STPX	MT-21 BRIDGES (SIMMS-AUGUSTA)	MT-21	20	BRIDGE REHAB	1 TO 5
2017	STPU	FOX FARM RD - GREAT FALLS	U-5220	1.51	RECONSTRUCTION	>5
2018	NH	BELT - N & S - PHASE 2	MT-200,MT-3,US-87,US-8	10.31	RECONSTRUCTION	>5

Source: MDT

Table 10: Cascade County Sewer Improvements

Cascade County	Sewer System				
Community	Type of System	Is system at capacity?	If at capacity, what would it cost to expand?	If not at capacity, how many more average residential connections can the system handle?	Comments
Great Falls	Mechanical	No	N/A	5,500 residential connections	The City is constantly doing work on the wastewater system, the treatment plant is currently undergoing a \$15 million improvement to deal with ammonia and installed a UV disinfection system, the City budgets roughly \$1 million per year for sewer main and manhole work, various lift stations are currently being improved
Portage (unincorporated)	N/A	N/A	N/A	N/A	N/A
Vaughn (unincorporated)	Lagoon	Yes	\$4-5 million	N/A	Currently under administrative order, cannot meet effluent limits, must go to a mechanical plant, would like to connect troubled wastewater system from the subdivision to the west, have had to turn away developers because of sewer capacity
Sun River (unincorporated)	Individual Drainfields	N/A	N/A	N/A	N/A
Fort Shaw (unincorporated)	Individual Drainfields	N/A	N/A	N/A	N/A
Simms (unincorporated)	N/A	N/A	N/A	N/A	N/A
Tracy (unincorporated)	Individual Drainfields	N/A	N/A	N/A	Individual drainfields are working great
Sand Coulee (unincorporated)	Individual Drainfields	N/A	N/A	N/A	The town is in need of a community sewer system, they have water quality problems
Stockett (unincorporated)	Lagoon	No	N/A	Unknown, system was built 10-12 years ago	It is expected that when the sewer system was constructed, 10-12 years ago, it would have been designed for a 20-year planning period
Cascade	Lagoons	No	N/A	recently updated	The system has recently been updated with funds acquired from Sweetgrass Development and they do not have a need for additional infrastructure improvements
Belt	Lagoon	Yes	\$2.5 million	N/A	Currently updating PER for submittal to funding agencies for construction of UV system and spray irrigation
Fife (unincorporated)	Individual Evaporation Beds	N/A	N/A	N/A	Soils are made up of clay; therefore, drainfields do not work

Table 11: Cascade County Water Improvements

Cascade County	Water System				
Community	Type of System	Is system at capacity?	If at capacity, what would it cost to expand?	If not at capacity, how many more average residential connections can the system handle?	Comments
Great Falls	Missouri River	No	N/A	Treatment plant has significant additional capacity. In some areas, pressure and fire flow capacity may restrict expansion	Water treatment plant is currently undergoing a \$25 million improvement and adding UV and various other mods., the City budgets roughly \$2 million per year for water main replacement and various system improvements
Portage (unincorporated)					N/A
Vaughn (unincorporated)	Wells	Very Close	Unknown (\$300,000 from Jason)	20 at the very most	Cannot accept a new subdivision, have had to turn away developers because of the water system, need additional well and reverse osmosis treatment
Sun River (unincorporated)	Individual Wells	N/A	N/A	N/A	N/A
Fort Shaw (unincorporated)	Individual Wells	N/A	N/A	N/A	N/A
Simms (unincorporated)	N/A	N/A	N/A	N/A	N/A
Tracy (unincorporated)	3 Wells	No	N/A	Many more	The system can handle more but the board that runs the system may not allow more connections
Sand Coulee (unincorporated)	Wells	Yes	Unknown (\$2 million from Jason)	N/A	Currently expanding their water system, a new well was drilled last year, currently being bid for construction are new water mains, new tank, new services, another well, all funded through abandon mine reclamation
Stockett (unincorporated)	Wells	No	N/A	Unknown, system was built 10-12 years ago	It is expected that when the water system was constructed, 10-12 years ago, it would have been designed for a 20-year planning period
Cascade	Wells	No	N/A	Under construction	The system has recently been updated with funds acquired from Sweetgrass Development and they do not have a need for additional infrastructure improvements
Belt	2 Wells into Madison	Yes	\$1.0 million	N/A	They are currently constructing a new tank
Fife (unincorporated)	Individual Wells	N/A	N/A	N/A	Wells are about 150-170' deep

Table 12: Cascade County Landfill Status

Cascade County	Landfills	
Community	Name	Status
Great Falls	High Plains Landfill, Class II, Great Falls, (Shumaker Class IV Landfill, Class IV, Great Falls)	The landfill is not at capacity, they have approximately 28 years of available space that is currently permitted on 150 acres, they have a lease agreement for an additional 400 acres that is not currently permitted
Portage (unincorporated)		
Vaughn (unincorporated)		
Sun River (unincorporated)		
Fort Shaw (unincorporated)		
Simms (unincorporated)		
Tracy (unincorporated)		
Sand Coulee (unincorporated)		
Stockett (unincorporated)		
Cascade		
Belt		
Fife (unincorporated)		

The 350-bed detention center opened in 2005 and has been operating over capacity almost constantly. At the time this report was prepared, the center had about 400 inmates which placed it at critical mass almost constantly and often created crowding issues. Although there is ongoing discussion about potential solutions on the facility and policy sides, no solution has been identified.

## FIRE DEPARTMENTS

While most departments in the County typically operate and work well, it was gleaned from interviews that poor communication was a common trend identified in Cascade County. A major problem was the lack of sufficient infrastructure to ensure that transmission signals were not dropped. However, it was evident that there were also some administrative and inter-governmental issues which needed to be resolved.

### SAND COULEE FIRE DEPARTMENT

In 2014, the department had 10 volunteers. Volunteer membership had been stable in recent years. Sand Coulee has a station that was new in 2005, as well as four fire fighting vehicles. The department needs to add a 4,000 gal 4x4 tender with an estimated cost of \$250,000. The Stockett Fire Department has been dissolved by the County Commission and the Sand Coulee Department is currently providing services. Sand Coulee will need to add a tender truck and a quick response or brush truck. The cost for the tender is estimated at \$100,000-\$250,000, and for the quick response unit approximately \$50,000. A significant concern for the department is the poor quality communications. They need a higher powered repeater to ensure communication between truck and staff is sufficient, especially during fire responses.

## Community Services

### LAW ENFORCEMENT

Cascade County reported that they would like to add another 10 deputies to provide for another shift. The County has very little turnover among law enforcement staff. The County is a full service law enforcement agency that serves the entire county, including Malmstrom AFB, all the unincorporated towns, and also contracts with two cities to provide law enforcement service. The County Sheriff Department also operates a combined county-regional detention center that is chronically understaffed and suffers from constant turnover, despite the fact that in Cascade County it is one of the best-paying entry level positions available. Detention staffing is a nation-wide issue.

The Department operates on a \$14 million dollar budget, and is one of the larger employers in Cascade County. As noted earlier, the department had the largest officer-to-population ratio in the region; however, this was in part a result of Great Falls metro area. If Great Falls population is removed, then the county would operate at a similar level with other law enforcement staff in the region.

Table 13: Law Enforcement Status

	Law Enforcement Staff Level	Support Staff Level	2010 County Population	L.E. Staff Per Capita
Cascade County	35 FTE	85 FTE	81,327	2,323/LEO
Cascade County w/o Great Falls	35 FTE	85 FTE	22,822	652/LEO
Great Falls	85 FTE	42 FTE	58,505	688/LEO

## GREAT FALLS FIRE DEPARTMENT

The Great Falls Fire Rescue has 65 uniformed fire fighters with 68 total employees and four fire stations. The City manages the county-wide E911 system. All suppression Firefighters are certified EMTs with 20 of them also certified as Paramedics. The department has no immediate needs for additional facilities but will require new stations if growth occurs to maintain the level of service currently provided.

## MONARCH FIRE DEPARTMENT

The department has 12 volunteers and has very little turnover. They have five fire fighting vehicles that are all in good condition. Similar to Sand Coulee, the department has significant problems with poor quality communications.

## BLACK EAGLE FIRE DEPARTMENT

The department has 28 active volunteers who are all from Great Falls or Black Eagle. The department is in need of a new station and at least \$50,000 is needed to purchase the property site for a second station. Additionally, the department needs at least one more tender and a brush truck. The tender is estimated to cost \$180,000 and the brush truck, \$80,000. There is significant growth in Black Eagle that pushes the need for more response capacity. If the department receives funding for the second station site, they will also need a rescue truck which may cost between \$150,000 and \$180,000.

## BELT FIRE DEPARTMENT

The department has six volunteer fire fighters but

most of them work out of town during the week so it is potentially possible to not have enough firefighters to respond. They have two firefighting vehicles. They do not anticipate any significant growth because much of the land is in the floodplain.

## CASCADE FIRE DEPARTMENT

The city of Cascade has a volunteer fire department of 10 active volunteers although seven more are on the roster. It serves both the City of Cascade and a rural district outside the city. The biggest challenge for the department is the lack of people available for weekday responses. They have had significant turnover in the department and the longest serving volunteer has only been there 9 years. Although no significant development growth is anticipated, if it were to occur there would be a major need for additional staffing.

## FORT SHAW FIRE DEPARTMENT

The department has 17 active volunteers with another six on the roster. There has been significant turnover of Hutterite colony members recently, but overall the department has been fairly successful at training and retaining volunteers. They have mutual aid agreements with the Simms and Sun River Fire Departments so that they automatically respond to incidents in any of the three districts. Although the department has 11 vehicles, two will need to be replaced. Additionally, some of the vehicles require specially-trained drivers which are in short supply, so not all vehicles are available for response. One area of growing demand is EMS because of the growing aging population. The Department has a need for funding for a new or expanded fire hall with an

estimated cost of approximately \$250,000.

## DEARBORN FIRE DEPARTMENT

The department has six active volunteers, which is down from 18 people several years ago. Recruiting has been difficult because so many people work out of the area and are not available to respond. They have adequate capacity to fight wildland fires but not structure fires. The fire chief noted that the shortage of volunteers is a problem in many of the rural fire departments, and that there has been discussion about a unified fire service area but there seems to be some reluctance because of tradition and boundary concerns.

The Department service area has recently had a decrease in population but has witnessed an increase in the number of structures with foundations. If they have any new construction of commercial buildings they would need to add a ladder truck with an estimated cost of \$185,000 to \$210,000. The Department also needs more storage for its existing equipment. The chief also noted a major communication problem: very limited internet access in the area. The area needs infrastructure to provide cell phone and broadband transmission for the entire county so departments can coordinate efforts. Currently, there is a 35-mile stretch along I-15 that is a dead zone.

## SIMMS FIRE DEPARTMENT

The department has approximately 10 active volunteers. The population of the district has shrunk and volunteers are hard to attract; volunteer turnover is typically one or two per year. As noted earlier, they have mutual aid

agreements to co-respond together with Fort Shaw fire department. Funding for operations is in short supply, but they are able to function with the current equipment.

## ULM FIRE DEPARTMENT

The department has approximately 25 active volunteers. The older members of the department are very stable, but the younger ones seem to come and go. It has seven fire fighting vehicles and one additional water tender being built, but still would like a command utility vehicle that could be used on medical calls. They also need to expand or replace the fire hall. In order to accomplish their preference for a new building they will need to raise more than \$500,000; however, the department does not have enough structure fires to qualify for grants.

## VAUGHN FIRE DEPARTMENT

The department has four different stations with volunteers organized to work out of each location. There are a total of 44 volunteers with most working out of the main station. One of the three satellite stations does not have anyone managing it. The department has a high turnover rate as they see numerous people volunteer but then quit being involved in less than a year. Currently, it has 11 fire fighting vehicles which are all in need of replacement; the newest vehicle is 1991. Additionally, volunteers noted they need a ladder truck to service structural fires as well as upgrades to personal protection equipment. This department has a very large service area and is responsible for responding to military installations in the area.

## NIEHARDT FIRE DEPARTMENT

The department has 12 volunteers, a fire hall in excellent condition, and four fire fighting vehicles. Although they could benefit from more volunteers the current staffing is adequate. There is concern about the lack of young volunteers to replace aging personnel. In the past five years, the department has experienced a higher turnover rate with more than 50 percent of volunteers quitting within the first year. The department's first priority is a pumper at the cost of \$150,000 - \$200,000, but they also need a quick response unit. In addition, turnout gear is needed at an estimated cost of \$18,000.

## SCHOOLS

Schools in Cascade County are not experiencing similar trends as other rural counties in the Sweetgrass Region. Unlike the other four counties, enrollments are either steady or slowly increasing and the Great Falls school district is actually planning for upgrades to facilities. However, similar to trends across all the counties, quality teachers in math, science and music are the most difficult positions to fill and attract, especially for rural

districts outside Great Falls.

## VAUGHN SCHOOL DISTRICT

The district currently has an enrollment population of 133 students in grades K-8. The school district has seen substantial growth since 2009 when it had 79 students. Part of this growth can be attributed to students attending a school closer to where they live than their other option of Great Falls.

The existing student-teacher ratio is 10:1, but 15:1 is considered ideal. There are no significant turnover issues in the district.

The school district could accommodate another 3-4 students per grade level without adding staff. Also, they could add two to three additional classrooms just by reorganizing use of space. Some facility needs have been identified, including a locker area and a kitchen area with anticipated minimum costs of approximately \$10,000 each. Many of their maintenance issues were addressed recently when they received a \$140,000 grant.

Table 14: School District Summary, Cascade County

School District	Estimated Enrollment (K-12)	Student: Teacher Ratio	Facility Upgrade/ Expansion Costs	Issues
Great Falls	10,300	Varies	\$59 million	Housing for teachers
Belt	320	10:1	TBD	Plumbing issues; recruiting math/ music
Vaughn	133 (K-8)	10:1	\$140,000/ grant	Housing and recruiting of teachers

## BELT SCHOOL DISTRICT

The school has a K-12 school enrollment of approximately 320 students, including 38 students at a Hutterite colony. The student population has been fairly stable and is anticipated to remain so.

The existing student-teacher ratio is approximately 10:1, which is their desired ratio. The district has a minimal turnover of teachers, but recruiting new teachers is a struggle especially for music and math. The existing school facility has sufficient space to meet their needs. The facility has some plumbing problems that need to be addressed, but they do not yet have a cost estimate.

The city of Belt is experiencing significant water and sewer infrastructure costs which will likely be passed on to the end users. The increased costs will be affecting the entire community including the school.

## GREAT FALLS SCHOOL DISTRICT

The district has a student enrollment of approximately 10,300. There has been a long, slow decline in enrollment over the last 10-12 years but it appears to be stabilizing or starting to grow in some younger grades.

Student-teacher ratios are generally at the required levels, but a recent high influx of kindergarteners has caused hiring additional staff to sustain those levels. Overall teacher staff is fairly stable, although turnover may be a little higher than typical because of retirement. In addition teachers who are military spouses tend to leave when their spouse takes another assignment. As is the case all over recruitment of certain specialty teachers

is much more difficult than other program areas.

The district has 15 elementary schools, 2 middle schools, 2 high schools and 1 education center in the district. The high schools have substantial capacity for growth, but the middle schools and elementary schools may be impacted if growth occurs. The last building was constructed in 1979 and the average building age is 58 years old. Therefore, there are some substantial physical facility maintenance costs especially for HVAC and plumbing. A recent master planning process was completed for one of the high schools, which resulted in a cost estimate to bring the school up to modern standards at a cost of \$59 million. The District will be embarking on a district-wide study of all the building needs and then determining a strategy to address facility needs.

One other point made was that low-income housing and market housing are difficult to find in the District.

## HOSPITALS, CLINICS AND EMS

Cascade County has been very well served, primarily by Benefis Health Systems, and has excess capacity in terms of facilities/beds, and complete professional staffing for the entire county. Benefis Health System, which is located in Great Falls, has capabilities that rank very well in the United States. The hospital has a Level 2 Trauma Center. Benefis has the ability to handle significant growth in medical service demand if growth were occur.

Staffing of nurses and doctors in the Great Falls area is not nearly as difficult as in some of the outlying areas, especially in rural communities. However, recent trends

indicate that nursing shortages may occur as hospitals will need to treat a growing elderly population especially in the next five to ten years. As such, establishing a recruiting mechanism or “pipeline” of nursing students is critical to the area.

The Great Falls Clinic Medical Center is a for-profit hospital and provides hospital care for specialty services. The medical center is open year-round, but the Northwest Clinic and specialty clinics are typically not staffed during the weekend. The medical center prides itself on maintaining an adequate workforce with its providers, but significant population growth would require them to hire additional staff to maintain the current level of patient care and quality.

EMS providers did not respond to interview requests. However, the Great Falls Emergency Services provides 9-1-1 services along with critical care transport, life support and special event medical standby support throughout Cascade County.

## Strategies

Strategies for Cascade County are similar to other counties included in this study; however, because Great Falls is the largest urban area within the study area, several strategies for moving forward focus on Great Falls because it is the single largest economic hub for north-central Montana.

## EMPLOYMENT

- » Collaborate with workforce development programs, especially with University of Great Falls and Great



Falls College MSU to create skilled-trade training programs for the following:

- » Diesel mechanics
  - » Precision manufacturing
  - » Welders
  - » Accountants
  - » Nursing and health care staff
  - » Semi-truck drivers
- » Create scholarships for local students/youth to local/regional educational facilities or trade schools coupled with internships at local businesses to encourage youth to stay in the community. The program could be expanded to 2nd and 3rd year students from outside the region to encourage them to stay as well.
  - » Provide education debt repayment for both traditional and trade schooling for younger employees willing to stay or relocate to the region.
  - » Improve apprentice programs for trades (diesel mechanics, manufacturing, welders, electricians, plumbers and truck drivers) and encourage youth to move into and advance in these vital fields.
  - » Develop a middle and high school career day with focus on the trades. Not every student has the goal of going on to higher education and should find the same level of encouragement to pursue work in the trades.
  - » Actively market the AgriTech Industrial Park for future industrial growth and coordinate efforts with potential commercial land available near the airport for future office/commercial growth.

» Continue downtown redevelopment efforts especially in regards to providing both commercial and residential mixed use opportunities.

## HOUSING

- » Continue participating in the Workforce Housing Summit whereby city/county staff, elected officials, developers and local businesses discuss strategies to provide better workforce housing options at lower price points.
- » Begin addressing affordable housing for middle-income persons including teachers, law enforcement and small business owners.
  - » Policies may include inclusionary zoning, incentive based programs such as density bonuses or land development codes changes that encourage PUD zoning.
- » Coordinate with NeighborWorks Montana to find appropriate housing policies and affordable housing developers to begin developing a county-by-county plan on where to construct units.
- » Identify units in poor condition and units with unmet needs to create a working database that can be shared across the region; utilize HOME grants, Habitat for Humanity and low-interest or revolving loans funds to begin rehabilitating such structures.
- » Continue utilizing tools to encourage new development and redevelopment of urban blighted areas through the use of Tax Abatement programs and Tax Increment Financing (TIF) Districts; currently the City of Great Falls has five TIF districts.
- » Improve multifamily offerings and rental housing options that are updated; currently Great Falls has

300 new, multifamily units under construction or in the permitting phase.

- » Implement an education program on the 'rungs of home ownership' would be beneficial in each jurisdiction. Several employers stated that employees want more modern rentals and newer homes. The stark reality is that homes/apartments, which meet these definitions, typically rent/sell for more than what had traditionally been affordable.
- » Implement programs to acquire, renovate and remarket dwellings/rentals that are deemed to be substandard. Groups like NeighborWorks or the Montana Home Ownership Network may be able to help modernize and then sell or lease units. Lease-to-own programs for renovated housing should be considered.
- » Allow for modular homes, which are not manufactured homes, in zoning codes. Many modular homes are being built to the 2012 International Building Code Council Residential standards. This is a higher standard than required by the State of Montana via the Building Code and therefore modular homes tend to be more energy efficient.
- » Consider via each jurisdiction's Growth Policy and subdivision regulations to create developments that provide a mixture of lot sizes and permitted number of dwellings on a given lot. This is especially effective in areas where water and/or sewer is available to the lot.
- » In more rural areas consideration should be given to having Montana State Subdivision Law revised to allow for the creation of ½-acre lots with shared water and on-site septic systems. However, this

would require changes to Montana state law and DEQ rules.

- » Business should, if possible, pursue options for telecommuting to improve quality of life and reduce transportation costs.
- » Create workforce housing near schools and business centers to address housing needs; jurisdictions should consider implementing workforce housing programs to offer incentives for affordable housing.

## INFRASTRUCTURE

- » Utilize preliminary engineering reports (PER) as a planning tool to prepare for grant requests; submit requests on time for funding cycles.
- » Develop impact fees to offset improvement costs with the money that is being spent, or needs to be spent, to improve or expand capacity. Service providers should consider impact fees or other forms of capital reserves to defray costs of future expansions or replace capacity that is incrementally reduced with development. This is very important given the massive costs associated with improvements to water and waste water treatment systems and the dramatic reductions in grant funding to help pay for these required improvements/expansions.
- » Create and implement a comprehensive Capital Improvements Plan for jurisdictions, including water/sewer districts to help prioritize projects and establish user rates and potential increases.
- » Determine if user rates are in line with rates expected by Montana DEQ. End user rates for water/sewer are very important in obtaining grant.

- » Local governing bodies should analyze the status of local roads and streets and develop options to fund long-term maintenance. Quality local roads encourage quality development.
- » CDBG via the State of Montana Department of Commerce funds several Planning Grants on an annual basis. The Planning Grants are typically first come first serve.
- » CDBG also provides competitive construction grants that are administered at the state level. While the grants require a low to moderate income benefit there are ways to bring these funds into the most affluent communities

## LOCAL SERVICES

- » Develop a nursing job shadow program with the ability to train registered nurses in the Great Falls area with an emphasis on serving critical access hospitals.
- » Implement law enforcement and fire district capital improvements including funds for personal protection equipment into the County's CIP to help offset costs.
- » Develop an incentive program for volunteer fire firefighters such as pay per response.
- » Collaborate with fire departments across the region including all five counties to explore joint/inter-local agreements to supplement a declining volunteer force.
- » Create a grant funding database for specific services to apply for and utilize Sweetgrass Development as the primary grant coordinator.

- » Explore the option of utilizing Payment in Lieu of Taxes (PILT) from the Federal Government to fund large capital improvements by setting aside these funds rather than using them to balance budgets.
- » Fire departments and EMS should pursue FEMA Grants and other Public Safety Grants available from the State of Montana (MDT and DOJ) to upgrade their radios and other communication equipment to solve communication problems.

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## Overview

Glacier County encompasses the Town of Browning and City of Cut Bank and includes the Blackfeet Reservation. Employment numbers for the Blackfeet Reservation have been included solely within Glacier County, although a portion of the Tribe's land does extend into Pondera County. As noted earlier, jobs were assigned to each county based on where the headquarters or primary business office was located for each company interviewed, and does not necessarily reflect the actual distribution of job growth throughout the region. However, assigning job numbers was crucial to estimate impacts and to determine if employment and population forecasts were in line with separate data entities such as Woods & Poole and eREMI.

## Impact Summary

Glacier County was expected to have the fewest number of new jobs from forecasts supplied by Woods & Poole; however, business interviews indicated that the county will have more job growth than Pondera County and Teton County, if growth from the Blackfeet Reservation was included. Trends indicated a stable workforce with very few turnover issues, as compared to the other four counties in the region. Population estimates varied between adding nearly 500 people by 2030 to actually peaking in

**The estimated employment growth for the County through 2020 includes:**

- 39 permanent jobs
- 23 temporary jobs
- 62 total jobs

population near year 2020 and then slowly declining. Either scenario points to a very slow growth rate in the next five to fifteen years.

The county is expected to have 62 new jobs throughout the year 2020 as obtained from business interviews; 39 are classified as permanent jobs and 23 are classified as temporary (employed less than 6 months during a year). The Blackfeet Reservation is estimated to have more than 1,400 new permanent and temporary jobs through the year 2020 according to the Blackfeet Planning Department.

Employers generally have a difficult time finding employees with qualified skills, although Browning does appear to be attracting employees with skill sets that can be plugged into existing vacancies. Unlike Cascade County, Glacier County jobs tend to pay significantly less and are projected to be well below the Montana statewide and United States average. Jobs are expected to remain steady, but no significant impacts are forecasted as a result of a large influx of jobs or other economic opportunities.

Housing was affordable for the vast majority of job earners, private employers stated housing was generally not an issue for current employees or was seen as a barrier to attracting new employees.

Infrastructure is generally in good shape for both Cut

**The estimated impact growth for the Blackfeet Reservation through 2020 includes:**

- 800 permanent jobs
- 600 temporary jobs
- 1,400 total jobs

Bank and Browning. Cut Bank does require a \$12.5 million upgrade to their wastewater system, which is planned to be completed in 2015.

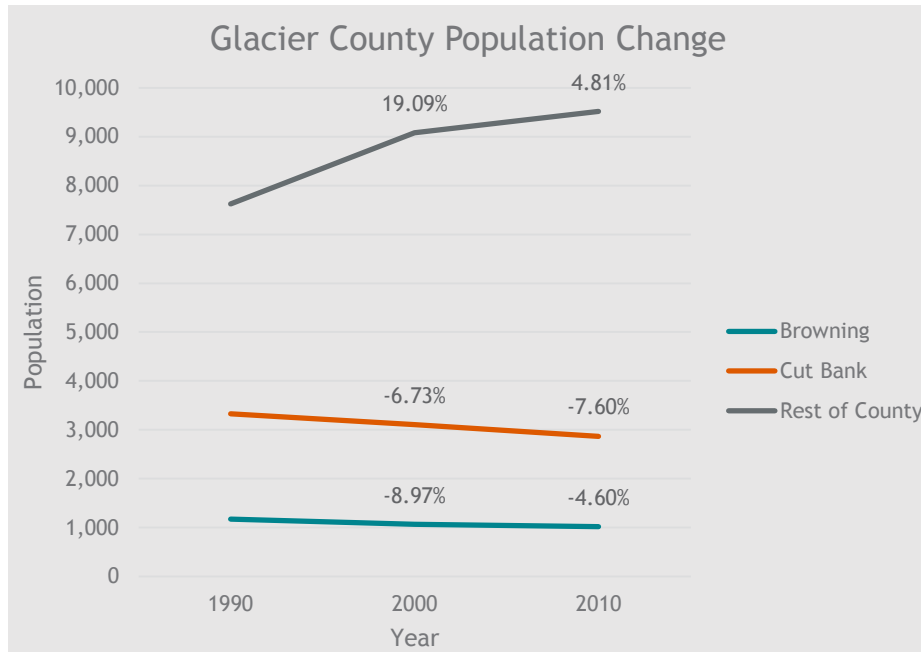
Law enforcement, fire departments, schools and hospitals all are able to support growth if it should occur as most facilities would not need major expansions should growth happen. However, schools and fire departments do have maintenance issues that should be addressed with appropriate planning and cost estimates for such items.

## Population

Unlike Cascade County, which is expected to have steady growth through 2030, Glacier County is expected to have continued slow growth in rural areas, whereas the city centers – which have experienced population declines – will likely continue to do so into the future. The county has a mixed population projection depending upon the data source. MT CEIC estimates that population will continue to grow until year 2020 and then begin to decline afterward. Woods & Poole data suggests that the county will continue to grow – albeit at a very slow pace – by adding approximately 400 people in the next 15 years.

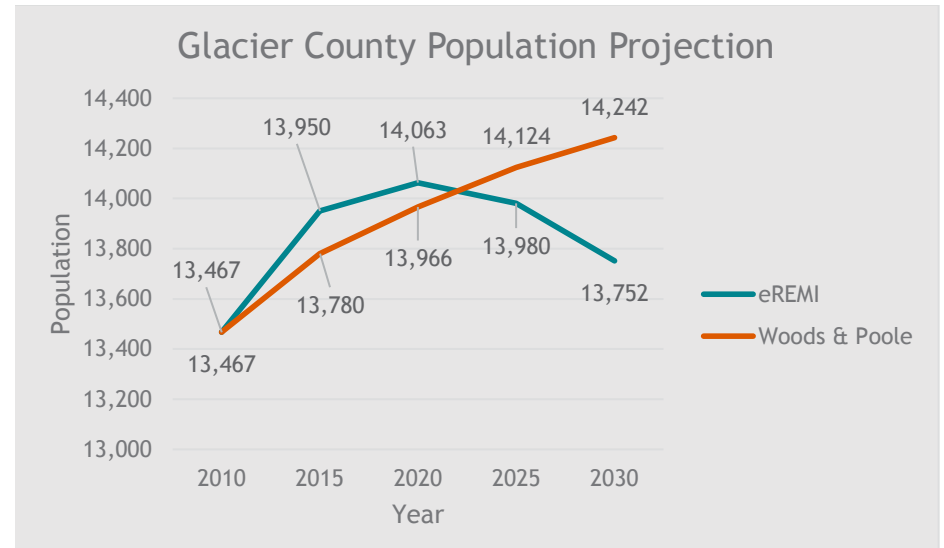
Information gleaned from business interviews and community stakeholders suggested that some sectors, such as school enrollments, are continuing a slow decline, but some businesses are optimistic that growth will occur. Data from interviews indicated the County will only add a small number of jobs throughout the year 2020 unless a major economic shift occurs. This points to a very slow or no net gain of people in the near future.

Figure 23: Glacier County Population Trends



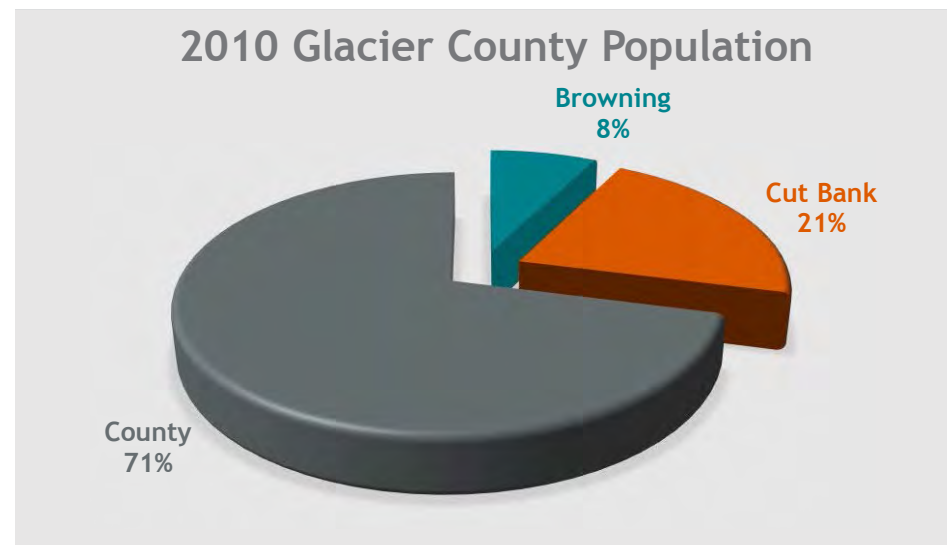
Source: US Census

Figure 24: Glacier County Population Projections



Source: Woods & Poole, MT CEIC

Figure 25: Allocation of Glacier County Population



Source: US Census

## Employment

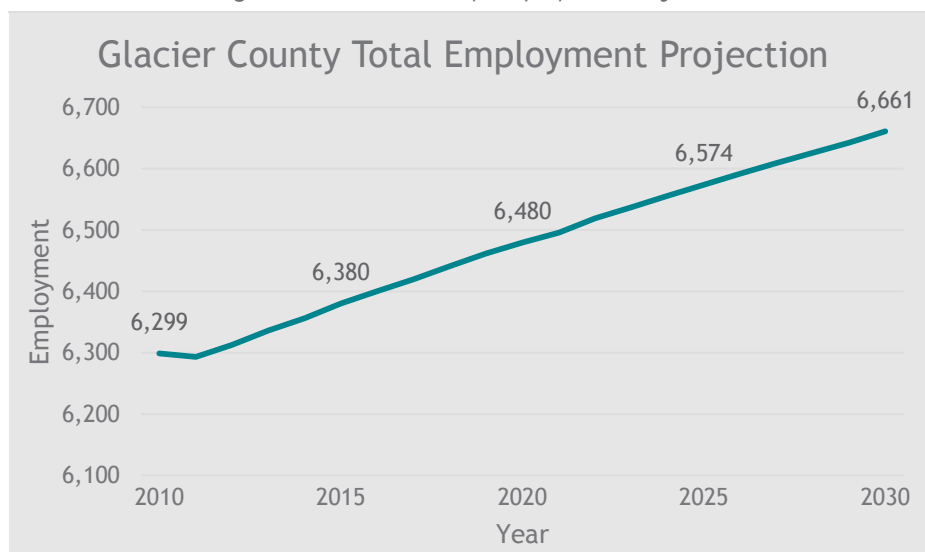
Employment within Glacier County is expected to increase by more than 100 jobs through 2020. Through interviews with businesses, KLJ identified approximately 106 jobs – 71 permanent and 35 temporary (employed less than 6 months during the year) – would be added throughout the county. It is estimated that the 100 jobs as forecasted by Woods & Poole is an accurate projection. The county could expect a total of 280 jobs through year 2030.

Glacier County is projected to be the second fastest growing county in terms of new jobs added in north-

central Montana. Data provided by Woods & Poole indicated a steady hiring trend for the next five years. However, when interview data is included, Glacier County is projected to be above Pondera County in terms of potential new jobs added, but below Cascade, Teton and Toole Counties. Business interviews indicated businesses are looking to add people, especially young professionals and middle-aged employees, as the baby-boomer generation begins retiring from the workforce. This was one of the greatest concerns for businesses moving forward in the next five years and will likely bring about substantial employment shifts in terms of working age professionals and backfilling roles with qualified personnel.

Approximately 40 percent of businesses interviewed stated finding qualified applicants was essential to growing a business and individuals with fabrication skills (including welders) would be needed most in the next five years. However, businesses noted that having a quality work ethic and the ability and willingness to learn were far more important when hiring, especially if the potential employee demonstrated an initiative to work.

Figure 26: Glacier County Employment Projections



Source: Woods & Poole

Figure 27: Glacier County Age Breakdown (1990, 2000, 2010)



Source: Woods & Poole

The working age of young professionals (25-34) and working professionals (35-44) has either remained steady or dropped during the past decade. This suggests that young people and young families are not gaining employment in the county and thus are not relocating to the area. Executive professionals (45-54) and senior professionals (55-64) have both risen through the past decade. This supports the businesses expressed during interviews: that young professionals with skill sets are difficult to attract while more experienced workers tend to stay in jobs longer and are delaying retirement. This trend makes it more difficult for businesses to backfill jobs and

attract new employees. Additionally, six businesses interviewed in Glacier County expressed plans to expand operations in the county or central Montana. More than 46 businesses interviewed in central Montana indicated plans to hire staff through the next five years.

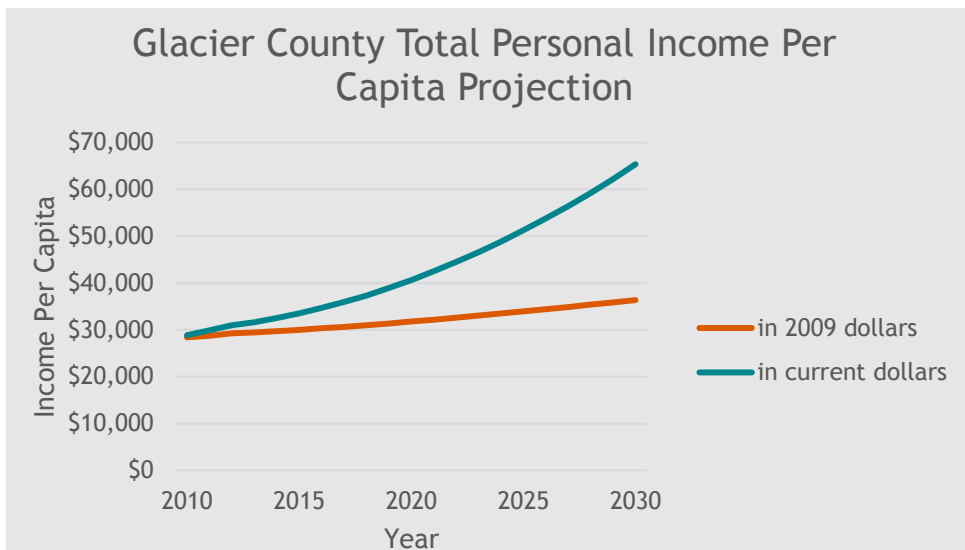
Earnings potential and personal incomes for workers within Glacier County are expected to steadily increase through 2030. The increase indicates that workers will continue to receive high wages for work performed especially after 2025. However, the county is well below the other four counties in the Sweetgrass Region and the

statewide average. Wages and personal income within the county are expected to be approximately \$5,000 to \$10,000 less than other counties and the State. Again, the positive trend is that incomes are projected to keep increasing.

Nearly 80 percent of businesses stated that they would increase wages to keep employees interested in work. This reduces the likelihood they would leave a job; however, these comments do not necessarily reflect actual trends as evidenced with the lower income earnings and projections for Glacier County.

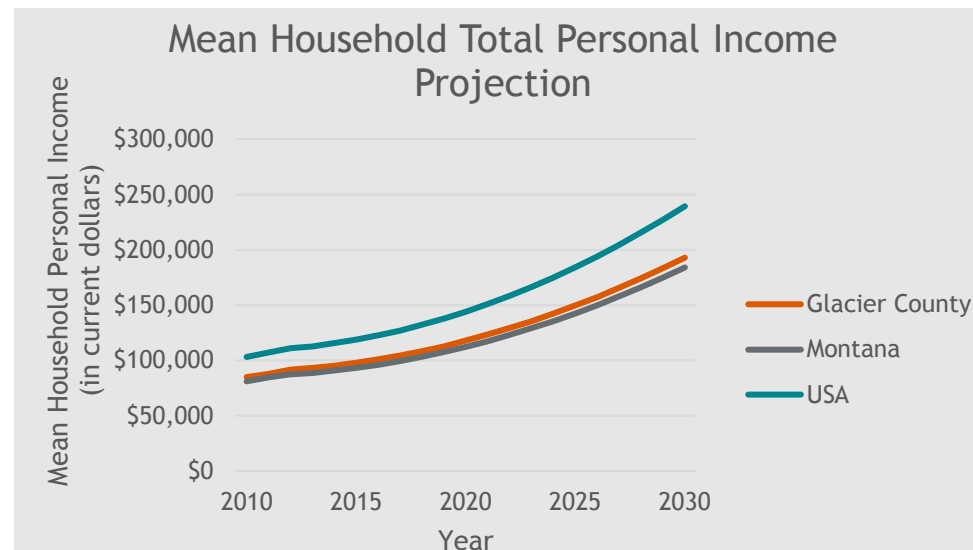


Figure 28: Glacier County Income per Capita Projections



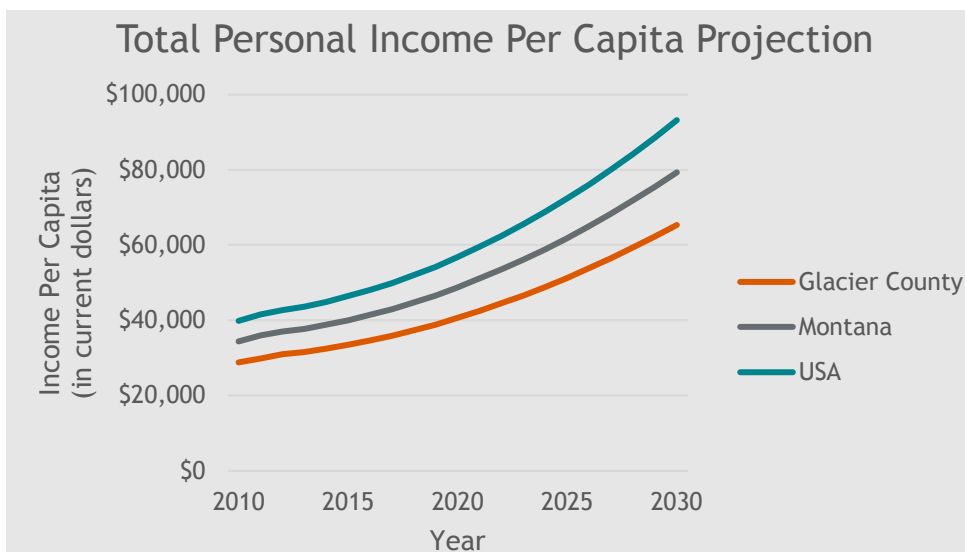
Source: Woods & Poole

Figure 30: Household Total Personal Income Projections



Source: Woods & Poole

Figure 29: Personal Income per Capita Projections



Source: Woods & Poole

## Housing

Similar to Cascade County, housing was the greatest impediment to future growth for businesses in Glacier County. Approximately 50 percent of businesses interviewed stated that housing was an issue for current and future employees. Although affordability was raised as a concern, the biggest housing issue was quality of housing for both rental and owner-occupied units. Specifically, quality homes – updated amenities and newer construction (post year 2000) – were major concerns to attract quality employees with families.

Multiple sources of information were used to determine housing needs for Glacier County including existing studies from the Montana Department of Commerce. KLJ also analyzed State of Montana information for potential new units to address growth and deteriorating structures.

As evidenced in the following tables and figures, Glacier County's housing is affordable for most professions; the only professions where homeownership affordability becomes an issue is for disabled workers and seniors relying on social security income. However, these two groups are estimated to be able to afford a manufactured home. Similarly, disabled workers and seniors/fixed income persons are the only two groups not able to afford rental prices in Glacier County. All other employment groups were able to afford both one and two-bedroom rental units.

Overall, housing prices have remained stable in Glacier County. Ownership units have not spiked in sales prices

but have steadily increased, whereas rental prices have shown to increase more than sales prices. Although realtors could not provide accurate rental prices for 2013, they did note that rental prices have remained relatively stable between \$400-\$500 for a one-bedroom unit and between \$500-\$625 for a two-bedroom unit.

Table 15: Glacier County Housing Affordability

Affordable Share of Income for Housing Various Occupations						
Select Occupations	2008			2010		
	Annual Income	Affordable Home Cost	Affordable Monthly Rent	Annual Income	Affordable Home Cost	Affordable Monthly Rent
2006-2010 Median Household Income	Not available			\$38,075	\$159,764	\$952
Average all Occupations	\$32,437	\$109,107	\$811	\$32,745	\$137,399	\$819
Registered Nurse	\$50,379	\$169,458	\$1,259	\$52,363	\$219,716	\$1,309
Police Officer	\$43,538	\$146,447	\$1,088	\$35,676	\$149,697	\$892
Elementary School Teacher	\$39,528	\$132,959	\$988	\$36,321	\$152,404	\$908
Retail Salesperson	\$24,777	\$83,341	\$619	\$23,152	\$97,146	\$579
Disabled Worker, SSI	\$10,370	\$34,881	\$259	\$10,505	\$44,079	\$263
Senior on fixed-income, SSI	\$12,389	\$41,672	\$310	\$12,432	\$52,167	\$311
Police Officer and Retail Salesperson	\$68,315	\$229,788	\$1,708	\$58,828	\$246,844	\$1,471
Two incomes: Two Teachers	\$79,056	\$265,918	\$1,976	\$72,642	\$304,807	\$1,816

Source: Montana Department of Commerce

Figure 31: Affordable Homeownership Trends

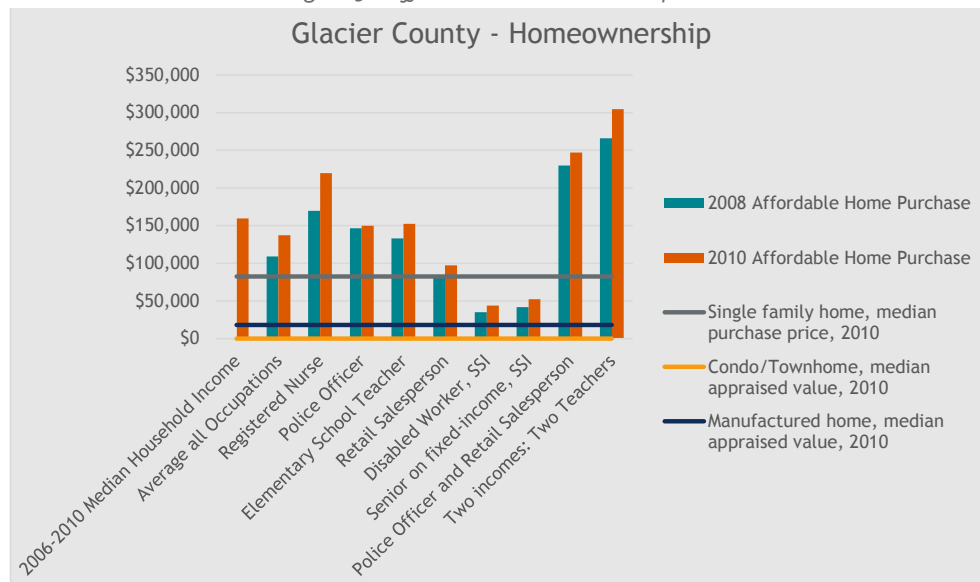


Figure 32: Affordable Rental Rate Trends

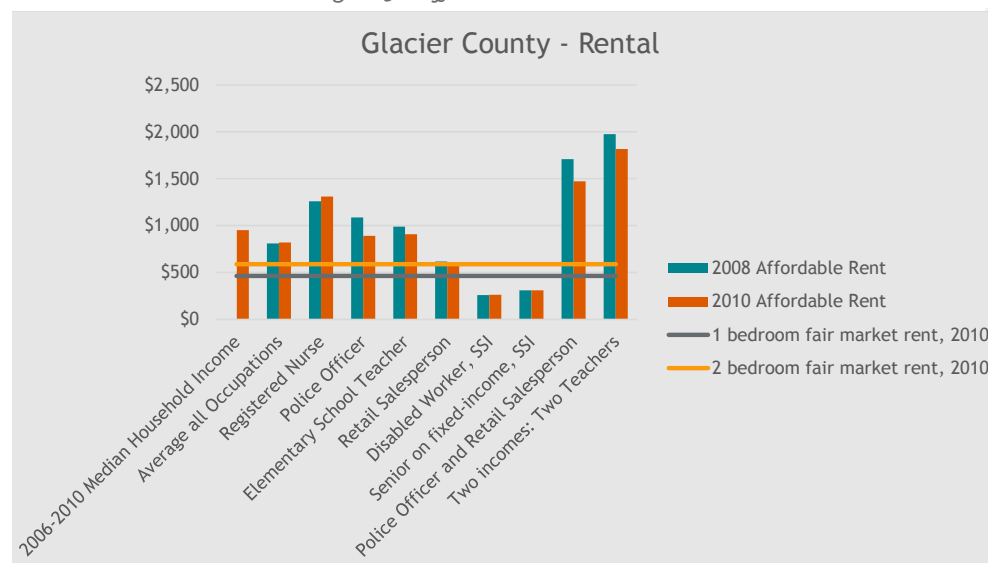


Table 16: Glacier County Change in Housing Affordability

Affordable Share of Income for Housing Various Occupations				
Single Family Median Home Cost	\$82,000	\$82,450	0.5%	
Condos & Townhomes Median Appraised Value	\$0	\$0	\$0	
Manufactured Home Median Appraised Value	\$17,490	\$18,260	4.4%	
1 Bedroom Fair Market Rent	\$439	\$464	5.7%	
2 Bedroom Fair Market Rent	\$557	\$588	5.6%	

When asked about worker characteristics to determine general housing needs, the vast majority of businesses stated employees would prefer to own a unit rather than rent. However, if temporary workers had an option to rent quality units – updated features and constructed post year 2000 – most businesses stated temporary employees would prefer that option. Some companies stated that rental housing (including townhome or duplex units) was actually preferred because of the turnover of workforce and the changing dynamics of workers staying fewer years at a job.

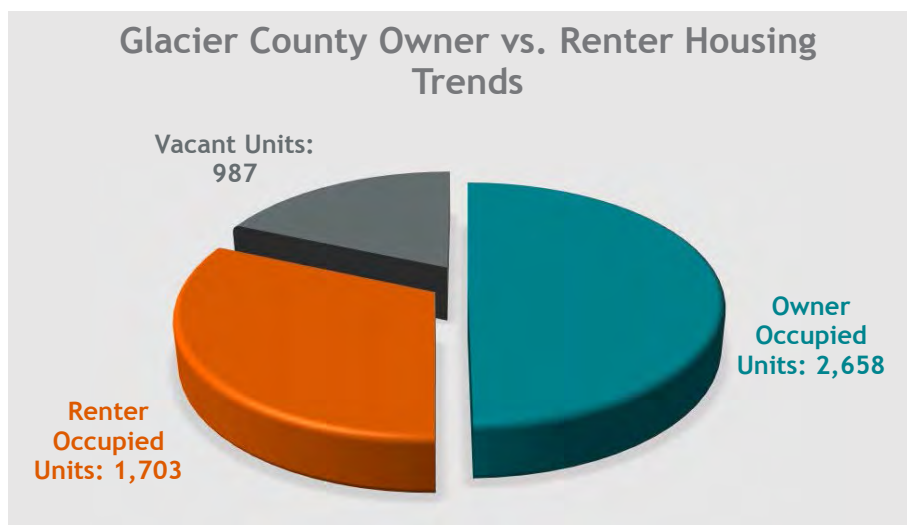
Based on the projected employment of more than 100 new jobs in Glacier County, KLJ concluded the county will have enough available housing to meet demand. Businesses were unable to confidently state where

expansion plans would occur or where new employees would be hired and would live. It is extremely difficult to project how many employees will live in the county in which they work or will find housing elsewhere. Nevertheless, KLJ estimated the number of new housing units needed based on population forecasts and the average household size. Woods & Poole data included an estimated household size projection; however, the Census does not include such numbers so the 2010 Census household size for eREMI projections was used.

Based on eREMI models and Woods & Poole data, Glacier County will need to add between 37 and 115 new housing units in the next five years to meet demand. When units in poor condition – units that need substantial improvements to make the structures livable – are

included in the overall estimate, then housing becomes a substantial investment. Improvements will need to be made so businesses can grow and the community can improve its quality of life. Information provided by the Department of Commerce indicates Glacier County had more than 22 percent of its housing in poor condition. When factoring in unmet housing needs, Glacier County will need to improve an additional 1,480 rental and owner-occupied units (or approximately 30-32 percent of total units) to meet unmet housing needs by 2020. When housing demand and unmet housing needs are combined, the county is projected to need nearly 1,600 units to meet demand and correct unmet housing needs.

Figure 33: Owner versus Renter Housing Trends



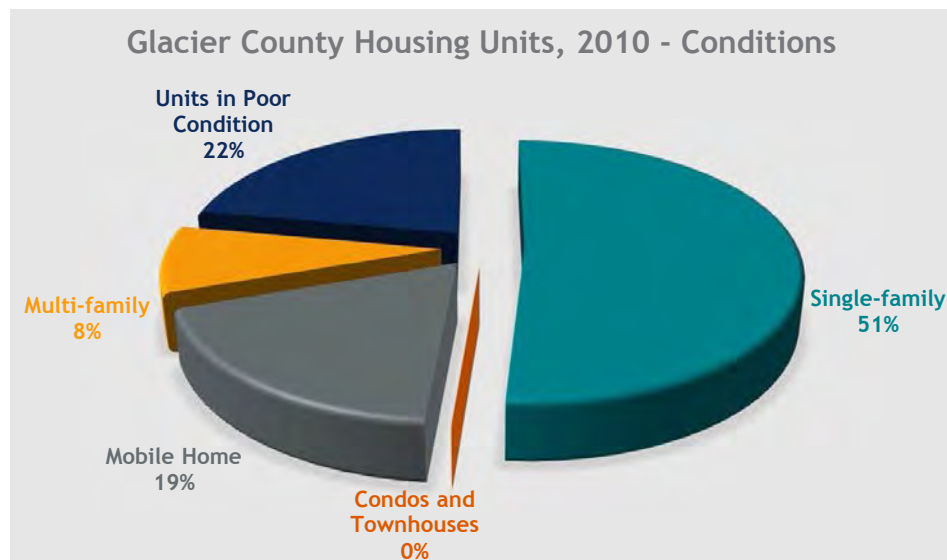
Source: Montana Department of Commerce

Table 17: Housing Unit Conditions, Glacier County

	Total Housing Units	Units in Poor Condition, 2010	% of Total	Units in Acceptable Condition, 2010	% of Total
Total housing units	3,700	817	22.1%	2,883	77.9%
Single-family	2,195	297	8.0%	1,898	51.3%
Condos and townhouses	0	0	0.0%	0	0.0%
Mobile home	713	34	0.9%	679	18.4%
Multi-family	792	486	13.1%	306	8.3%

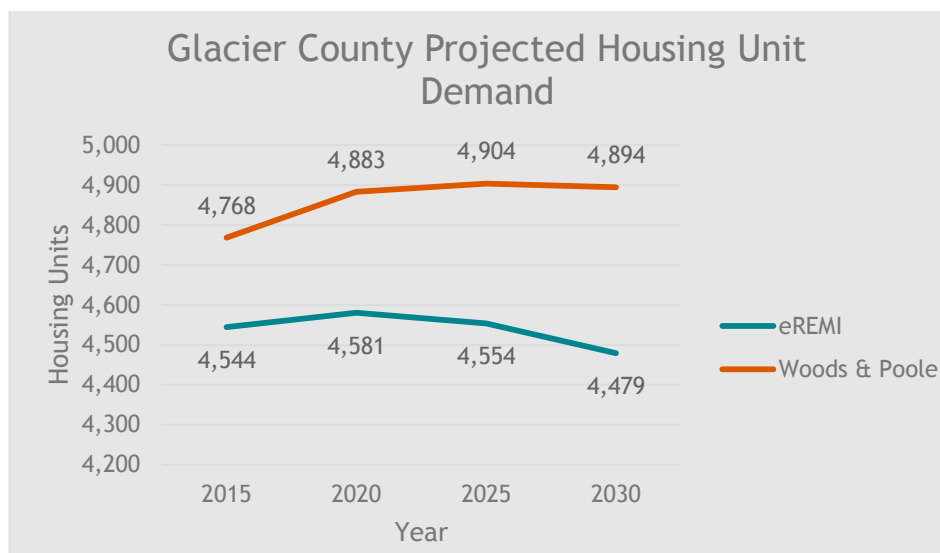
Source: Montana Department of Commerce

Figure 34: Housing Unit Conditions



Source: Montana Department of Commerce

Figure 35: Glacier County Projected Housing Unit Demand



Source: Woods & Poole, MT CEI

Table 18: Glacier County Projected Unmet Housing Needs

Percent of MFI	Total Renter and Owner				
	Elderly	Small Related	Large Related	Other	Total
<b>2015</b>					
0.0-50.0%	202	324	220	193	939
50.1-80.0%	19	88	130	30	268
80.1-95.0	0	0	0	0	0
Above 95.0%	4	78	130	41	254
<b>2020</b>					
0.0-50.0%	205	328	222	196	951
50.1-80.0%	19	90	132	30	272
80.1-95.0	0	0	0	0	0
Above 95.0%	4	80	132	41	257
<b>2025</b>					
0.0-50.0%	208	332	226	198	964
50.1-80.0%	19	91	134	31	276
80.1-95.0	0	0	0	0	0
Above 95.0%	4	81	134	42	260
<b>2030</b>					
0.0-50.0%	211	339	228	202	981
50.1-80.0%	19	93	136	31	281
80.1-95.0	0	0	0	0	0
Above 95.0%	4	82	136	42	265

Source: Montana Department of Commerce

Note: Rounding errors were noted in the Montana Housing Needs Assessment Report

## Infrastructure

Glacier County is expected to have approximately \$27.5 million in sewer and water impacts resulting from the expected growth as well as existing improvements to correct deficiencies. The county has both the highest projected sewer and water improvement costs throughout the region; yet, it is forecasted to have the slowest population gain. Some communities may even experience declining population as evidenced by the past two decades of population decline.

Cut Bank was the only community to respond to requests from KLJ, so the numbers do not include impacts associated with Browning or the Blackfeet Reservation. The numbers provided from Cut Bank include planned improvements to accommodate growth and include substantial improvements to the City's water system that will eventually connect to North Central Montana Rural Water's (NCMRW) system.

Sewer capacity for Cut Bank is the larger hindrance because a new treatment facility will be required in 2015. Water system improvements will allow Cut Bank to utilize Shelby's water for everyday use; Cut Bank will use its existing system to handle future growth. While the county has the highest projected water and sewer costs, it has the second most number of planned road improvements according to MDT. The vast majority of improvements are slated for US Highway 89 reconstruction, which will improve shipping routes for businesses in Browning.

Table 19: Glacier County STIP (2014-2018)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2014	STPP- FLA	BROWNING - WEST	US-89	5.73	RECONSTRUCTION	>5
2014	STPP- FLA	EAST OF KIOWA - EAST	US-89	4.13	RECONSTRUCTION	<1
2014	MT	ST MARY'S RD - SPIDER LAKE RD	L-18-224	2	RECONSTRUCTION	<1
2014	HSIP	SF 099 KIOWA CUTOFF SIGNING	MT-49	11.7	SIGNING - UPGRADE	<1
2014	STPE	SIDEWALKS - SE BROWNING	US-2,US-89	0.15	BIKE/PED FACILITIES	<1
2014	HSIP	SF 119 - GR S OF BROWNING	US-2,US-89	1	GUARDRAIL,SKID TREAT, BR	<1
2014	STPP	19KM NW GLCR CO LINE - EROSION	US-89	1.53	BANK STABILIZATION	<1
2014	NH	EAST GLACIER - WEST	US-2	4.66	CHIP SEAL	<1
2014	NH	CUT BANK - WEST	US-2	7.93	CHIP SEAL	<1
2014	STPS	DUCK LAKE ROAD - NORTH	S-464	11.59	CHIP SEAL	<1
2014	STPS	CUT BANK - NORTH	S-213	7.1	CHIP SEAL	<1
2014	STPE	2ND ST NW LANDSCAPE - CUT BANK			LANDSCAPING	<1
2014	RRP- RRS	RR XING - BLACKFOOT CUTOFF	L-18-211	0	RR CROSSING	<1
2015	STPP- FLA	EAST OF KIOWA - EAST	US-89	4.13	RECONSTRUCTION	<1
2015	MT	ST MARY'S RD-SPIDER LAKE RD	L-18-224	2	RECONSTRUCTION	<1

Table 19: Glacier County STIP (2014-2018) (continued)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2015	FLA- STPP	N OF KIOWA - N	US-89	6.2	RECONSTRUCTION	<1
2015	FLA- STPP	KIOWA JCT - N & S	US-89	4.63	RECONSTRUCTION	<1
2015	HSIP	SF 119 - GR S OF BROWNING	US-2,US-89	1	GUARDRAIL, SKID TREAT	<1
2015	NH	BROWNING SIGNALS	US-2,US-89	2.23	INT UPGRADE/SIGNALS	<1
2015	NH	BROWNING SIGNALS	US-2,US-89	2.23	INT UPGRADE/SIGNALS	<1
2016	STPP- FLA	EAST OF KIOWA- EAST	US-89	4.13	RECONSTRUCTION	>5
2016	MT	ST MARY'S RD - SPIDER LAKE RD	L-18-224	2	RECONSTRUCTION	1 TO 5
2016	FLA- STPP	N OF KIOWA - N	US-89	6.2	RECONSTRUCTION	<1
2016	MT-NH	CUT BANK URBAN	US-2	1.11	RECONSTRUCTION	>5
2016	FLA- STPP	KIOWA JCT - N & S	US-89	4.63	RECONSTRUCTION	<1
2017	NH	BROWNING SIGNALS	US-2,US-89	2.23	INT UPGRADE/SIGNALS	1 TO 5
2018	FLA- STPP	N OF KIOWA - N	US-89	6.2	RECONSTRUCTION	>5
2018	FLA- STPP	KIOWA JCT - N & S	US-89	4.63	RECONSTRUCTION	>5

Source: MDT

Table 20: Glacier County Sewer Improvements

Cascade County	Sewer System				
Community	Type of System	At Capacity	Expansion Costs	Additional Connections Available	Comments
Cut Bank	Lagoon	Yes	\$12.5 million	N/A	New force main constructed in summer 2014, new treatment facility summer of 2015.
Browning	N/A	N/A	N/A	N/A	N/A
Blackfoot (unincorporated)	N/A	N/A	N/A	N/A	N/A



Table 21: Glacier County Water Improvements

Glacier County	Water System				
Community	Water Source	At Capacity	Expansion Costs	Additional Connections Available	Comments
Cut Bank	Cut Bank Creek	Yes	Connecting to Shelby's system in the summer of 2015 (approximately \$15 million).	N/A	Using Shelby's water for normal everyday use and using existing source for additional capacity.
Browning	N/A	N/A	N/A	N/A	N/A
Blackfoot (unincorporated)	N/A	N/A	N/A	N/A	N/A

Table 22: Glacier County Landfill Status

Glacier County	Landfills	
Community	Name	Status
Cut Bank	Northern MT Joint Refuse Disposal District, Class II, Conrad, (Choteau Landfill Class III, Cut Bank Roll-Off Site Class III, Conrad Roll-Off Site Class III), Teton County Refuse Disposal District #1, Class III, Dutton & Power	The landfill is not at capacity. They purchased an additional 160 acres and have approximately 140 years of available space.
Browning		
Blackfoot (unincorporated)		

## Community Services

### LAW ENFORCEMENT

Glacier County reported that the staffing levels were not adequate to meet current demands for service. Ideally the County would have two additional deputies and a full-time detective to help with investigative needs and to make available patrol staff for normal responsibilities. There is also a need for additional dispatch staff to meet increased call volume and additional jail staff to allow both male and female staff on duty at all times to comply with standards.

Turnover of law enforcement staff is also a concern in the county. This is at least, in part, due to inadequate pay. Costs to increase staffing and provide the additional equipment and training is significant but will be required if the region experiences growth.

Facilities were reported to be adequate; however, the jail population has increased in recent months to the point that the facility was at capacity for a while.

One other issue specifically noted was concern regarding how to handle mentally unstable people who end up in jail. Essentially, the sheriff's department is not equipped to

handle instances of mental health issues and it would be beneficial to have a protocol to address these situations.

### FIRE DEPARTMENTS

#### BROWNING FIRE DEPARTMENT

The department has a staff of 22 volunteers but 25 volunteers with two alternates would be preferable. The department serves Glacier County, Heart Butte and portions of East Glacier. The department identified approximately \$2 million for a fire hall upgrade; \$200,000 for an aerial apparatus and needs 3-5 new fire suits per year with an estimated cost of \$3,000 per suit.

#### CUT BANK RURAL AND CITY FIRE DEPARTMENT

The departments are served by the same fire chief and volunteer crew. Staffing is approximately 25 volunteers, but due to people working out of town and other commitments during weekdays they may only have seven to eight responders. The rural department has three fire fighting vehicles, and the city has two additional pumpers. The department needs to replace its quick response unit, as the existing unit is beyond its useful life. Estimated cost for replacement is \$80,000-\$90,000.

#### EAST GLACIER FIRE DEPARTMENT

The department has 18 volunteers on its roster with approximately 10 very active members. They have a high turnover rate and have recently increased recruiting efforts and have gained five new volunteers. The department has four vehicles in operation but would like to replace one. The vehicle is an old tender that has a manual transmission and only one person in the department is able to operate the vehicle. The department would like to replace it with a 4x4 2,000 gallon tender that is estimated to cost approximately \$90,000. In addition, new turnout gear is essential. The equipment they have is roughly 10 years old; the cost for replacing this equipment may be \$50,000.

#### THE BABB-ST. MARY'S FIRE DEPARTMENT

The department has 24 volunteers, 12 of which are very active members. They have minimal turnover. The department has four fire fighting vehicles and would like to add a 2500 gallon tender which is likely to cost \$100,000-\$150,000. However, they do not have space to store the additional vehicle so it is impracticable to purchase the vehicle unless they can also add the additional storage area. The estimated cost for additional storage is approximately \$225,000. Recent development in the services area has increased the number of calls and more development is expected within the next year. Staff anticipate another 16 housing units in their service area. There have been some discussions about situating a fire truck at the border, but it would also require an additional storage location at an estimated cost of \$175,000.

Table 23: Glacier County Law Enforcement Needs

Glacier County Staff Needs	Quantity	Per Staff Training and Equipment Cost	Total Estimated Training and Equipment Cost	Annual Salary and Benefits
LE Staff	3	\$150,000	\$450,000	\$240,000
Detention Staff	2	\$70,000	\$140,000	\$120,000
Dispatch Staff	2	\$70,000	\$140,000	\$120,000

Table 24: Glacier County School Information

School District	Estimated Enrollment (K-12)	Student: Teacher Ratio	Facility Upgrade/ Expansion Costs	Issues
Browning	2,000	Unavailable	Unavailable	Shortage of Quality Teachers
Cut Bank	700	Unavailable	Capacity at 70%	Math & Science Teachers

## SCHOOLS

Schools in Glacier County have been experiencing similar trends as other rural counties in the Sweetgrass Region. Enrollments are either steady or slowly declining and all facilities have room to accommodate growth. Quality teachers in sciences and math are the most difficult positions to fill.

### BROWNING SCHOOL DISTRICT

The district has a K-12 student population of approximately 2,000 children with five education buildings in the district: one kindergarten, one for grades 1-3, one for grades 4-6, one for grades 7-8, and one fairly new high school. The high school building currently houses approximately 500 students but was built for 750.

No information on student-teacher ratios was available. Despite having some of the highest salaries in the state, recruiting teachers is difficult due to the lack of available housing.

Significant growth in the school district is not anticipated, so there is little expectation of need to add capacity. The district noted a large need for improvements or updates to the existing facilities, including constructing a

vocational education center. Since the district is on a Reservation, it has no property taxes; thus, project funding issues pertain to Federal budget decisions.

### CUT BANK SCHOOL DISTRICT

Cut Bank has a K-12 student population of approximately 700. At one time, the high school had 400 students but currently has less than 200 and continues to decrease. The elementary school has seen slow growth in student enrollment in recent years but could still accommodate an increase of 30 percent in classrooms.

No information on student-teacher ratios was available. The district has found that as long as they are aware of the need to hire well in advance of the next school year, they typically do not have difficulty recruiting teachers.

Significant growth in the school district is not anticipated. The buildings are in fairly good shape as they have a program of annual maintenance. If growth were to happen beyond the 30-50 percent capacity, the school would require additional space, but the district had no data regarding the type or cost of improvements.

## HOSPITALS, CLINICS AND EMS

Northern Rockies Medical Center in Cut Bank is a critical

access hospital that serves most of Glacier County. Staffing tends to be more stable than in the other counties although nurses, especially registered nurses (RNs), are very difficult to attract and retain. The facility is in decent shape but needs to update equipment, especially emergency medical equipment. The medical center would be able to support potential growth if it occurs, but staff indicated that growth – substantial growth – is not likely to happen unless a major economic event occurs in the area.

Glacier County is also served by the Blackfeet Community Hospital in Browning. The hospital is an Indian Health Service facility, and is actually the largest facility in the study area outside of Great Falls. Staffing is a huge concern for this hospital and is inadequate for the service demand. The Native American population has a large need for services including more than 400 cancer patients, high incidence of diabetes and high alcoholism rates. The emergency services department at the Blackfeet Community Hospital may be busier than all the remaining hospitals outside of Great Falls combined.

Glacier County EMS will begin implementing IMH, which is providing home care to patients to reduce the infiltration and overwhelming of emergency rooms, to keep patients healing in their own homes and to gear patient care to be maintained by a primary care provider. Therefore, EMS is changing the outlook of all patients transported to a hospital and instead, may provide some home care that could affect staffing. Although, the change in policy could increase demand with population growth and increase facility needs. EMS is projected to

add 11 additional staff over the next five years to keep pace with current levels of service. Additionally, increased call volume is directly linked with ambulances, which will have to be upgraded and replaced.

## Strategies

### EMPLOYMENT

- » Collaborate with workforce development programs, especially with University of Great Falls and Great Falls College MSU, to create skilled-trade training programs for the following:
  - » Diesel mechanics
  - » Precision manufacturing
  - » Welders
  - » Accountants
  - » Nursing and health care staff
  - » Semi-truck drivers
- » Create scholarships for local students/youth to local/regional educational facilities or trade schools coupled with internships at local businesses to encourage youth to stay in the community. The program could be expanded to 2nd and 3rd year students from outside the region to encourage them to stay as well.
- » Provide for education debt repayment for both traditional and trade schooling for younger employees willing to stay or relocate to the region.
- » Improve apprentice programs for trades (diesel mechanics, manufacturing, welders, electricians, plumbers and truck drivers) and encourage youth to move into and advance in these vital fields.

- » Develop a middle and high school career day with focus on the trades. Not every student has the goal of going on to higher education and should find the same level of encouragement to pursue work in the trades.
- » Cut Bank, Browning and East Glacier should begin marketing their communities as tourist destinations to help spur additional job growth related to tourism industries.

### HOUSING

- » Begin addressing affordable housing for middle-income persons including teachers, law enforcement and small business owners.
  - » Policies may include inclusionary zoning, incentive based programs such as density bonuses or funding stream revenues from public agencies.
- » Coordinate with NeighborWorks Montana to find appropriate housing policies and affordable housing developers to begin developing a county-by-county plan on where to construct units.
- » Identify units in poor condition and units with unmet needs to create a working database that can be shared across the region; utilize HOME grants and low-interest or revolving loans funds to begin rehabilitating such structures.
- » Implement an education program on the 'rungs of home ownership' would be beneficial in each jurisdiction. Several employers stated that employees want more modern rentals and newer homes. The stark reality is that homes/apartments, which meet these definitions, typically rent/sell for more than what had traditionally been affordable.

- » Implement programs to acquire, renovate and remarket dwellings/rentals that are deemed to be substandard. Groups like NeighborWorks or the Montana Home Ownership Network may be able to help modernize and then sell or lease units. Lease-to-own programs on renovated housing should be considered.
- » Allow for modular homes, which are not manufactured homes, in zoning codes. Many modular homes are being built to the 2012 International Building Code Council Residential standards. This is a higher standard than is required by the State of Montana via the Building Code and therefore modular homes tend to be more energy efficient.
- » Consider via each jurisdiction's Growth Policy and subdivision regulations to create developments that provide a mixture of lot sizes and permitted number of dwellings on a given lot. This is especially effective in areas where water and/or sewer is available to the lot.
- » In more rural areas consideration should be given to having Montana State Subdivision Law revised to allow for the creation of ½-acre lots with shared water and on-site septic systems. However, this would require changes to Montana state law and DEQ rules.
- » Business should, if possible, pursue options for telecommuting to improve quality of life and reduce transportation costs.
- » Create workforce housing near schools and business centers to address housing needs; jurisdictions should consider implementing workforce housing programs to offer incentives for affordable housing.

## INFRASTRUCTURE

- » Prepare Capital Improvement Programs and related Preliminary Engineering Reports to support need for improvements.
  - » CIP and PERs should be used for grant funding mechanisms.
- » Develop impact fees to offset improvement costs with the money that is being spent, or needs to be spent, to improve or expand capacity. Service providers should consider impact fees or other form of capital reserves to defray costs of future expansions or replace capacity that is incrementally reduced with development. This is very important given the massive costs associated with improvements to water and waste water treatment systems and the dramatic reductions in grant funding to help pay for the required improvements/expansions.
- » Create and implement a comprehensive Capital Improvements Plan for jurisdictions, including water/sewer districts to help prioritize projects and establish user rates and potential increases.
- » Determine if user rates are in line with rates expected by Montana DEQ. End user rates for water/sewer are very important in obtaining grant.
- » Local governing bodies should analyze the status of local roads and streets and develop options to fund long-term maintenance. Quality local roads encourage quality development.
- » CDBG via the State of Montana Department of Commerce funds several Planning Grants on an annual basis. The Planning Grants are typically first come first serve.

» CDBG also provides competitive construction grants that are administered at the state level. While the grants require a low to moderate income benefit there are ways to bring these funds into the most affluent communities.

## LOCAL SERVICES

- » Develop a nursing job shadow program with the ability to train RNs in the Great Falls area with an emphasis on serving critical access hospitals.
- » Implement law enforcement and fire district capital improvements including funds for personal protection equipment into the County's CIP to help offset costs.
- » Develop an incentive program for volunteer fire firefighters such as pay per response.
- » Collaborate with fire departments across the region including all five counties to explore joint/inter-local agreements to supplement a declining volunteer force.
- » Create a grant funding database for specific services to apply for and utilize Sweetgrass Development as the primary grant coordinator.
- » Cut Bank and Glacier County have a unique opportunity to work cooperatively with the Tribes on such items as fire, law enforcement and streets.
- » Explore the option of utilizing Payment in Lieu of Taxes (PILT) from the Federal Government to fund large capital improvements by setting aside the funds rather than using them to balance budgets.
- » Cut Bank, Browning, East Glacier and Glacier County can explore the possibility of becoming a Resort Tax

Community as provided by Montana Law. Cut Bank has less than 5,000 population and it is located on a major route to Glacier Park. Resort Tax funding can be used to dramatically reduce the tax and user fees assessed at the local level or help fund needed community improvements.

- » Fire departments and EMS should pursue FEMA Grants and other Public Safety Grants available from the State of Montana (MDT and DOJ) to upgrade their radios and other communication equipment to solve communication problems.

## Overview

Conrad, Pondera County's seat, is the economic center for the county; however, the majority of businesses identified did provide services outside Conrad or throughout the county and Sweetgrass Region. As noted earlier, jobs were assigned to each county based on where the headquarters or primary business office was located for each company interviewed and does not necessarily reflect the actual distribution of job growth throughout the region. However, assigning job numbers was crucial to estimate impacts and to determine if employment and population forecasts were in line with separate data entities such as Woods & Poole and eREMI.

## Impact Summary

Pondera County is expected to have the fewest number of new jobs created based on interviews as well as from forecasts supplied by Woods & Poole. The trends indicate a stable workforce and a continuing, albeit slow, population growth through the year 2020. Population estimates range between adding nearly 30 people by 2020 to more than 260 in the same time frame. As noted, population and employment are both expected to continue to increase slowly through 2030.

Through businesses interviews, the county is expected to have 38 new

jobs in the next five years; 36 are classified as permanent jobs and two are classified as temporary (employed less than six months during a year).

Similar to other rural counties, employers noted difficulties attracting employees with qualified skills, especially welders, diesel mechanics and truck drivers with CDL endorsements. The county is projected to have the fourth highest rate of wage increase behind Cascade, Teton and Toole Counties. However, the County is still projected to be above the state average for annual wage growth.

Housing is affordable for the vast majority of job earners as only disabled workers and seniors on fixed incomes, were identified as not being able to pay for affordable (30 percent of gross income) housing units. Private employers stated quality housing was generally not an issue for recruitment although more than 65 percent of businesses interviewed, noted that single-family homes between \$130,000-\$180,000 were near impossible to find throughout the county.

Infrastructure improvements totaled \$13.1 million with \$8.5 million slated for water improvements for Brady, Dupuyer and Ledger – all unincorporated towns. Conrad has adequate water and sewer supply to handle projected growth for the entire county if needed.

Law enforcement, fire departments, schools and hospitals all are able to support growth if it should occur as most facilities do not need major expansions. Valier and Conrad school districts could accommodate 300 percent and 300 more students respectively. Fire

departments and hospitals, while not requiring large facility expansions, are in critical need of more staff and stated they would have a difficult time keeping current service levels, if growth occurs in the next five years.

## Population

Similar to Cascade and Teton Counties, which are expected to have steady growth through 2030, Pondera County is expected to add between 30 and 260 people in the next five years according to two different population projections. Woods & Poole, which uses a historic growth rate, projects a conservative growth rate of approximately 30 people through year 2020 and only 42 people through 2030. However, the Montana CEIC, which utilizes more localized data, forecasts the County will add more than 260 people through 2020 and nearly 630 by year 2030. Unlike Glacier and Toole Counties, which are expected to peak in population in year 2025, Pondera County is expected to continue to grow through 2030, yet one scenario accounts for less than one percent growth as compared to nine percent growth during the same time period.

Information gleaned from business interviews and community stakeholders suggested that some sectors such as business expansion, will continue to bring new people to the area. However, school enrollments and hospital staffing show a continuing decline in students and staff, but that the decline is either slowing or tapering off to current level. This suggests that the county may experience growth in the next five years.

As noted in the graphs, Conrad and Valier are the only

The estimated employment growth for the County through 2020 includes:

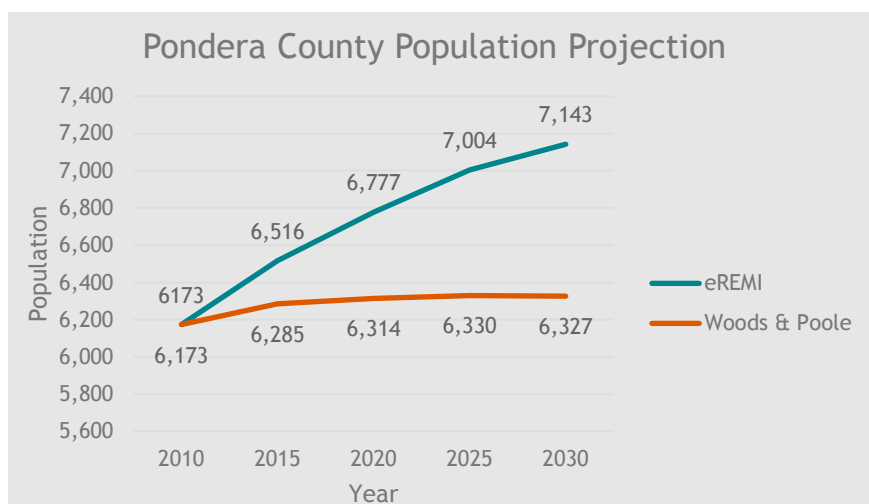
- 36 permanent jobs
- 2 temporary jobs
- 38 total jobs



# PONDERA COUNTY

two incorporated towns and account for approximately 50 percent of the total county population. Trends from the past two decades show a continuing decline in Conrad and the county, whereas Valier actually added population. Since future forecasts show growth, it is difficult to assess where growth may actually occur; however, if using the same population allotment as from the 2010 US Census, then both Conrad and Valier could expect to receive 50 percent of the projected population growth in the next five years.

Figure 36: Pondera County Population Projections

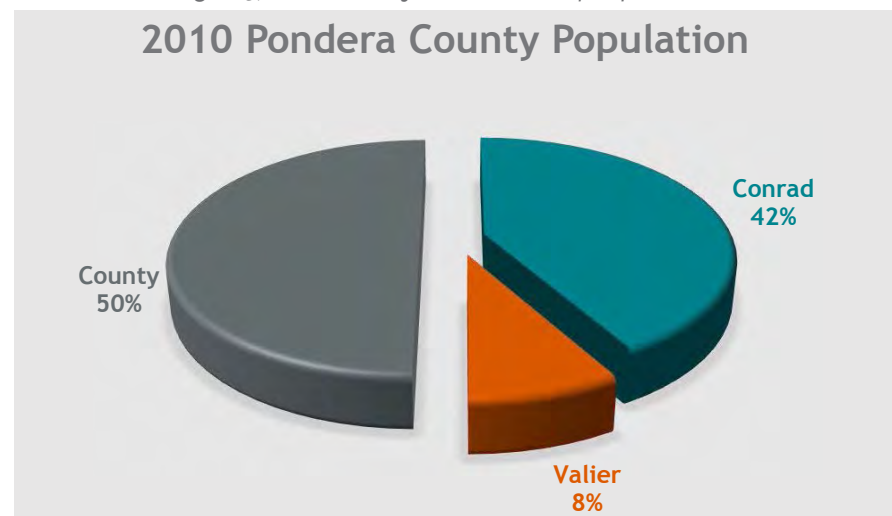


Source: Woods & Poole, Montana Department of Commerce

Table 25: Pondera County Population Change (%)

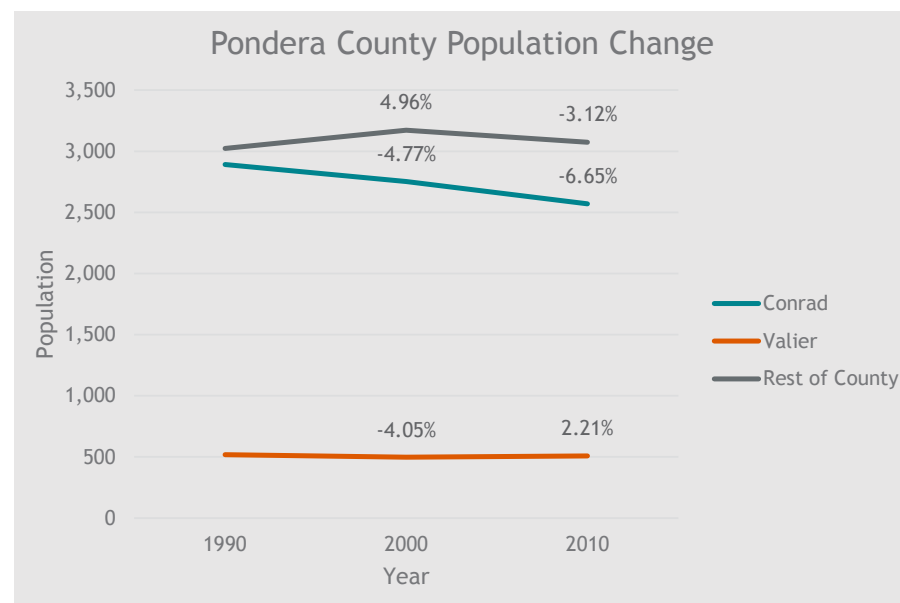
Population Change				
City	1990-2000		2000-2010	
Conrad	-138	-4.77%	-183	-6.65%
Valier	-21	-4.05%	11	2.21%
Rest of County	150	4.96%	-99	-3.12%
Pondera County Total	-9	-0.14%	-271	-4.22%

Figure 37: Allocation of Pondera County Population



Source: Woods & Poole, Montana Department of Commerce

Figure 38: Pondera County Population Change



Source: US Census

## Employment

Pondera County is expected to add 61 jobs through 2020 as identified by Woods & Poole employment projections. Through interviews with businesses, 38 jobs were identified – 36 permanent and 2 temporary (employed less than 6 months during the year) – would be added throughout the County. It is estimated that the 61 jobs as forecasted by Woods & Poole is an accurate projection, but that the county could expect more than 160 additional jobs through year 2030.

Pondera County is projected to be the slowest-growing economy in terms of new jobs added in north-central Montana. Data provided by Woods & Poole, indicated a very slow hiring trend for the next five years. The county is also expected to add the fewest amount of jobs as identified through company interviews. As noted in interviews across the region, businesses are looking to add people, especially young professionals and middle-aged employees, as the baby-boomer generation begins retiring from the workforce. This was one of the greatest concerns for businesses moving forward in that the next five years and will likely bring about substantial employment shifts in terms of working age professionals and backfilling roles with qualified personnel.

Approximately 70 percent of businesses interviewed stated finding qualified applicants was essential to growing a business and individuals with welding, diesel mechanic and accounting skills would be needed most in the next five years. Businesses noted that having

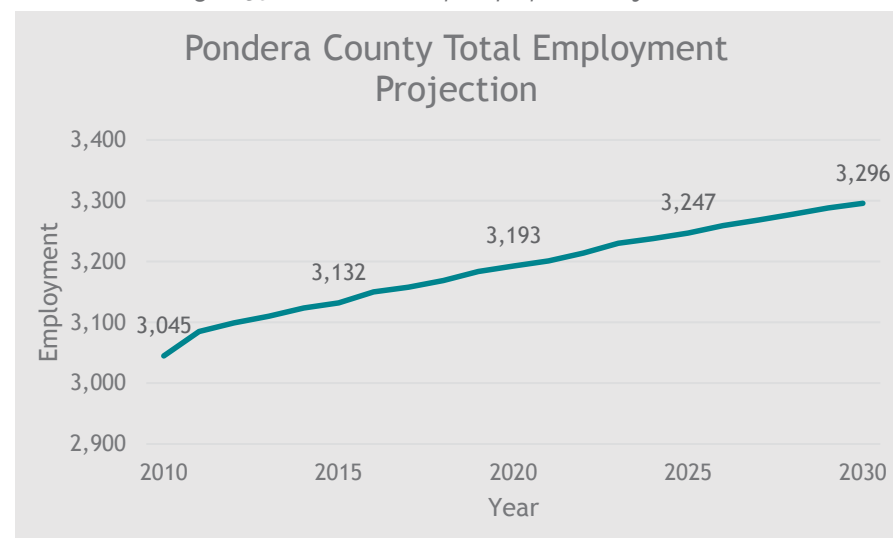
a quality work ethic and the ability and willingness to learn were far more important when hiring, especially if the potential employee demonstrated an initiative to work. Two businesses even noted that they would train the right person to fit the skills they needed, even if the individual had no experience for truck driver and welder jobs.

The working age of young professionals (25-34) and working professionals (35-44) has either remained steady or dropped during the past decade, suggesting that young people and young families are not gaining employment in the county and hence are not relocating to the area. Executive professionals (45-54) and senior professionals (55-64) have both risen through the past decade indicating concerns businesses expressed during

interviews: that young professionals with skill sets are difficult to attract while more experienced workers tend to stay in jobs longer and are delaying retirement. This trend makes it more difficult for businesses to backfill jobs and attract new employees. Additionally, only three businesses interviewed in Pondera County expressed plans to expand operations in the county or central Montana, and more than 50 businesses interviewed in central Montana expressed plans to hire staff through the next five years.

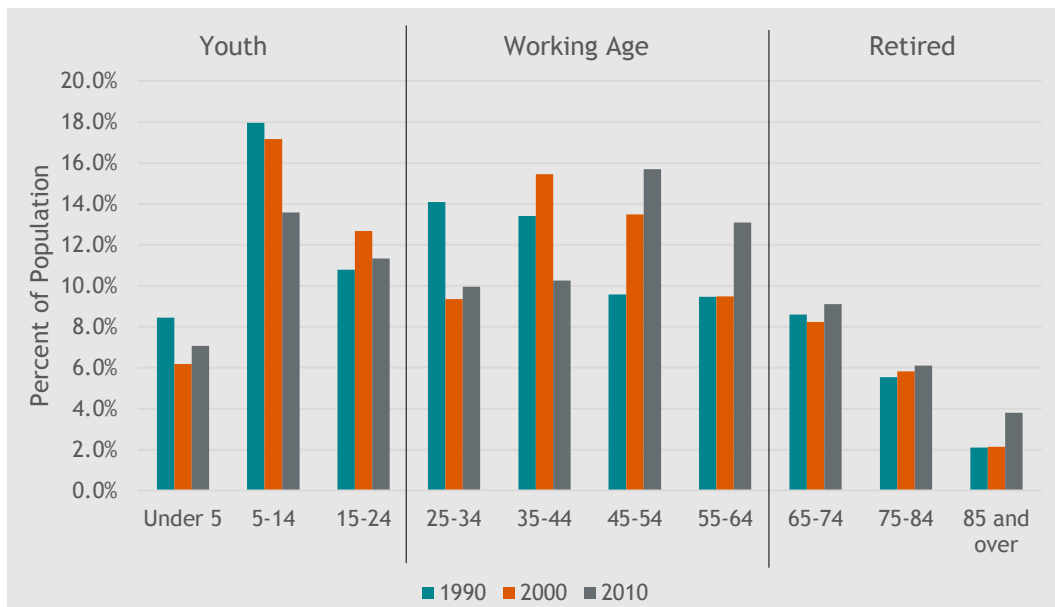
Earnings potential and personal incomes for workers within Pondera County are expected to steadily increase through 2030, indicating that workers will continue to receive high wages for work performed especially after 2025. Pondera County is above or even within the

Figure 39: Pondera County Employment Projections



Source: Woods & Poole

Figure 40: Pondera County Age Breakdown (1990, 2000, 2010)



Source: Woods & Poole

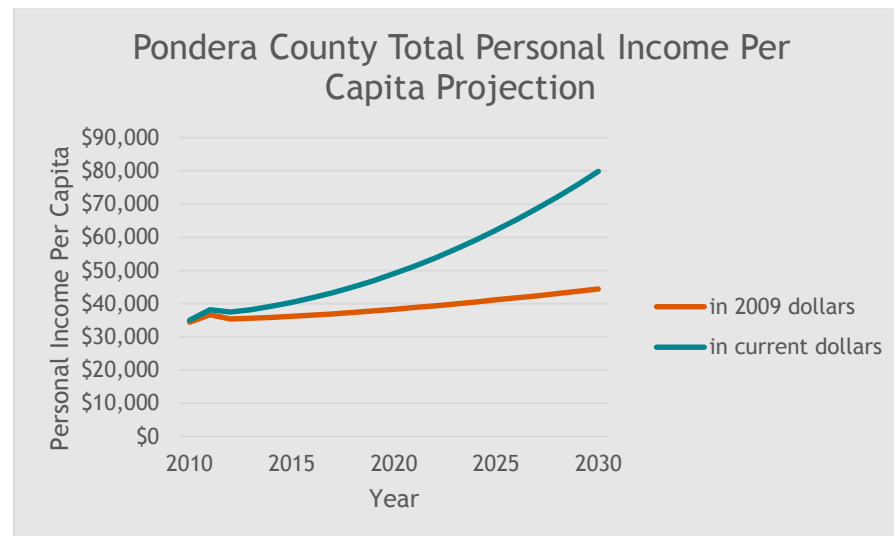
statewide average for personal income growth. Wages and personal income in the county are expected to be approximately \$5,000 more than Glacier County but \$2,000-\$5,000 less than other counties in the region. The positive trend is that incomes are projected to keep increasing and keep pace with the statewide average.

Unique to Pondera County, all businesses stated that they would increase wages to keep employees interested in work and to reduce the likelihood they would leave a job. Three businesses mentioned they would also include a hiring bonus if the right candidate was hired and signed a contract to work at least a year.

## Housing

Similar to all counties in the Sweetgrass Region, housing was the greatest impediment to future growth for businesses in Pondera County. Approximately 65 percent of businesses interviewed stated that housing was an issue for current and future employees. Affordability and quality housing were the two largest housing issues raised in interviews. Quality homes – updated amenities and newer construction (post 2000) – that are affordable (\$130,000-\$180,000) were a chief concern for being able to attract quality employees with families.

Figure 41: Total Personal Income per Capita, Pondera County

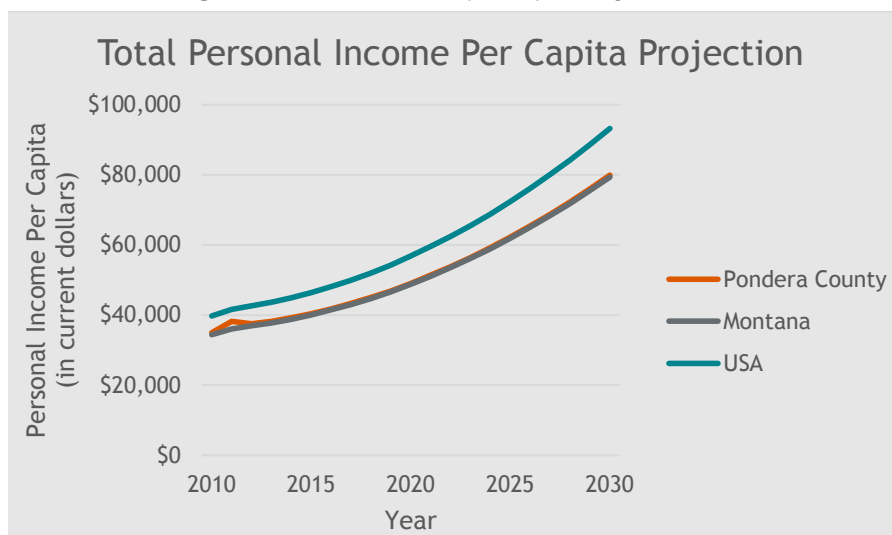


Source: Woods & Poole

Multiple sources of information were used to determine housing needs for Pondera County; these include existing studies from the Montana Department of Commerce and KLJ's analysis of State of Montana data for potential new units to address growth and replace units in poor condition.

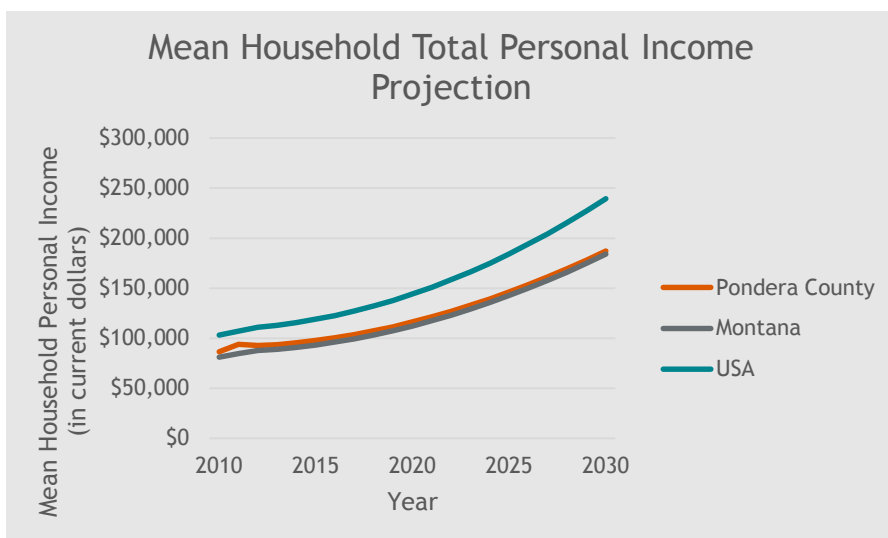
As evidenced in the following tables and figures, Pondera County's housing is affordable for most professions; the only professions where single-family homeownership affordability becomes an issue is for disabled workers and retired seniors on social security income. All identified employment groups are estimated to be able to afford a

Figure 42: Personal Income per Capita Projections



Source: Woods & Poole

Figure 43: Household Total Personal Income Projections



Source: Woods & Poole

manufactured home in the county. Disabled workers and seniors on fixed income are the only two groups not able to afford rental prices in Pondera County. All other employment groups were able to afford both one and two-bedroom rental units in 2010.

Overall, housing prices have remained relatively stable in Pondera County; although according to two realtors, the last two years have seen housing prices increase similar to what they were before the recession in 2008. Single-family homes have risen 16 percent from 2008 to 2010 and were estimated to be between \$75,000-\$85,000 in 2013, according to local realtors. While ownership unit sales prices have increased the past two years, rental prices have remained stable. While realtors could not provide accurate rental prices for 2013, they did note that rental prices have remained near \$500 for one-bedroom units and \$600 for two-bedroom units. According to a recent study, rental prices increased approximately five percent from 2008 to 2010.

Table 26: Pondera County Housing Affordability

Affordable Share of Income for Housing Various Occupations						
Select Occupations	2008			2010		
	Annual Income	Affordable Home Cost	Affordable Monthly Rent	Annual Income	Affordable Home Cost	Affordable Monthly Rent
2006-2010 Median Household Income	Not available			\$36,419	\$152,815	\$910
Average all Occupations	\$32,437	\$109,107	\$811	\$32,745	\$137,399	\$819
Registered Nurse	\$50,379	\$169,458	\$1,259	\$52,363	\$219,716	\$1,309
Police Officer	\$43,538	\$146,447	\$1,088	\$35,676	\$149,697	\$892
Elementary School Teacher	\$39,528	\$132,959	\$988	\$36,321	\$152,404	\$908
Retail Salesperson	\$24,777	\$83,341	\$619	\$23,152	\$97,146	\$579
Disabled Worker, SSI	\$12,209	\$41,066	\$305	\$11,556	\$48,487	\$289
Senior on fixed-income, SSI	\$12,702	\$42,724	\$318	\$12,905	\$54,150	\$323
Police Officer and Retail Salesperson	\$68,315	\$229,788	\$1,708	\$58,828	\$246,844	\$1,471
Two incomes: Two Teachers	\$79,056	\$265,918	\$1,976	\$72,642	\$304,807	\$1,816

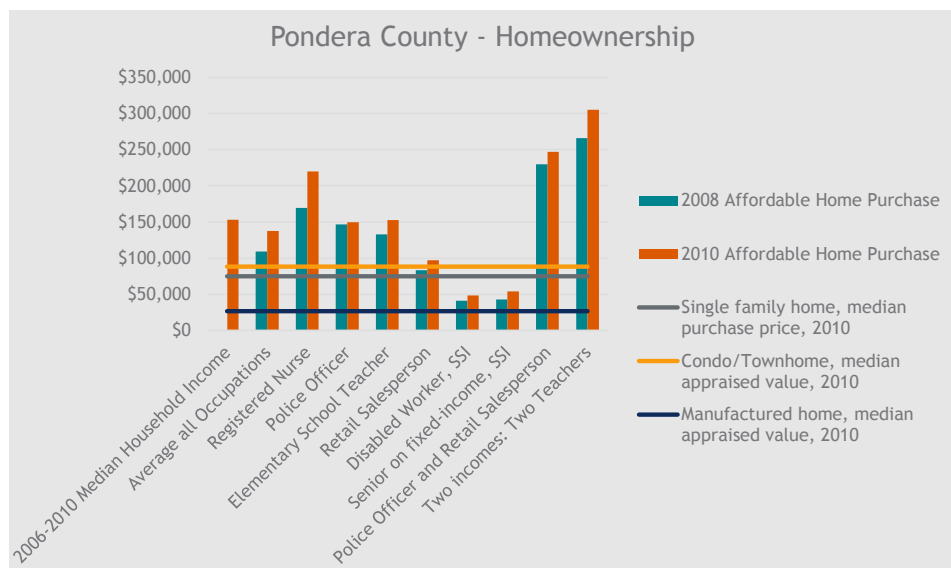
Source: Montana Department of Commerce

Table 27: Pondera County Change in Affordability

	2008	2010	% Change
Single Family Median Home Cost	\$66,000	\$74,950	13.6%
Condos & Townhomes Median Appraised Value	\$88,070	\$88,070	0.0%
Manufactured Home Median Appraised Value	\$25,580	\$26,490	3.6%
1 Bedroom Fair Market Rent	\$439	\$464	5.7%
2 Bedroom Fair Market Rent	\$557	\$588	5.6%

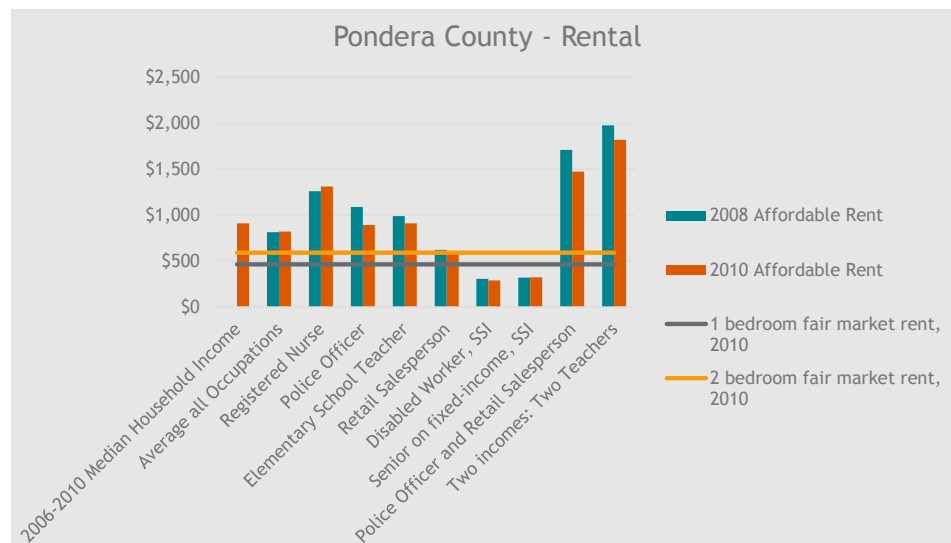
Source: Montana Department of Commerce

Figure 44: Affordable Homeownership Trends



Source: Montana Department of Commerce

Figure 45: Affordable Rental Rate Trends



Source: Montana Department of Commerce

Table 28: Population and Structure Data

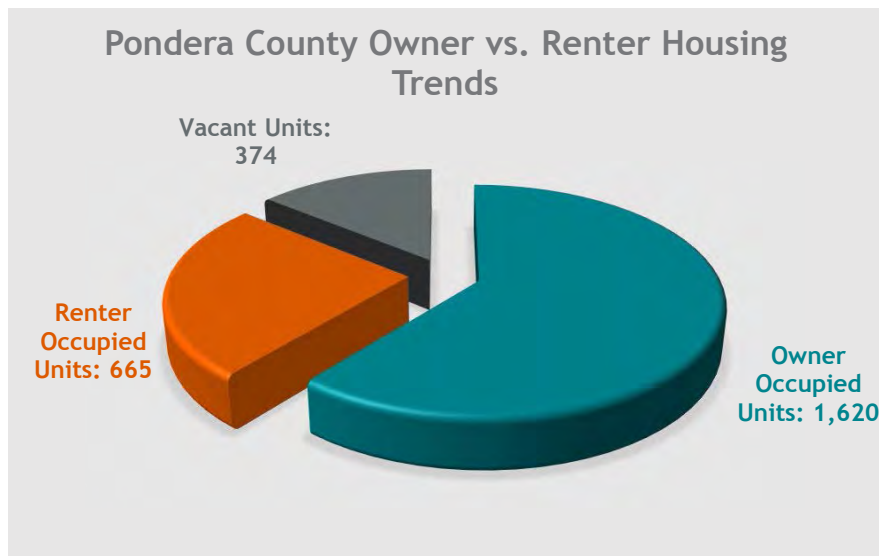
Pondera County Population and Structure Data, 2010 Census			
	2000	2010	% Change
Homeownership Rates:	70.2%	70.9%	
Population:	6,424	6,153	-4.2%
Owner Occupied Units:	1,699	1,620	-4.6%
Renter Occupied Units:	711	665	-6.5%
Total Households:	2,410	2,285	-5.2%
Vacant Units:	424	374	-11.8%

Source: Montana Department of Commerce

When asked about worker characteristics to determine general housing needs, employers had a mixed response, with approximately 40 percent stating rental units would be more preferable for their workforce and 60 percent noted single-family homes were more preferable. As noted from other interviews across the region, temporary workers would prefer to rent quality units with updated features and constructed post year 2000. Similar to Glacier County, some companies stated that rental housing including townhome or duplex units would be preferred, because of the turnover of workforce and the changing dynamics of workers staying fewer years at a job.

KLJ concluded that Pondera County will have enough available housing to meet employment demand based on the projected employment of more than 38 new jobs in the county through the year 2020. Businesses were unable to confidently state where expansion plans would occur or where new employees would be hired and would live; therefore, it is extremely difficult

Figure 46: Owner versus Renter Housing Trends



Source: Montana Department of Commerce

to project how many employees will live in the county in which they work or whether they will find housing elsewhere. KLJ estimated the number of new housing units needed based on population forecasts and the average household size. Two projections were used. Woods & Poole data included an estimated household size projection; however, the Census does not include such numbers so KLJ used the 2010 Census household size for MT CEIC projections.

Based on MT CEIC models and Woods & Poole data, Pondera County will need to add approximately 70 to 100 new housing units in the next five years to meet demand. However, when units in poor condition – units that need substantial improvements to make the structures livable – are included in the overall estimate, then housing

becomes a substantial investment so businesses can grow and the community can improve its quality of life.

Information provided by the Department of Commerce indicates Pondera County had more than 16 percent of its housing in poor condition in 2010. When factoring in unmet housing needs, Pondera County will need to improve an additional 640 rental and owner-occupied units or approximately 24 percent of total units to meet unmet housing needs by 2020. When housing demand from population

and employment growth and unmet housing needs are combined, the county is projected to need 710 to 740 housing units to meet demand and correct unmet housing needs.

Table 29: Housing Unit Conditions, Pondera County

	Total Housing Units	Units in Poor Condition, 2010	% of Total	Units in Acceptable Condition, 2010	% of Total
Total housing units	2,479	400	16.1%	2,079	83.9%
Single-family	1,859	276	11.1%	1,583	63.9%
Condos and Townhouses	1	0	0.0%	1	0.0%
Mobile Home	402	25	1.0%	377	15.2%
Multi-family	217	99	4.0%	118	4.8%

Source: Montana Department of Commerce

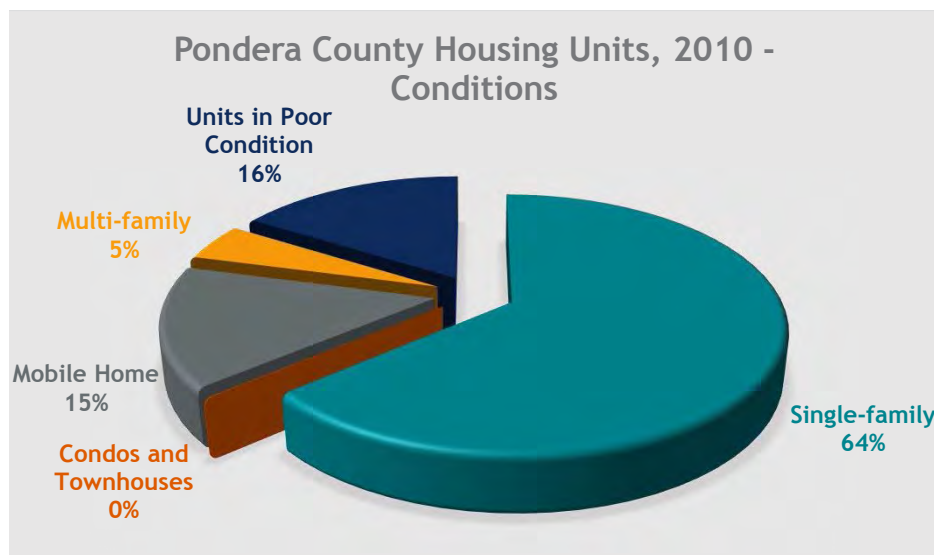
Table 30: Housing Unit Type

Housing Unit Type	
1 Unit Detached	1,757
1 Unit Attached	43
2 Units	75
3-4 Units	26
5-9 Units	102
10-19 Units	31
20 or more Units	67
Mobile Homes	202
Boat, RV, van, etc.	0
<b>Total</b>	<b>2,303</b>

Source: US Census Bureau, 2008-2012, American Community Survey

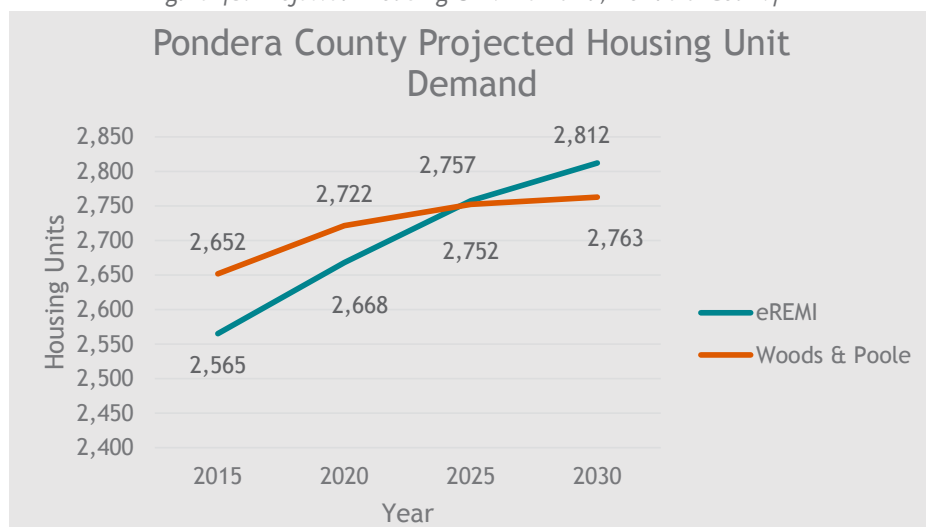


Figure 47: Housing Unit Conditions



Source: Montana Department of Commerce

Figure 48: Projected Housing Unit Demand, Pondera County



Source: Woods & Poole, Montana Department of Commerce

Table 31: Pondera County Projected Unmet Housing Needs

Percent of MFI	Total Renter and Owner				
	Elderly	Small Related	Large Related	Other	Total
<b>2015</b>					
0.0-50.0%	80	120	58	67	324
50.1-80.0%	40	57	35	22	154
80.1-95.0	9	26	4	8	46
Above 95.0%	13	58	53	8	130
<b>2020</b>					
0.0-50.0%	78	119	56	65	318
50.1-80.0%	38	57	34	22	151
80.1-95.0	9	25	3	6	44
Above 95.0%	12	57	51	6	127
<b>2025</b>					
0.0-50.0%	77	116	56	65	314
50.1-80.0%	38	56	33	22	150
80.1-95.0	9	25	3	6	44
Above 95.0%	12	56	50	6	126
<b>2030</b>					
0.0-50.0%	77	116	56	65	314
50.1-80.0%	38	56	33	22	150
80.1-95.0	9	25	3	6	44
Above 95.0%	12	56	50	6	126

Source: Montana Department of Commerce

Note: Rounding errors were noted in the Montana Housing Needs Assessment Report

## Infrastructure

Pondera County is expected to have approximately \$13.1 million in sewer and water impacts resulting from the expected growth, as well as existing improvements to correct deficiencies. The county has relatively similar cost impacts as compared to Cascade County; however, unlike Cascade County, Pondera County's biggest issue is water improvements.

Brady, Dupuyer and Ledger – all unincorporated towns – have projected needs totaling more than \$8.5 million resulting from potential growth impacts. Conrad, the

County's seat, is expected to be able to accommodate future growth within the next five years and has no planned water improvements at this time. However, Brady is planning to connect to Conrad's water system, which can accommodate another 2,000-3,000 connections.

Sewer capacity is a smaller issue for the county with approximately \$4.6 million planned for improvements to accommodate growth. Dupuyer and Valier were the two communities with projected cost increases resulting from both new DEQ standards and growth. Valier's system is being planned for a 20-year expansion.

Conrad's system can accommodate approximately another 1,000-2,000 more connections before requiring upgrades, which will easily accommodate the projected growth through the next five years.

Pondera County only has 10 projects on MDT's STIP program with the majority of improvements taking place on Heart Butte Road and smaller improvements slated for improving roads. Smaller improvements are slated through Brady, Conrad, Dupuyer, and Valier. Most businesses stated that transportation was not an issue for their operations in Pondera County.

Table 32: Pondera County STIP (2014-2018)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2014	HSIP	SF109 - ADV CURVE SIGNG ON P-3	US-89	9.64	SIGNING - NEW	<1
2014	HSIP	SF109 - G. RAIL - HEART BUTTE RD	L-18-100	0.5	SAFETY	<1
2014	HSIP	SF109 - G. RAIL - HEART BUTTE RD	L-18-100	0.5	SAFETY	<1
2014	IM	D-3 FENCING - BRADY NORTH	I-15	70.13	FENCING	<1
2014	IM	D-3 FENCING - BRADY NORTH	I-15	70.13	FENCING	<1
2014	SRTS	SRTS SIDEWALKS - CONRAD			SIDEWALK	<1
2014	IM	BRADY N & S - SB	I-15	11.56	CHIP SEAL	<1
2014	STPP	DUPUYER - NORTH	US-89	8.7	MILL & FILL	<1
2014	STPP	CONRAD MAIN STREET - NORTH	P-21	1.44	CHIP SEAL	<1
2015	STPP	VALIER - EAST	MT-44	14.13	MILL & FILL	<1

Source: MDT

Table 33: Pondera County Sewer Improvements

Pondera County	Sewer System				
Community	Type of System	At Capacity	Expansion Costs	Additional Connections Available	Comments
Conrad	Mechanical	No	N/A	1,000-2,000	Treatment plant was built in 2009 for a projected population of 4,000 residents. Current population is 2,674 residents.
Dupuyer (unincorporated)	Individual Drain Fields	Problems with DEQ	Might need community system (KLJ estimate \$2.5 million)	N/A	Source believes everyone in town utilizes individual drainfields.
Valier	Lagoon	Yes	\$2.1 million	It is expected that the proposed 2014 improvements have been designed for a 20-year planning period.	Has plenty of capacity and available lots to build on but no mains feeding those lots. Valier needs to update zoning and ordinances.
Ledger (unincorporated)	Individual Drain Fields	N/A	N/A	N/A	Conrad and Port Authority believe that they operate off of individual drainfields. No lagoon visible from aerial photo.
Brady (unincorporated)	Lagoon	No	N/A	20 years	Tried contacting Brady County Water three times but no answer. Tried contacting Lauri once but only had work number and she requested that we call at 6:00 pm. Lagoon is visible from the aerial photo. Lagoon was replaced in 2011 with a new system.

Table 34: Pondera County Water Improvements

Pondera County	Water System				
Community	Type of System	At Capacity	Expansion Costs	Additional Connections Available	Comments
Conrad	Lake Francis	No	N/A	2000-3000	Conrad is currently updating its water distribution system. Submitted to funding agencies in 2014 for treatment plant, storage and more distribution improvements. Conrad will eventually be connected to the NCMRWA system.
Dupuyer (unincorporated)	Individual Wells	Problems with DEQ	Might need a community system (KLJ estimate \$3.0 million)	N/A	N/A
Valier	Wells	No	N/A	Significant water improvements were completed in 2011. It is thought that they were designed for a 20-year planning period.	Has plenty of capacity and available lots to build on but no mains feeding those lots. Valier needs to update zoning and ordinances.
Ledger (unincorporated)	Tiber County Water District	Yes	Unknown (approximated at \$500,000)	N/A	At capacity due to undersized pipe. The Tiber County Water District will eventually be connected to the NCMRWA system.
Brady (unincorporated)	Small reservoir on unnamed tributary	Yes	Connected to Conrad's system in the summer 2014 (approximately \$5 million).	Reference Conrad's system.	Connected to Conrad's system in 2014.

Table 35: Pondera County Landfill Status

Glacier County	Landfills	
Community	Name	Status
Conrad	Northern MT Joint Refuse Disposal District, Class II, Conrad, (Choteau Landfill Class III, Cut Bank Roll-Off Site Class III, Conrad Roll-Off Site Class III), Teton County Refuse Disposal District #1, Class III, Dutton & Power	The landfill is not at capacity. They purchased an additional 160 acres and have approximately 140 years of available space.
Dupuyer (unincorporated)		
Valier		
Ledger (unincorporated)		
Brady (unincorporated)		

## Community Services

### LAW ENFORCEMENT

Pondera County reported that the staffing level is adequate for the current workload. The dispatchers are all part-time staff, and jail staff duties are actually handled as a secondary function by the deputies and the dispatchers. The workforce has been very stable and very little turnover has occurred in the past five years.

Jail space is adequate, and although they would like more office space, it is enough to meet their current needs. If growth were to occur, the current facility would need to expand depending upon the number of staff required. More than two additional, full-time staff would require an expansion/remodel of the current facility.

The current ratio of law enforcement staff to population is sufficient. Law enforcement staff believe they would be able to hire additional personnel to retain the current ratio (800 people per 1 law enforcement staff).

### FIRE DEPARTMENTS

#### VALIER FIRE DEPARTMENT

The department has a roster of 22 volunteers with 14 active members. They have had a lot of turnover in recent years, partially because it is difficult to find time to obtain the required training. The department has four fire fighting vehicles and would like to add a brush truck at an estimated cost of \$40,000-\$50,000.

#### CONRAD FIRE DEPARTMENT

The department serves both the City of Conrad and the

rural area around it. It has a stable volunteer staff but several are reaching retirement age and have begun recruiting volunteers. It costs approximately \$3,000 for initial equipment and training for each new volunteer. Only one truck is used for fires in the city and it needs to be replaced. The department noted that if significant growth occurred in the area they would need additional equipment, especially personal protective gear.

### SCHOOLS

Schools in Pondera County are experiencing similar trends as other rural counties in the Sweetgrass Region. Student enrollments are either steady or slowly declining, and administration is planning how to keep qualified teachers without increasing enrollments. Similar to trends across all the counties, quality teachers in math, science and music are the most difficult positions to fill and attract especially for rural districts.

#### VALIER SCHOOL DISTRICT

Valier has a K-12 student population of approximately 175. Student population has been fairly stable.

There is no information available on student-teacher ratios. The school has encountered problems with recruitment, especially for high school positions including science and math. Available and affordable housing is a problem when trying to recruit new, young teachers.

The current facility has availability especially in the high school where the school could accommodate nearly triple the current enrollment level. If growth occurred in the elementary school they would need to add several teachers, but facilities would be able to support the growth.

#### CONRAD SCHOOL DISTRICT

The district has a K-12 student population of approximately 530 children. Student population has been fairly stable; and based on current grade levels and overall community stability, it is likely to remain so.

The student-teacher ratio is approximately 11:1 at the high school level, 8:1 at the middle school level, and 13:1 at the elementary school level. There has been very little

Table 36: Pondera County School Information

School District	Estimated Enrollment (K-12)	Student: Teacher Ratio	Facility Upgrade/ Expansion Costs	Issues
Valier	175	Unavailable	Unavailable Accommodate 300% Growth	Quality Teachers
Conrad	530	11:1 HS 8:1 MS 13:1 ES	Unavailable Accommodate 300 students	Housing for teachers and young families

turnover of teaching staff over the last 10 years but it is difficult to find replacements when vacancies exist.

The district has four facilities. The buildings are not anywhere near capacity and have the potential to add up to 300 more students. Conrad would be able to handle growth before needing to hire more teachers as well. Existing facilities are generally in good condition with only one major investment needed for a new middle school boiler. No cost estimate is available.

One additional comment for the Conrad School District is that there is a need for additional housing. Because housing is not readily available for middle income families such as teachers, the town has little ability to attract new, young families into the community and thus there is little anticipation for growth.

## HOSPITALS, CLINICS AND EMS

The Pondera Medical Center in Conrad serves Pondera County residents. Glacier County is served by the Northern Rockies Medical Center in Cut Bank. They are in similar situations to Marias Medical Center (Toole County), although with a bit less economic growth. All three are critical access hospitals with varying degrees of staff turnover.

Facilities are generally adequate, although the technology may not be quite as current as in larger hospitals and communities. The medical center will have a need for new technology as the useful lifespan on most equipment is approximately seven years.

EMS is provided by the Medical Center and needs

additional volunteers, specifically drivers, to keep service levels adequate. Staffing is tied to the Medical Center and will fluctuate as population rises or declines.

## Strategies

Strategies for Pondera County are similar to other counties included in this study.

### EMPLOYMENT

- » Collaborate with workforce development programs to create skilled-trade training programs for the following:
  - » Diesel mechanics
  - » Precision manufacturing
  - » Welders
  - » Accountants
  - » Nursing and health care staff
  - » Semi-truck drivers
- » Create scholarships for local students/youth to local/regional educational facilities or trade schools coupled with internships at local businesses to encourage youth to stay in the community. The program could be expanded to 2nd and 3rd year students from outside the region to encourage them to stay as well.
- » Provide education debt repayment for both traditional and trade schooling for younger employees willing to stay or relocate to the region.
- » Improve apprentice programs for trades (diesel mechanics, manufacturing, welders, electricians, plumbers and truck drivers) and encourage youth to

move into and advance in these vital fields.

- » Develop a middle and high school career day with focus on the trades. Not every student has the goal of going on to higher education and should find the same level of encouragement to pursue work in the trades.

## HOUSING

- » Begin addressing affordable housing for middle-income persons including teachers, law enforcement and small business owners.
  - » Policies may include inclusionary zoning, incentive based programs such as density bonuses or funding stream revenues from public agencies.
- » Coordinate with NeighborWorks Montana to find appropriate housing policies and affordable housing developers to begin developing a county-by-county plan on where to construct units.
- » Identify units in poor condition and units with unmet needs to create a working database that can be shared across the region; utilize HOME grants and low-interest or revolving loans funds to begin rehabilitating such structures.
- » Implement an education program on the 'rungs of home ownership' would be beneficial in each jurisdiction. Several employers stated that employees want more modern rentals and newer homes. The stark reality is that homes/apartments, which meet these definitions, typically rent/sell for more than what had traditionally been affordable.
- » Implement programs to acquire, renovate and remarket dwellings/rentals that are deemed to be

substandard. Groups like NeighborWorks or the Montana Home Ownership Network may be able to help modernize and then sell or lease units. Lease-to-own programs for renovated housing should be considered.

- » Allow for modular homes, which are not manufactured homes, in zoning codes. Many modular homes are being built to the 2012 International Building Code Council Residential standards. This is a higher standard than required by the State of Montana via the Building Code and therefore modular homes tend to be more energy efficient.
- » Consider via each jurisdiction's Growth Policy and subdivision regulations to create developments that provide a mixture of lot sizes and permitted number of dwellings on a given lot. This is especially effective in areas where water and/or sewer is available to the lot.
- » In more rural areas consideration should be given to having Montana State Subdivision Law revised to allow for the creation of 1/2-acre lots with shared water and on-site septic systems. However, this would require changes to Montana state law and DEQ rules.
- » Business should, if possible, pursue options for telecommuting to improve quality of life and reduce transportation costs.
- » Create workforce housing near schools and business centers to address housing needs; jurisdictions should consider implementing workforce housing programs to offer incentives for affordable housing.

## INFRASTRUCTURE

- » Utilize PERs as a planning tool to prepare for grant requests; submit requests on time for funding cycles.
- » Develop impact fees to offset improvement costs with the money that is being spent, or needs to be spent, to improve or expand capacity. Service providers should consider impact fees or other forms of capital reserves to defray costs of future expansions or replace capacity that is incrementally reduced with development. This is very important given the massive costs associated with improvements to water and waste water treatment systems and the dramatic reductions in grant funding to help pay for these required improvements/expansions.
- » Create and implement a comprehensive Capital Improvements Plan for jurisdictions, including water/sewer districts to help prioritize projects and establish user rates and potential increases.
- » Determine if user rates are in line with rates expected by Montana DEQ. End user rates for water/sewer are very important in obtaining grant.
- » Local governing bodies should analyze the status of local roads and streets and develop options to fund long-term maintenance. Quality local roads encourage quality development.
- » CDBG via the State of Montana Department of Commerce funds several Planning Grants on an annual basis. The Planning Grants are typically first come first serve.
- » CDBG also provides competitive construction grants that are administered at the state level. While the grants require a low to moderate income benefit

there are ways to bring these funds into the most affluent communities

## LOCAL SERVICES

- » Develop a nursing job shadow program with the ability to train registered nurses in the area with an emphasis on serving critical access hospitals.
- » Implement law enforcement and fire district capital improvements including funds for personal protection equipment into the County's CIP to help offset costs.
- » Develop an incentive program for volunteer fire firefighters such as pay per response.
- » Collaborate with fire departments across the region including all five counties to explore joint/inter-local agreements to supplement a declining volunteer force.
- » Create a grant funding database for specific services to apply for and utilize Sweetgrass Development as the primary grant coordinator.
- » Explore the option of utilizing Payment in Lieu of Taxes (PILT) from the Federal Government to fund large capital improvements by setting aside these funds rather than using them to balance budgets.
- » Fire departments and EMS should pursue FEMA Grants and other Public Safety Grants available from the State of Montana (MDT and DOJ) to upgrade their radios and other communication equipment to solve communication problems.



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## Overview

Teton County is the second largest economy in terms of future employment and wage growth within the Sweetgrass five-county region. Choteau, the County seat, is expected to remain the economic center for the county; however, all businesses identified did note that they provide services to Great Falls and the Sweetgrass Region as a whole; and were partially dependent upon some “spillover” effects from the Great Falls metro area. As noted earlier, jobs were assigned to each county based on where the headquarters or primary business office was located for each company interviewed and does not necessarily reflect the actual distribution of job growth throughout the region. However, assigning job numbers was crucial to estimate impacts and to determine if employment and population forecasts were in line with separate data entities such as Woods & Poole and eREMI.

## Impact Summary

Teton County is expected to have the second highest number of new jobs created as noted in interviews as well as from forecasts supplied by Woods & Poole. Trends indicate a growing workforce and a continuing population growth in the next five years. Population growth ranges from adding between 55 to 74 new residents through 2020 and more than 85 new

The estimated employment growth for the County through 2020 includes:

- 253 permanent jobs
- 23 temporary jobs
- 276 total jobs

jobs as estimated from Woods & Poole data.

The County is has the potential to add more than 276 new jobs in the next five years; 253 are classified as permanent jobs and 23 are classified as temporary (employed less than 6 months during a year).

Similar to other rural counties, employers noted difficulty in attracting employees with qualified skills, especially welders, diesel mechanics and truck drivers with CDL endorsements. However, because several businesses were in close proximity to Great Falls, business owners did note that they do not have as difficult time filling positions as some other rural counties that are not as close to Great Falls. The County is projected to have the second highest rate of wage increase behind Cascade County and is projected to remain well above the state average wage growth.

Affordable housing was a growing concern as more businesses stated that current and future employees are and will likely have difficulty finding affordable units (30 percent of gross income spent on housing). Companies did not identify quality housing as an issue for employees; rather, more than 80 percent of businesses interviewed noted that single-family homes between \$130,000-\$180,000 were becoming increasingly difficult to find throughout the county. At least four businesses directly stated that Great Falls may influence prices in both Fairfield and Choteau as people may live in these towns but work in Great Falls because the standard of living was less expensive, thus removing otherwise available homes from the market.

Infrastructure improvements totaled \$9.2 million with the vast majority, \$8.9 million, slated for sewer improvements for Choteau and Fairfield. Water improvements resulting from impacts were a small proportion of total improvements with approximately \$300,000 identified for Power (an unincorporated town). Teton County has 13 projects on MDT’s STIP program with the majority of improvements identified as costing less than \$1 million and located primarily near Dutton and Bynum.

Law enforcement, fire departments, schools and hospitals all are able to support growth, if it should occur and do not need major expansions should growth happen. Fairfield and Choteau school districts could accommodate a 100 percent increase in student enrollment before needing substantial improvements. Hospital staff estimated having difficulty keeping current service levels if growth occurs in the next five years and would need additional MDs and RNs.

## Population

Similar to Cascade and Pondera Counties, which are expected to have steady growth through 2030, Teton County is expected to add between 55 to 74 new residents through 2020. Woods & Poole, which uses a historic growth rate, projects a conservative growth rate of approximately 55 people through year 2020 and nearly 180 people through 2030. However, the Montana CEIC, which utilizes more localized data, forecasts the County will add 74 people through 2020 and more than 100 by 2030. Unlike Glacier and Toole County, which

# TETON COUNTY

are expected to peak in population in 2025, Teton County is expected to continue to grow through 2030. Each population growth scenario, Woods & Poole and MT CEIC, estimate nearly identical populations by 2030 suggesting that the county will experience approximately a three percent total growth rate by 2030.

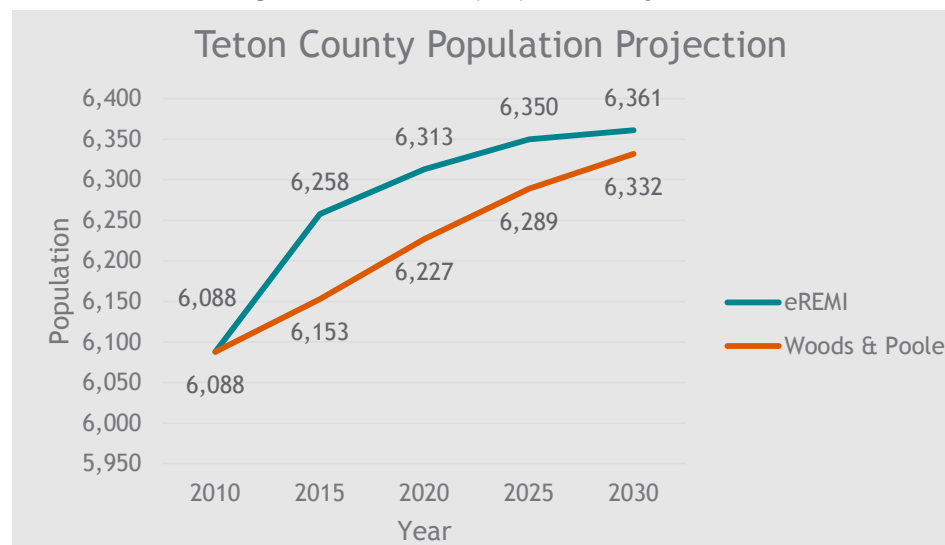
Information obtained from business interviews and community stakeholders suggested that most sectors, including private businesses, schools, police and sheriff, and hospitals expect growth to continue. As noted in the graphs, Choteau, Dutton and Fairfield are the only incorporated municipalities and account for approximately 45 percent of the total county population. Trends from the past two decades show a population decline in Choteau, Dutton and the county, whereas Fairfield actually added population with a seven percent increase during the past decade. Since future forecasts show growth, it is difficult to assess where growth may actually occur due to recent population declines experienced by all communities, except Fairfield. Therefore, if the same population allotments were used from the 2010 US Census, Choteau and Fairfield would be expected to receive the majority of new growth followed by growth in the rural areas of the county and lastly Dutton.

Table 37: Teton County Population Change (%)

Population Change				
City	1990-2000		2000-2010	
Choteau	40	2.30%	-97	-5.45%
Dutton	-3	-0.77%	-73	-18.77%
Fairfield	-1	-0.15%	49	7.44%
Rest of County	138	3.97%	-251	-6.94%
Teton County Total	174	2.77%	-372	-5.77%

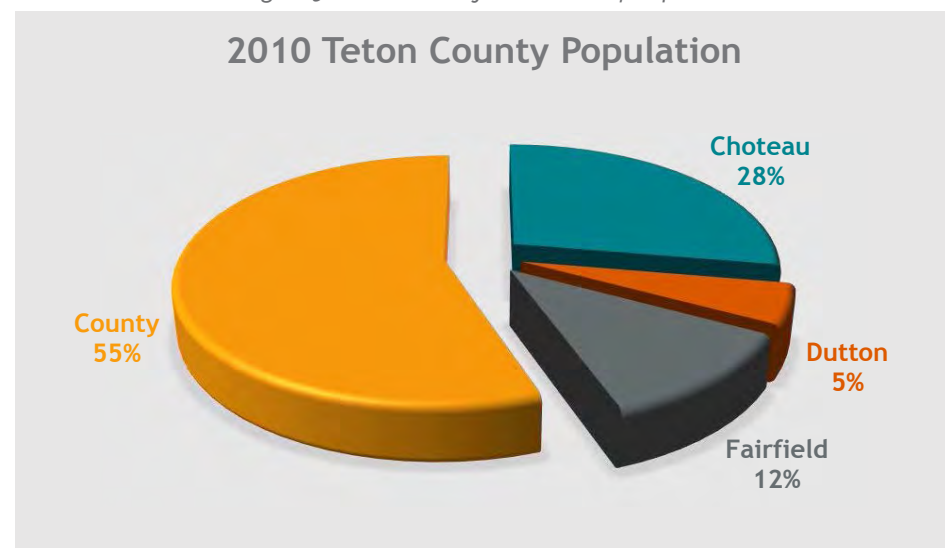
Source: US Census

Figure 49: Teton County Population Projections



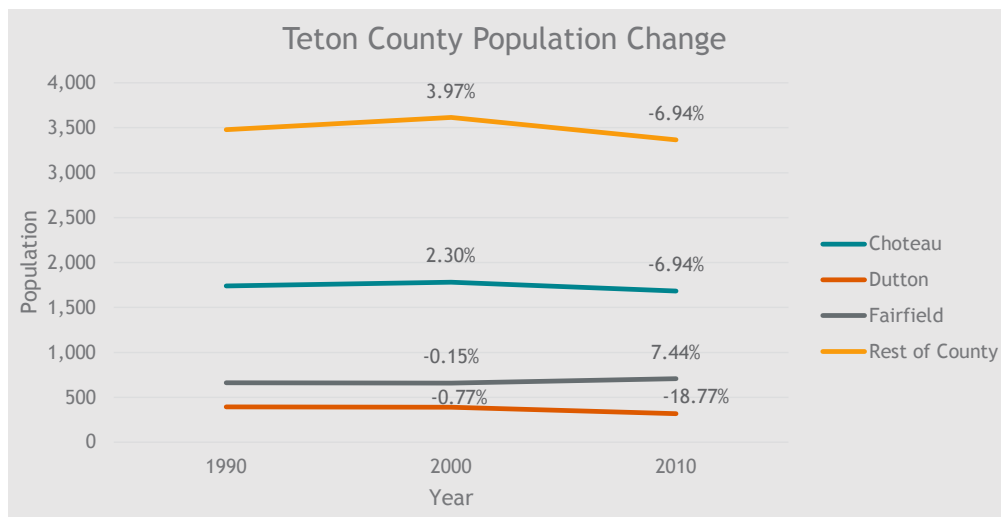
Source: Woods & Poole, Montana Department of Commerce

Figure 50: Allocation of Teton County Population



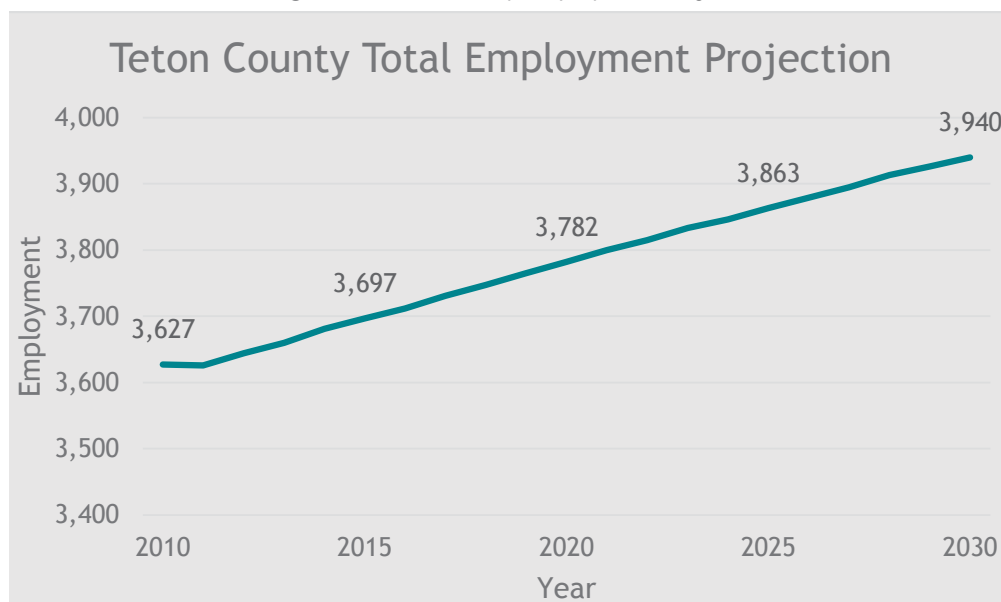
Source: US Census

Figure 51: Teton County Population Change



Source: US Census

Figure 52: Teton County Employment Projections



Source: Woods & Poole

## Employment

Teton County is expected to add 85 jobs through 2020 as identified by Woods & Poole employment projections. Through interviews with businesses, KLJ identified 276 jobs – 253 permanent and 23 temporary (employed less than six months during the year) – would be added throughout the county. It is estimated that the 85 jobs as forecasted by Woods & Poole may be an underrepresentation of growth in the county as the county is forecasted to only add 243 jobs through year 2030. As such, the private employment growth may be optimistic, given that one business estimated adding more than 200 new jobs through the year 2020.

Teton County is projected to be the third fastest growing economy in terms of new jobs added in north-central Montana. Data provided by Woods & Poole, indicates a stable hiring trend for the next five years. The county is also expected to add the third most numbers of jobs as identified through company interviews. Businesses are looking to add people, especially young professionals and middle-aged employees, as the baby-boomer generation begins retiring from the workforce. This was one of the greatest concerns for businesses moving forward in that the next five years and will likely bring about substantial employment shifts in terms of working age professionals and backfilling roles with qualified personnel.

Approximately 65 percent of businesses interviewed stated finding qualified applicants was essential to growing a business. A majority of companies stated that hiring individuals with trade skills – such as machinists,

truck drivers and mechanics – would be needed, but that potential employees with business skills including accounting, marketing and writing were as in high demand as trade skills.

While businesses in the county did not necessarily state their ideal employee type, only two noted that they would be willing to train individuals; those two businesses were looking for trade skills only. Because Teton County is close to Great Falls, several companies stated that they had an easier time attracting employees because of the larger employment pool of candidates, but retention was a growing concern.

The working age of young professionals (25-34) and working professionals (35-44) has either remained steady or dropped during the past decade, suggesting that young people and young families are not gaining employment in the county and are therefore not relocating to the area. Executive professionals (45-54) and senior professionals (55-64) have both risen through the past decade, indicating concerns businesses expressed during interviews: that young professionals with skill sets are difficult to attract while more experienced workers tend to stay in jobs longer and are delaying retirement. This trend makes it more difficult for businesses to backfill jobs and attract new employees. Additionally, eight businesses interviewed in Teton County expressed plans to expand operations in the county or central Montana, and more than 50 businesses interviewed in central Montana expressed plans to hire staff through the next five years.

Earnings potential and personal incomes for workers within Teton County are expected to steadily increase through 2030, indicating that workers will continue to receive high wages for work performed. The county is above the statewide average for personal income growth and is the second highest county in terms of both personal income and median household income growth. Personal incomes within the county are expected to be approximately \$5,000 more than the statewide average and only several thousand less than the US average.

Similar to Pondera and Glacier Counties, most businesses stated that they would increase wages to keep employees

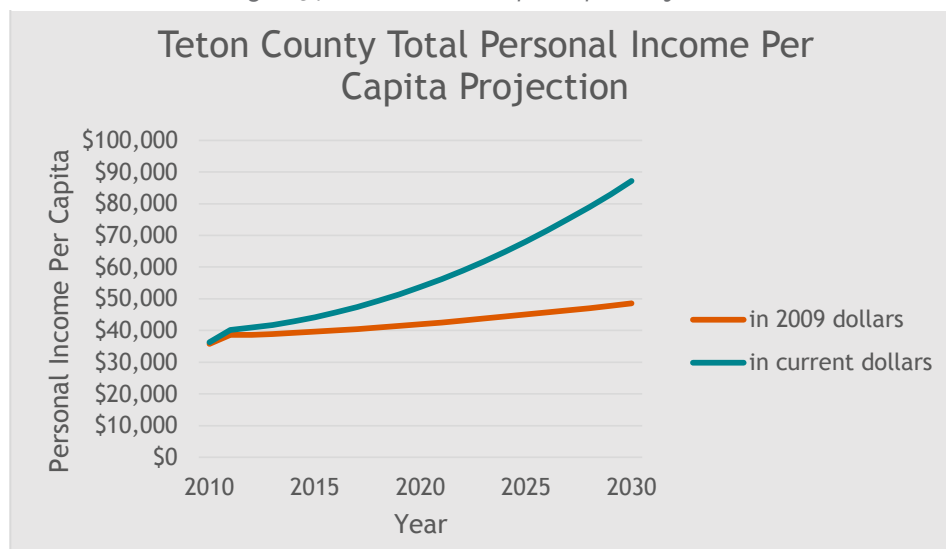
interested in work and to reduce the likelihood they would leave a job. Only one business mentioned they would also include a hiring bonus if the right candidate was hired. Nearly 50 percent of all businesses stated that Teton County's quality of life was a better incentive than paying higher wages because employees could have the opportunity to work in Great Falls. There is no data to support this claim.

Figure 53: Teton County Age Breakdown (1990, 2000, 2010)



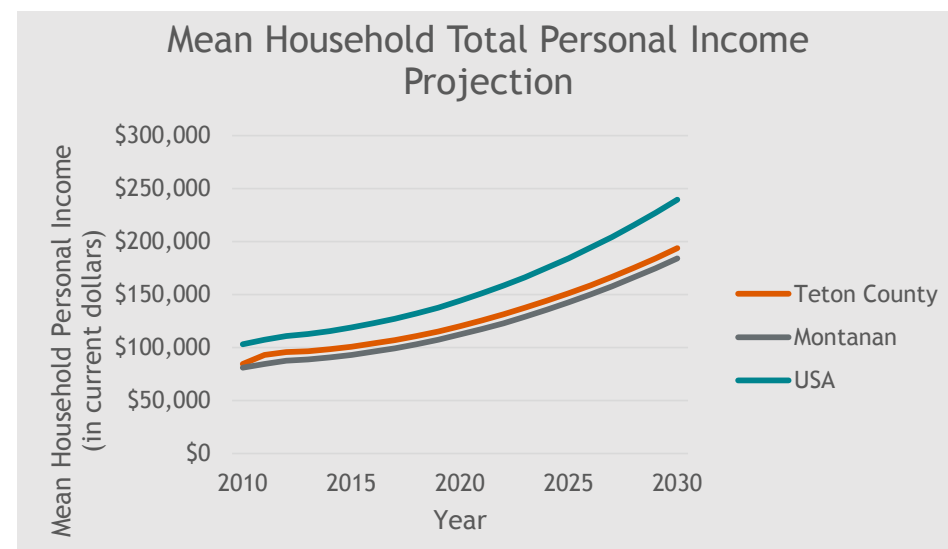
Source: Woods & Poole

Figure 54: Personal Income per Capita Projections



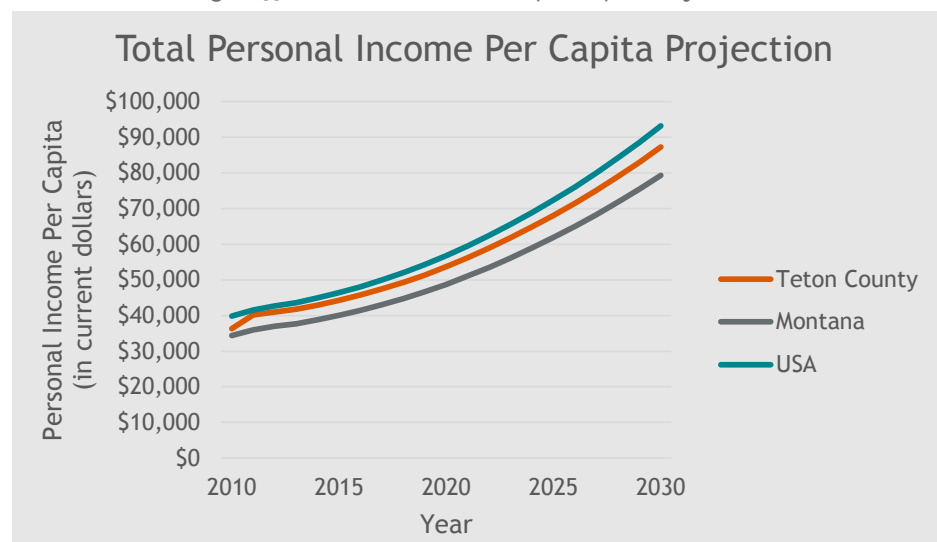
Source: Woods & Poole

Figure 56: Household Total Personal Income Projections



Source: Woods & Poole

Figure 55: Total Personal Income per Capita Projections



Source: Woods & Poole

## Housing

Similar to all counties in the Sweetgrass Region, housing was the greatest impediment to future growth for businesses in Teton County. Approximately 70 percent of businesses interviewed stated that housing was an issue for current and future employees. Affordability was the largest housing issue raised in interviews followed by quality homes – updated amenities and newer construction (post 2000) – and updated rental units for temporary employees. In fact, Teton County and Toole County were the only two counties where employers noted that having quality rental units were as important, if not more important, to retaining a quality workforce rather than single-family homes – partially because affordable single-family units are difficult to purchase.

Multiple sources of information were used to determine housing needs for Teton County including existing studies from the Montana Department of Commerce as well as KLJ's analysis of State of Montana information were used to determine potential new units to address growth and to account for units in poor condition.

As evidenced in the following tables and figures, Teton County's housing is affordable for most professions; the only professions where single-family, homeownership affordability becomes an issue is for retail salesperson, disabled workers and retired seniors on social security income. The median home price for Teton County (\$105,000) is approximately \$10,000 to \$25,000 more as compared to the three other rural counties, but is nearly \$50,000 less than Cascade County's median home

price. All identified employment groups are estimated to be able to afford a manufactured home in the county. Disabled workers and seniors on fixed income are the only two groups not able to afford rental prices in Teton County; all other employment groups were able to afford both one and two-bedroom rental units in 2010.

Overall, housing prices have remained relatively stable in Teton County and, unlike all other counties, housing prices actually decreased from 2008 to 2010. Realtors

were able to confirm declining prices, although home sales prices have risen in the past year to more than \$110,000 for an "average" home. Single-family home prices decreased one percent from 2008 to 2010. Rental prices have remained stable and increased nearly six percent during the same period. While realtors could not provide accurate rental prices for 2013, they did note that rental prices have remained near \$475 for a one-bedroom unit and \$625 for a two-bedroom rental unit.

Table 38: Teton County Housing Affordability

Affordable Share of Income for Housing Various Occupations						
Select Occupations	2008			2010		
	Annual Income	Affordable Home Cost	Affordable Monthly Rent	Annual Income	Affordable Home Cost	Affordable Monthly Rent
2006-2010 Median Household Income	Not available			\$39,516	\$165,810	\$988
Average all Occupations	\$32,437	\$109,107	\$811	\$32,745	\$137,399	\$819
Registered Nurse	\$50,379	\$169,458	\$1,259	\$52,363	\$219,716	\$1,309
Police Officer	\$43,538	\$146,447	\$1,088	\$35,676	\$149,697	\$892
Elementary School Teacher	\$39,528	\$132,959	\$988	\$36,321	\$152,404	\$908
Retail Salesperson	\$24,777	\$83,341	\$619	\$23,152	\$97,146	\$579
Disabled Worker, SSI	\$12,600	\$42,382	\$315	\$11,908	\$49,965	\$298
Senior on fixed-income, SSI	\$12,691	\$42,689	\$317	\$12,764	\$53,556	\$319
Police Officer and Retail Salesperson	\$68,315	\$229,788	\$1,708	\$58,828	\$246,844	\$1,471
Two incomes: Two Teachers	\$79,056	\$265,918	\$1,976	\$72,642	\$304,807	\$1,816

Source: Montana Department of Commerce

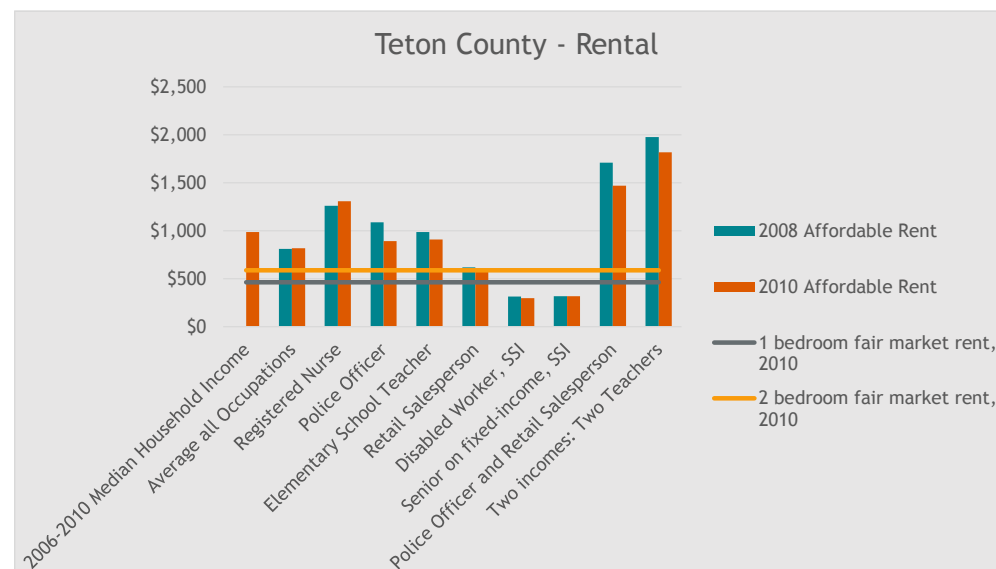


Table 39: Teton County Change in Affordability

	2008	2010	% Change
Single Family Median Home Cost	\$106,500	\$105,000	-1.4%
Condos & Townhomes Median Appraised Value	\$0	\$0	0.0%
Manufactured Home Median Appraised Value	\$23,255	\$23,580	1.4%
1 Bedroom Fair Market Rent	\$439	\$464	5.7%
2 Bedroom Fair Market Rent	\$557	\$588	5.6%

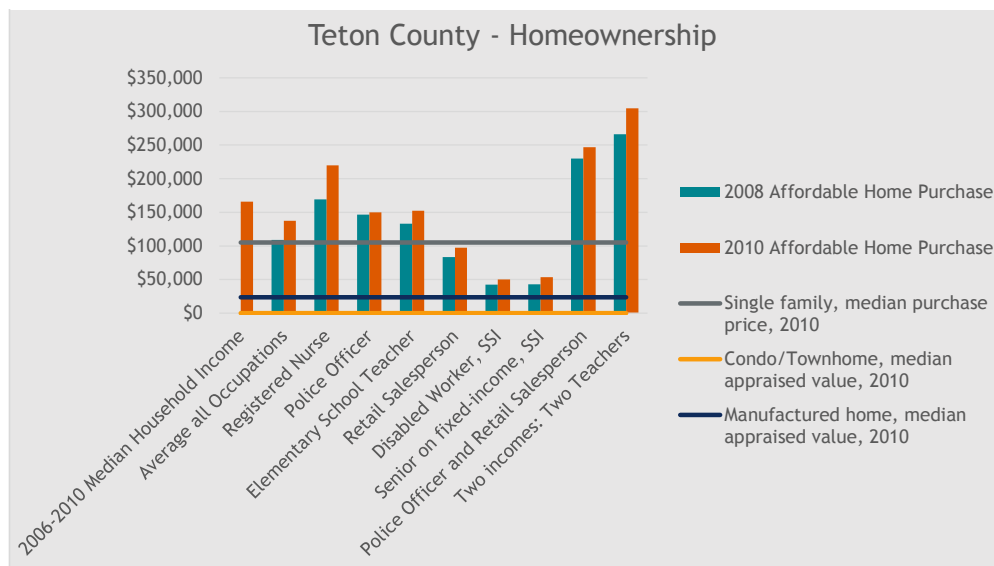
Source: Montana Department of Commerce

Figure 58: Affordable Rental Rate Trends



Source: Montana Department of Commerce

Figure 57: Affordable Homeownership Trends



Source: Montana Department of Commerce

Table 40: Population and Structure Size, Teton County

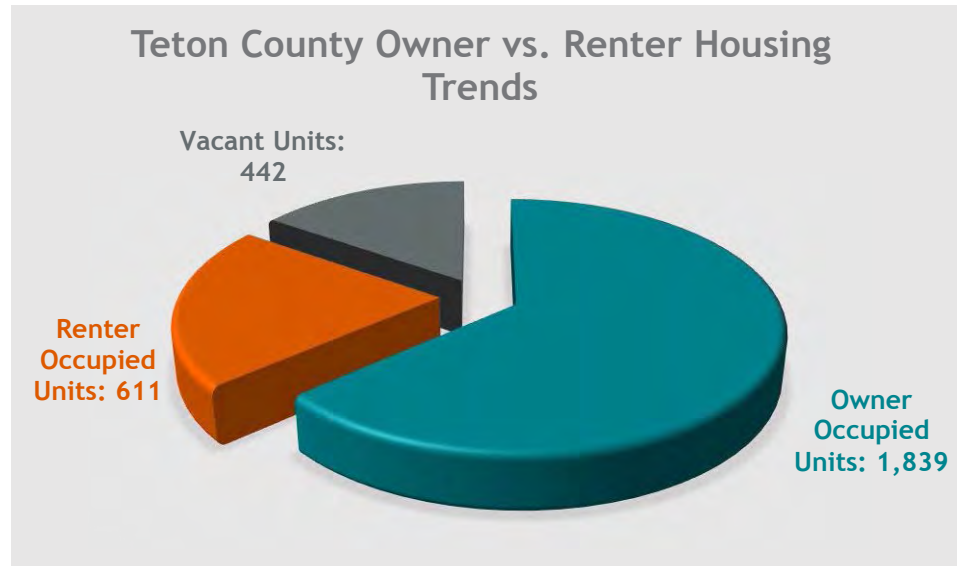
Teton County Population and Structure Data, 2010 Census			
	2000	2010	% Change
Homeownership Rates:	75.7%	75.1%	-.6%
Population:	6,445	6,073	-5.8%
Owner Occupied Units:	1,914	1,839	-3.9%
Renter Occupied Units:	624	611	-2.1%
Total Households:	2,538	2,450	-3.5%
Vacant Units:	372	442	18.8%

Source: Montana Department of Commerce

When asked about worker characteristics to determine general housing needs, employers stated a 50/50 mix for rental and ownership housing units. They also expressly stated that having more duplex or townhome units would be helpful to make homeownership affordable for some of their employees that could not otherwise afford a traditional single-family home. As noted from other interviews across the region, temporary workers would prefer to rent quality units with updated features that were constructed post 2000. Some companies stated that rental housing with nice features is actually preferred for several workers who know they will only be hired on a temporary basis and because businesses are experiencing a “higher than normal” turnover in workforce.

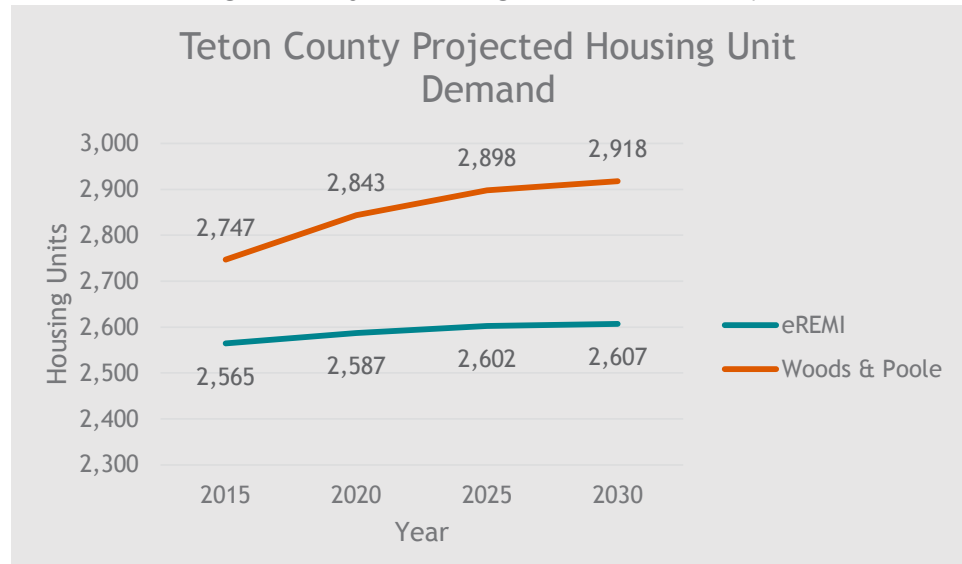
KLJ concluded that Teton County may have difficulty meeting housing demand based on projected employment of more than 276 new jobs in the county through the next five years. Businesses were unable to confidently state where expansion plans would occur or where new employees would be hired and would live; therefore it is extremely difficult to project how many employees will live in the county in which they work or whether they will find housing elsewhere. KLJ estimated the number of new housing units needed based on population forecasts and the average household size. The two projections used were Woods & Poole data, which includes an estimated household size projection and the US Census. Since the Census does not include such numbers, KLJ used the 2010 Census household size for MT CEIC projections.

Figure 59: Owner versus Renter Housing Trends



Source: Montana Department of Commerce

Figure 60: Projected Housing Demand, Teton County



Source: Woods & Poole, Montana Department of Commerce

Based on MT CEIC models and Woods & Poole data, Teton County will need to add approximately 22 to 87 new housing units in the next five years to meet demand. If all 276 projected new employees were to relocate within Teton County, the county would have a shortfall of 90 to 150 housing units. Moreover, when units in poor condition – units that need substantial improvements to make the structures livable – are included in the overall estimate, then housing becomes a substantial investment for all communities within Teton County.

Information provided by the Department of Commerce indicated Teton County had more than 13 percent of its housing in poor condition in 2010. When factoring in unmet housing needs, Teton County will need to improve an additional 624 rental and owner-occupied units or approximately 22 to 24 percent of total units to meet unmet housing needs by 2020. When housing demand from population and employment growth and unmet housing needs are combined, the county is projected to need 645 to 710 housing units to meet demand and correct unmet housing needs. An additional 90 to

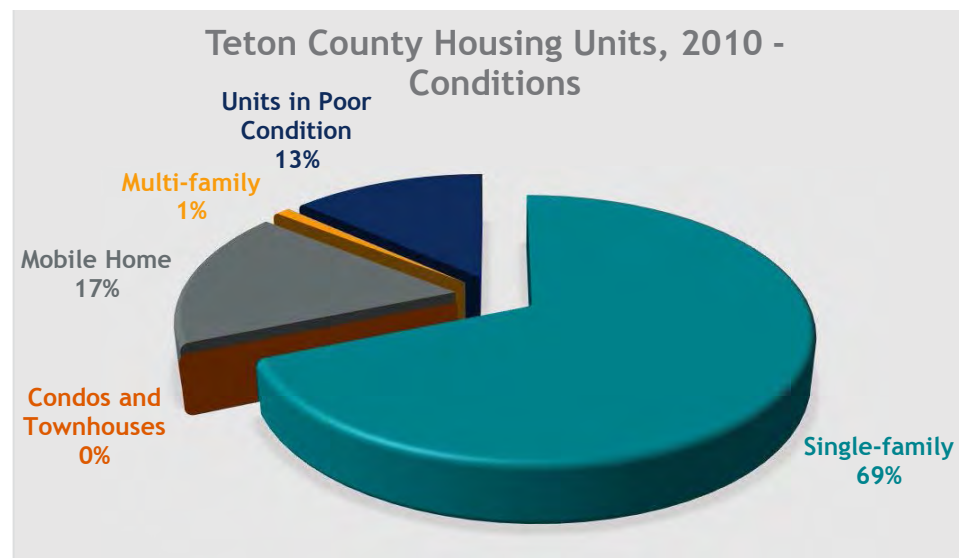
150 units may also be needed to correct for projected employment growth through 2020, thus raising the total number of housing units needed to 735 to 860.

Table 41: Housing Unit Conditions, Teton County

	Total Housing Units	Units in Poor Condition, 2010	% of Total	Units in Acceptable Condition, 2010	% of Total
Total housing units	3,175	422	13.3%	2,753	86.7%
Single-family	2,457	275	8.7%	2,182	68.7%
Condos and Townhouses	0	0	0.0%	0	0.0%
Mobile Home	580	40	1.3%	540	17.0%
Multi-family	138	107	3.4%	31	1.0%

Source: Montana Department of Commerce

Figure 61: Housing Unit Conditions



Source: Montana Department of Commerce

Table 42: Housing Units by Structure Size, Teton County

Housing Unit Type	
1 Unit Detached	1,867
1 Unit Attached	47
2 Units	11
3-4 Units	24
5-9 Units	101
10-19 Units	12
20 or more Units	31
Mobile Homes	296
Boat, RV, van, etc.	0
<b>Total</b>	<b>2,389</b>

Source: US Census Bureau

Table 43: Teton County Projected Unmet Housing Needs

Percent of MFI	Total Renter and Owner				
	Elderly	Small Related	Large Related	Other	Total
<b>2015</b>					
0.0-50.0%	95	90	59	60	316
50.1-80.0%	36	69	27	27	160
80.1-95.0	4	14	8	9	34
Above 95.0%	36	59	9	14	118
<b>2020</b>					
0.0-50.0%	95	100	58	60	314
50.1-80.0%	36	69	27	27	159
80.1-95.0	4	14	8	9	34
Above 95.0%	36	59	9	14	117
<b>2025</b>					
0.0-50.0%	95	101	59	60	314
50.1-80.0%	36	69	27	27	159
80.1-95.0	4	14	8	9	34
Above 95.0%	36	59	9	14	117
<b>2030</b>					
0.0-50.0%	81	115	59	50	306
50.1-80.0%	38	56	33	22	150
80.1-95.0	4	14	8	9	34
Above 95.0%	36	59	9	14	118

Source: Montana Department of Commerce

Note: Rounding errors were noted in the Montana Housing Needs Assessment Report

## Infrastructure

Teton County is expected to have approximately \$9.2 million in sewer and water impacts resulting from the expected growth as well as existing improvements to correct deficiencies. Unlike the other Sweetgrass counties of Glacier and Pondera, the vast majority of improvements needed are for sewer upgrades.

Choteau and Fairfield have significant upgrades planned to accommodate future growth with Choteau accounting for nearly \$7 million in improvements and Fairfield with \$1.9 million. Choteau's system has infiltration issues and is working on upgrading to a mechanical plant, while Fairfield is waiting on funds to upgrade their existing system.

Power, an unincorporated community, had the only planned water improvement with a projected cost of \$300,000 to replace a water filter. Choteau had capacity to add an additional 200-300 new connections, but if all employment and population growth were to locate only in Choteau the city would require improvements within five years.

Teton County has 13 projects on MDT's STIP program with the majority of improvements identified as costing less than \$1 million and located near Dutton and Bynum. Two

projects are estimated to be more than \$5 million and include upgrades to State Highway 379 and US Highway 89 near Dutton and Bynum respectively.

Landfills were not an issue as Teton County also utilizes the Northern Montana Joint Refuse Disposal District, which has approximately 140 more years of useful life expectancy.

Table 44: Teton County STIP (2014-2018)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2014	STPS	DUTTON - EAST	S-379	14.14	REHAB - MAJOR	<1
2014	STPP	NORTH OF BYNUM - NORTH	US-89	4.27	RECONSTRUCTION	<1
2014	HSIP	SF 119-JCT US 89/S-431	US-89	0.4	ADV FLASHER, LUMINAIR	<1
2014	HSIP	SF 119-JCT US 89/S-431	US-89	0.4	ADV FLASHER, LUMINAIRES	<1
2014	HSIP	SF 129 - CURVE SIGN CHOTEAU	S-221	0.5	SAFETY	<1
2014	IM	POWER - N & S	I-15	8.3	CHIP SEAL	<1
2015	STPS	DUTTON - EAST	S-379	14.14	REHAB - MAJOR	<1
2015	STPP	NORTH OF BYNUM - NORTH	US-89	4.27	RECONSTRUCTION	<1
2015	STPP	BYNUM - SOUTH	US-89	5.68	RECONSTRUCTION	<1
2015	STPE	SIDEWALKS - CHOTEAU	US-287	0.18	SIDEWALK	<1
2016	STPS	DUTTON - EAST	S-379	14.14	REHAB - MAJOR	>5
2017	STPP	NORTH OF BYNUM - NORTH	US-89	4.27	RECONSTRUCTION	>5

Source: MDT

Table 45: Teton County Sewer Improvements

Teton County		Sewer System			
Community	Type of System	At Capacity	Expansion Costs	Additional Connections Available	Comments
Choteau	Lagoon	Yes	\$7 million	N/A	System experiences infiltration resulting in insufficient detention times (especially in the spring). 1 cell lagoon. Working on design of mechanical plant.
Collins (unincorporated)	Individual Drainfields	N/A	N/A	N/A	Less than 10 homes in the area, very small.
Power (unincorporated)	Lagoon	No	N/A	Very large and not at capacity	One of the two cells was divided into three cells in 1985. Only one cell is typically used but is overflowing into other cells, could use some work. They would like to divide other cell into three cells like previously done.
Fairfield	Lagoon	Close	\$1.9 million	N/A	Submitted to funding agencies in 2014 for treatment plant improvements.
Dutton	Lagoon	No	N/A	20 years	WWTP, lift station, various collection improvements were recently completed, 20-year design life.

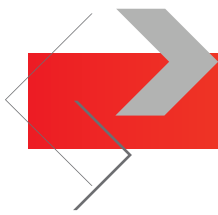
Table 46: Teton County Water Improvements

Teton County	Water System				
Community	Type of System	At Capacity	Expansion Costs	Additional Connections Available	Comments
Choteau	Wells	No	N/A	200-300	No planned improvements, but they need additional water mains extended to service lots with wells.
Collins (unincorporated)	Shared well at river	No	N/A	N/A	The residents haul water to individual cisterns from a well located 3/4 of a mile to the south near the river.
Power (unincorporated)	Muddy Creek	Yes	Unknown. Need an additional filter at treatment plant to accommodate any expansion (approximated at \$300,000).	N/A	There is minimal to no new lots available for new home construction. The current treatment system can provide 50 gpm but is at max. They also need tank maintenance.
Fairfield	Wells	No	N/A	N/A	Has recently completed various improvements including updated mains, completely metered, telemetry.
Dutton	Wells	No	N/A	Significant room for growth	Never gone dry and very seldom requires water restrictions. Dutton will eventually be connected to the NCMRWA system.

Table 47: Teton County Landfill Status

Glacier County	Landfills	
Community	Name	Status
Choteau	Northern MT Joint Refuse Disposal District, Class II, Conrad, (Choteau Landfill Class III, Cut Bank Roll-Off Site Class III, Conrad Roll-Off Site Class III), Teton County Refuse Disposal District #1, Class III, Dutton & Power	The landfill is not at capacity, they just purchased an additional 160 acres and have approximately 140 years of available space.
Collins (unincorporated)		
Power (unincorporated)		
Fairfield		
Dutton		





## Community Services

### LAW ENFORCEMENT

Teton County reported that the staffing level is sufficient for their current workload. The County pays an annual range between \$20,000-40,000 in overtime to cover increased workload. However, this is still less than the cost of an additional patrol officer.

Staff turnover is nearly non-existent. The Sheriff's department has three full-time and three part-time dispatch staff, but no detention staff because Teton County contracts with Pondera County and sometimes with Chouteau County for jail space. Current office space is adequate, and will meet future needs unless substantial impacts occur. The ratio of 600 people to 1 law enforcement officer is sufficient, although the County would like to see the number drop to below 500/1.

Two additional issues were specifically noted by Teton County:

- 1) The benefit of having an additional officer as a School Resource Officer would improve coverage and help with community issues relating to school safety.
- 2) The threat of loss of federal funds in the form of Payments in Lieu of Taxes is a real concern. Teton County has large tracts of federal land that help supplement staffing incomes.

### FIRE DEPARTMENTS

#### CHOTEAU FIRE DEPARTMENT

The department has the largest volunteer staff of four fire departments in Teton County with approximately 15 active volunteers and an additional 8 semi-active members. Aging volunteers are forcing the department to begin recruiting more members, but efforts have been extremely difficult. The department typically only receives six or seven members attending an incident because many of the volunteers work out of the area. They have four vehicles for fighting fires, and would like to add a quick response vehicle at an estimated cost of \$80,000-\$100,000. The department also needs to obtain updated wildland gear and bunker gear as they are witnessing new development with rural subdivision plats. The fire chief raised concerns about the lack of proper site development in some rural homes because they are not being developed with defensible areas against wild fires.

### SCHOOLS

Schools in Teton County are experiencing similar trends as other rural counties in the Sweetgrass Region. Student enrollments are either steady or slowly declining with the exception of Fairfield, which actually had a student increase the past two years. However, similar to trends across all the counties, quality teachers in math, science and music are the most difficult positions to fill and attract especially for rural districts.

#### BRADY DUTTON SCHOOL DISTRICT

The district has a K-12 student population of approximately 160 children with approximately 100 students at the K-12 building and another 60 at Hutterite Colony education centers. The district has experienced a slight decrease in student population in recent years and an increase in transient students.

Student-teacher ratio is unavailable. There is very little

Table 48: Teton County School Information

School District	Estimated Enrollment (K-12)	Student: Teacher Ratio	Facility Upgrade/ Expansion Costs	Issues
Brady	160	Unavailable	Unavailable 50% capacity	Shortage of teachers
Fairfield	287	15:1	Unavailable	Recruiting math/music
Power	105	8:1	\$1.5 million	Facility upgrades (gym)
Bynum Elem	26	9:1	Unavailable	Improving technology and aging roof

turnover of teachers, but recruitment can be difficult because of the teacher shortage in Montana.

The current building housing K-12 is at 50 percent of capacity and the facility is in good condition. Doubling the enrollment would improve 7-12 education with greater diversity of classes because they could hire more teachers.

### FAIRFIELD SCHOOL DISTRICT

Fairfield has a K-12 student population of approximately 297. Enrollment has been dropping over the years, and the trend is likely to continue for at least several more years. Fairfield serves as the high school for two K-8 school districts as well.

The student-teacher ratio is 15:1, which is satisfactory. The school has little turnover of teachers because of the high quality of life in the community. Certain high school teachers such as math, music, science, and consumer science, as well as Special Education teachers are extremely difficult to attract.

The current K-12 building could likely accommodate an additional 100 students. It would take a major event like an oil boom before there would be capacity problems. If there were substantial growth in the community the school would need to add classroom space, teachers and equipment. Major maintenance issues exist with the school building. The gymnasium roof and the shop roof need to be replaced, but the cost is beyond their capacity to fund the improvements. Additional improvements include upgraded technology capacity and replacing the gymnasium floor. No cost estimates were available for

the projects. The school was recently able to upgrade their kitchen with a significant grant which only had a small match requirement.

### POWER SCHOOL DISTRICT

The district has a student enrollment of approximately 105. It has been dropping over the last six years and will likely drop again next year before it stabilizes.

The student-teacher ratio is approximately 8:1 and is the preferred ratio. The school has little problem attracting or retaining teachers. In part, this is due to the easy commute to Great Falls where some of their current teachers reside.

The current combined K-12 building could likely accommodate 250 students without needing additional space. Any substantial increase in enrollment would require more teachers with an additional high school teacher first followed by more elementary teachers because elementary staff would split combined classes. The current facility is in need of a new gymnasium even without any increase in student population. The estimated cost for a new gymnasium is approximately \$1.5 million.

### BYNUM ELEMENTARY SCHOOL DISTRICT

The elementary school has a K-8 student population of approximately 26. Seven students attend the Miller Hutterite education center, and 19 attend the Bynum Elementary school. Enrollment levels have varied greatly over the decades. Since the 1990s, attendance has been declining although it has been fairly stable in the last

several years. Currently 15 of the students are brought to the site from outside the school district because of strong academic and arts programs. Most students attend high school in Choteau.

The student teacher ratio is approximately 9:1. There has been very little turnover in teaching staff.

The school building was constructed in 1914, and is still a sound building. It has sufficient capacity to accommodate many more students. If there was a substantial increase in attendance they would need to add teacher(s). They would also need new textbooks, desks and improved technology such as better computers. Another significant need is to replace the aging school roof, but there are no cost estimates available.

### HOSPITALS, CLINICS AND EMS

Teton County is served by Teton Medical Center in Choteau. This medical facility is very stable and has adequate facilities to meet the needs of the service area. It is the least likely to be impacted by economic development as staffing has a low turnover rate. The medical center is preparing cost estimates and staffing forecasts, which are not available at this time. EMS was contacted three times but did not provide a response for the study.

## Strategies

Strategies for Teton County are similar to other counties included in this study.

### EMPLOYMENT

- » Collaborate with workforce development programs to create skilled-trade training programs for the following:
  - » Diesel mechanics
  - » Precision manufacturing
  - » Welders
  - » Accountants
  - » Nursing and health care staff
  - » Semi-truck drivers
- » Create scholarships for local students/youth to local/regional educational facilities or trade schools coupled with internships at local businesses to encourage youth to stay in the community. The program could be expanded to 2nd and 3rd year students from outside the region to encourage them to stay as well.
- » Provide education debt repayment for both traditional and trade schooling for younger employees willing to stay or relocate to the region.
- » Improve apprentice programs for trades (diesel mechanics, manufacturing, welders, electricians, plumbers and truck drivers) and encourage youth to move into and advance in these vital fields.
- » Develop a middle and high school career day with focus on the trades. Not every student has the goal of going on to higher education and should find the

same level of encouragement to pursue work in the trades.

### HOUSING

- » Begin addressing affordable housing for middle-income persons including teachers, law enforcement and small business owners.
  - » Policies may include inclusionary zoning, incentive based programs such as density bonuses or funding stream revenues from public agencies.
- » Coordinate with NeighborWorks Montana to find appropriate housing policies and affordable housing developers to begin developing a county-by-county plan on where to construct units.
- » Identify units in poor condition and units with unmet needs to create a working database that can be shared across the region; utilize HOME grants and low-interest or revolving loans funds to begin rehabilitating such structures.
- » Implement an education program on the 'rungs of home ownership' would be beneficial in each jurisdiction. Several employers stated that employees want more modern rentals and newer homes. The stark reality is that homes/apartments, which meet these definitions, typically rent/sell for more than what had traditionally been affordable.
- » Implement programs to acquire, renovate and remarket dwellings/rentals that are deemed to be substandard. Groups like NeighborWorks or the Montana Home Ownership Network may be able to help modernize and then sell or lease units. Lease-to-own programs for renovated housing should be considered.

- » Allow for modular homes, which are not manufactured homes, in zoning codes. Many modular homes are being built to the 2012 International Building Code Council Residential standards. This is a higher standard than required by the State of Montana via the Building Code and therefore modular homes tend to be more energy efficient.
- » Consider via each jurisdiction's Growth Policy and subdivision regulations to create developments that provide a mixture of lot sizes and permitted number of dwellings on a given lot. This is especially effective in areas where water and/or sewer is available to the lot.
- » In more rural areas consideration should be given to having Montana State Subdivision Law revised to allow for the creation of ½-acre lots with shared water and on-site septic systems. However, this would require changes to Montana state law and DEQ rules.
- » Business should, if possible, pursue options for telecommuting to improve quality of life and reduce transportation costs.
- » Create workforce housing near schools and business centers to address housing needs; jurisdictions should consider implementing workforce housing programs to offer incentives for affordable housing.

### INFRASTRUCTURE

- » Utilize PERs as a planning tool to prepare for grant requests; submit requests on time for funding cycles.
- » Develop impact fees to offset improvement costs with the money that is being spent, or needs to be spent, to improve or expand capacity. Service providers

should consider impact fees or other forms of capital reserves to defray costs of future expansions or replace capacity that is incrementally reduced with development. This is very important given the massive costs associated with improvements to water and waste water treatment systems and the dramatic reductions in grant funding to help pay for these required improvements/expansions.

- » Create and implement a comprehensive Capital Improvements Plan for jurisdictions, including water/sewer districts to help prioritize projects and establish user rates and potential increases.
- » Determine if user rates are in line with rates expected by Montana DEQ. End user rates for water/sewer are very important in obtaining grant.
- » Local governing bodies should analyze the status of local roads and streets and develop options to fund long-term maintenance. Quality local roads encourage quality development.
- » CDBG via the State of Montana Department of Commerce funds several Planning Grants on an annual basis. The Planning Grants are typically first come first serve.
- » CDBG also provides competitive construction grants that are administered at the state level. While the grants require a low to moderate income benefit there are ways to bring these funds into the most affluent communities

## LOCAL SERVICES

- » Develop a nursing job shadow program with the ability to train registered nurses in the area with an emphasis on serving critical access hospitals.
- » Implement law enforcement and fire district capital improvements including funds for personal protection equipment into the County's CIP to help offset costs.
- » Develop an incentive program for volunteer fire firefighters such as pay per response.
- » Collaborate with fire departments across the region including all five counties to explore joint/inter-local agreements to supplement a declining volunteer force.
- » Create a grant funding database for specific services to apply for and utilize Sweetgrass Development as the primary grant coordinator.
- » Explore the option of utilizing Payment in Lieu of Taxes (PILT) from the Federal Government to fund large capital improvements by setting aside these funds rather than using them to balance budgets.
- » Fire departments and EMS should pursue FEMA Grants and other Public Safety Grants available from the State of Montana (MDT and DOJ) to upgrade their radios and other communication equipment to solve communication problems.

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## Overview

Toole County is the third largest economy in terms of future employment (286 new jobs through 2020) and wage growth within the Sweetgrass five-county region. Shelby, the County seat, is expected to remain the economic center for the county as the vast majority of companies interviewed stated Shelby was their primary business center, but that some business would occur in the county and throughout the Sweetgrass Region. As previously noted, jobs were assigned to each county based on where the headquarters or primary business office was located for each company interviewed and does not necessarily reflect the actual distribution of job growth throughout the region. However, assigning job numbers was crucial to estimate impacts and to determine if employment and population forecasts were in line with separate data entities such as Woods & Poole and eREMI.

## Impact Summary

Toole County is expected to have the second highest number of new jobs created as noted in interviews, yet has the third highest employment, from forecasts supplied by Woods & Poole. Trends indicate a stable, growing workforce and a continuing population growth in the next five years, with the majority of growth expected to occur in Shelby.

The estimated employment growth for the County through 2020 includes:

- 258 permanent jobs
- 28 temporary jobs
- 286 total jobs

Population growth ranges from adding between 79 to 115 new residents through 2020 and more than 82 new jobs as estimated from Woods & Poole data.

The county has the potential to add more than 286 (new jobs in the next five years; 258 are classified as permanent jobs and 28 are classified as temporary (employed less than six months during a year).

Similar to other rural counties, employers noted difficulty in attracting employees with qualified skills, especially with the vast majority of needs focusing on truck drivers with CDL endorsements and mechanics. The county is projected to have the third highest rate of wage increase behind Cascade and Teton County, and is projected to remain well above the state average wage growth through 2030.

Affordable housing was the primary concern as more than 90 percent of businesses stated that current and future employees have difficulty finding affordable units (30 percent of gross income spent on housing) that were constructed after year 2000. Single-family homes between \$130,000-\$180,000 were becoming increasingly difficult to find in Shelby, but smaller communities such as Sunburst and Kevin had units within this price range. Only one company stated housing was not an issue because their employees can work and live anywhere across the nation.

Infrastructure improvements totaled \$4.35 million with the vast majority, \$4.1 million, slated for sewer improvements for Shelby. Dunkirk has a minor water upgrade (\$100,000) so the community can connect

to Shelby's water system, and Sunburst needs approximately \$150,000 to upgrade wells in order to accommodate future growth. Toole County has 9 projects on MDT's STIP program with the majority of improvements identified as costing less than \$1 million and located primarily near the Interstate 15 interchange in Shelby.

Law enforcement, fire departments, schools and hospitals all are able to support growth if it should occur as most facilities do not need major expansions.

## Population

Unlike Cascade, Pondera and Teton Counties, which are expected to have steady growth through 2030, according to the Montana CEIC, Toole County is expected to peak in population in year 2025 and then decrease slightly through 2030. The county is expected to add between 79 to 115 new residents through 2020. Woods & Poole, which uses a historic growth rate, projects a conservative growth rate of approximately 79 people through year 2020 and nearly 200 people through 2030. Montana's CEIC, which utilizes more localized data, forecasts the county will add 74 people through 2020 and more than 150 by year 2025 and then tapering down to 110 people by year 2030. Using each population growth scenario, Woods & Poole and MT CEIC, population estimates vary by 200 total people in year 2030 suggesting that growth will occur, but it depends upon local factors and business expansion.

Information obtained from business interviews and community stakeholders suggest that all sectors

# TOOLE COUNTY

including private businesses, schools, police and sheriff, and hospitals expect growth to continue. No business or community service provider expected declining population, especially in and near the Shelby area.

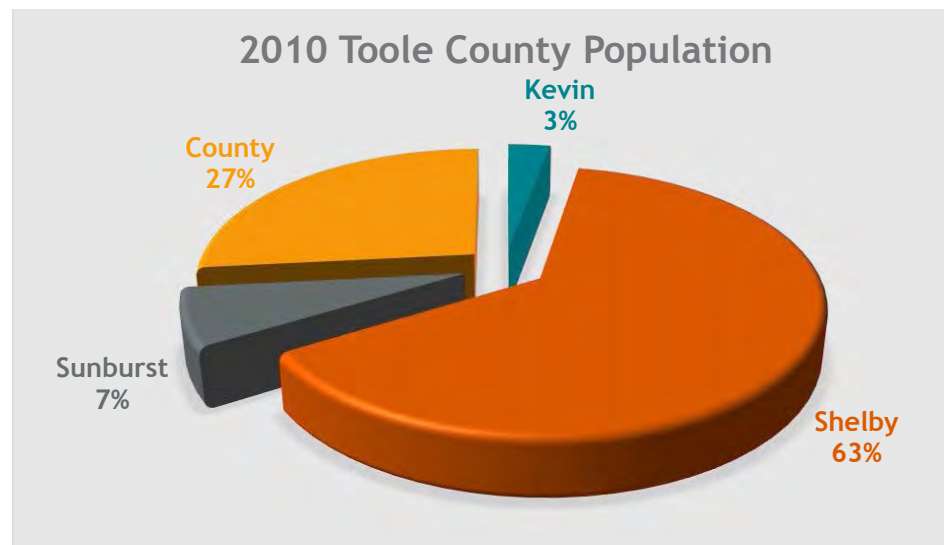
As noted in the graphs, Kevin, Shelby and Sunburst are the incorporated communities and account for more than 70 percent of the total county population, which is unlike any other county in the Sweetgrass Region. Trends from the past two decades show a population decline in all communities, including the county with the exception of Shelby, which had a growth rate of nearly five percent during the previous decade. Since future forecasts show growth, it is difficult to assess where growth may actually occur due to the recent population declines experienced by all communities except Shelby. As noted in recent trends, Shelby can expect to receive the majority of new growth as the city alone accounted for more than 63 percent of the county's total population.

Table 49: Toole County Population Change (%)

Population Change				
City	1990-2000		2000-2010	
Kevin	-7	-3.78%	-24	-13.48%
Shelby	453	16.40%	160	4.98%
Sunburst	-22	-5.03%	-40	-9.64%
Rest of County	-203	-12.22%	-39	-2.67%
Toole County Total	221	4.38%	57	1.08%

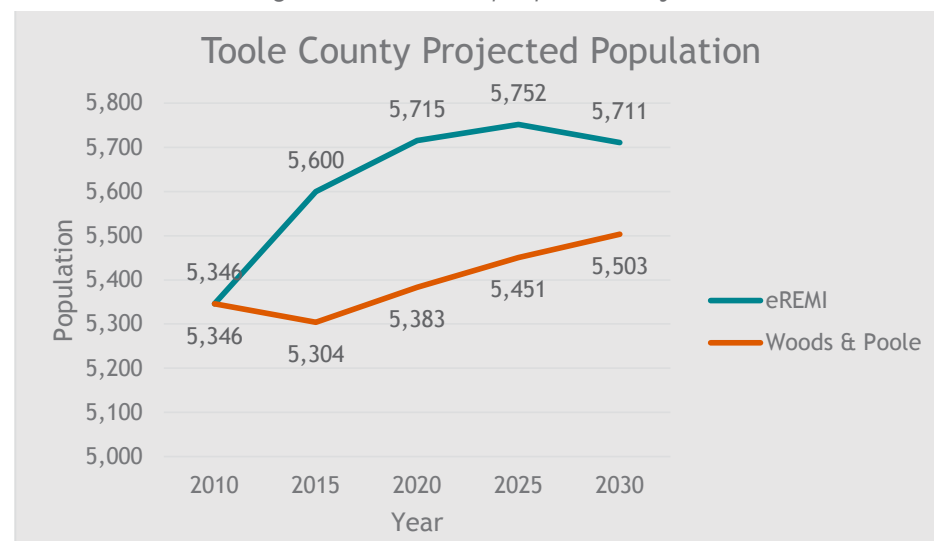
Source: US Census

Figure 63: Allocation of Toole County Population



Source: US Census

Figure 62: Toole County Population Projections



Source: Woods & Poole, Montana Department of Commerce



## Employment

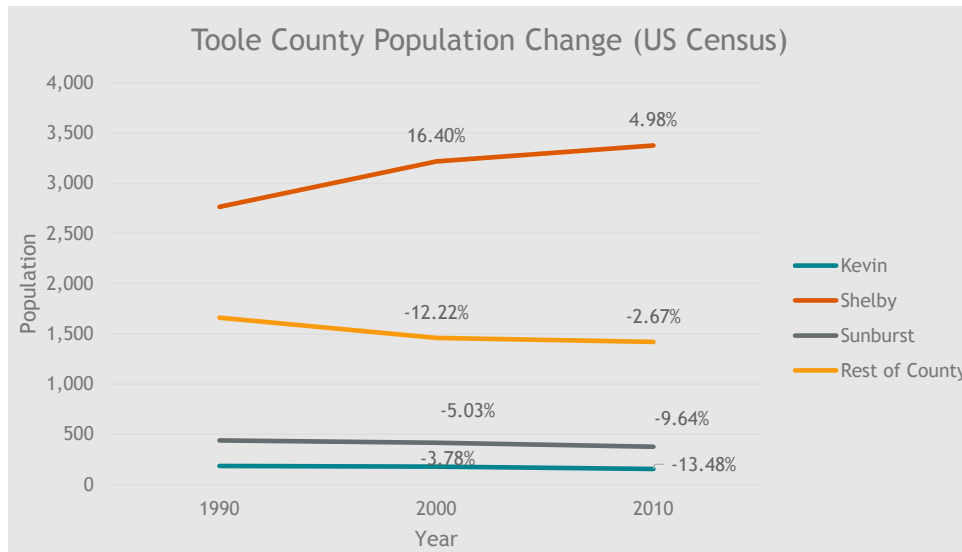
Toole County is expected to add 82 jobs through 2020 as identified by Woods & Poole employment projections. Through interviews with businesses, KLJ identified 284 jobs – 258 permanent and 28 temporary (employed less than six months during the year) – would be added throughout the County. It is estimated that the 82 jobs as forecasted by Woods & Poole may be an underrepresentation of growth in the county as the county is forecasted to only add 251 jobs through year 2030. As such, the private employment growth may be optimistic, especially given that the cumulative employment numbers of interviews is forecasted to be more than 280.

The county is projected to be the fourth fastest growing economy in terms of new jobs added in north-central Montana. Data provided by Woods & Poole indicates a stable hiring trend through the year 2020. However, when factoring in private employment numbers, Toole County is expected to be the second fastest growing economy in terms of jobs added as identified through company interviews. As noted in interviews across the region, businesses are looking to add people, especially young professionals and middle-aged employees, as the baby-boomer generation begins retiring from the workforce. This was one of the greatest concerns for businesses moving forward in the next five years and will likely bring about substantial employment shifts in terms of working age professionals and backfilling roles with qualified personnel.

Approximately 80 percent of businesses interviewed stated finding qualified applicants was essential to growing a business. A majority of companies stated that hiring individuals with trade skills – such as machinists, truck drivers and mechanics – would be needed, but that potential employees with business skills including accounting and science skills such as engineering and geological degrees were as in high demand as trade skills.

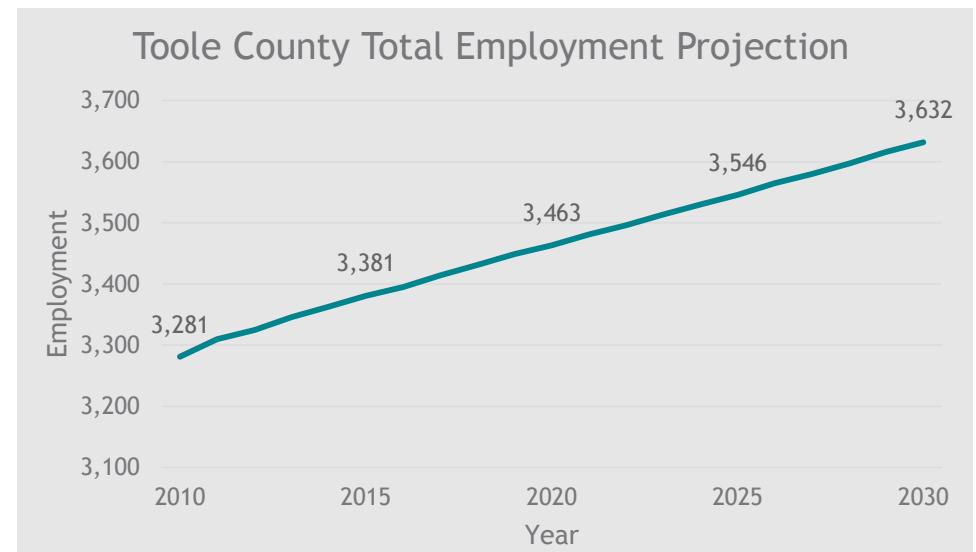
Businesses in the county did not state their ideal employee type, only one business noted that they would be willing to train individuals for specific trade skills. Since Toole County is a major hub for BNSF Railway Company, several companies servicing train-type activities (mechanics and distributors/truck drivers) stated that they had an easier time attracting employees

Figure 64: Toole County Population Change



Source: US Census

Figure 65: Toole County Total Employment Projections



Source: Woods & Poole

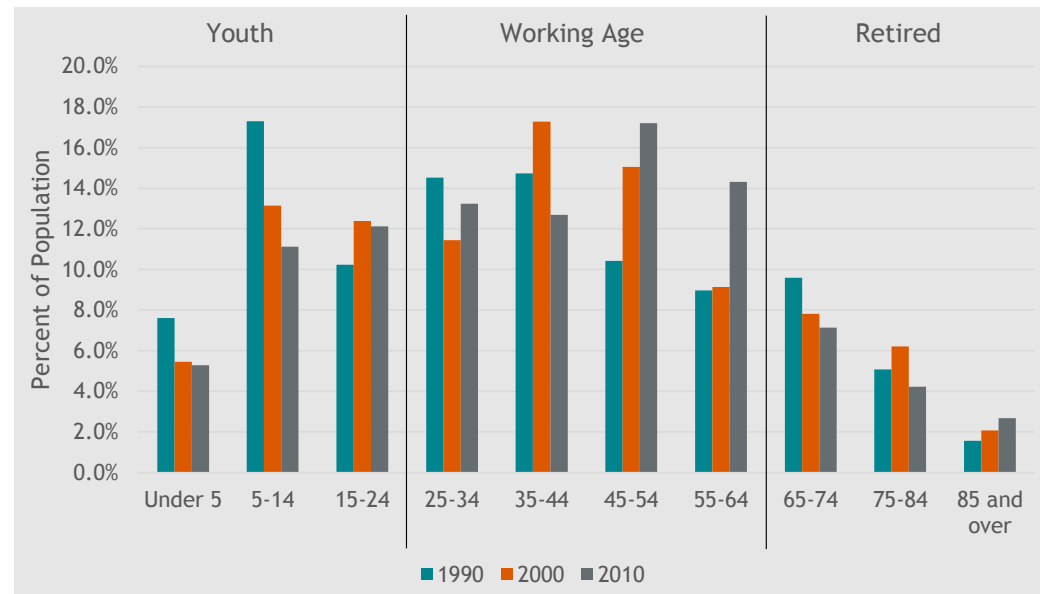
because of BNSF's location in Shelby.

The working age of young professionals (25-34) has rebounded from the last decade, yet working professionals (35-44) has dropped significantly from the last decade. Executive professionals (45-54) and senior professionals (55-64) have both risen through the past decade indicating concerns businesses expressed during interviews: that young professionals with skill sets are difficult to attract while more experienced workers tend to stay in jobs longer, thus making it difficult to fill jobs as people reach retirement. Five businesses interviewed in Toole County expressed plans to expand operations in the county or central Montana, and more than 46 businesses interviewed in central Montana expressed plans to hire staff through the next five years.

Earnings potential and personal incomes for workers within Toole County are expected to steadily increase through 2030, indicating that workers will continue to receive high wages for work performed. The county is above the statewide average for personal income growth and is the third highest county in terms of both personal income and median household income growth. Personal incomes within the county are expected to be approximately \$2,000 more than the statewide average.

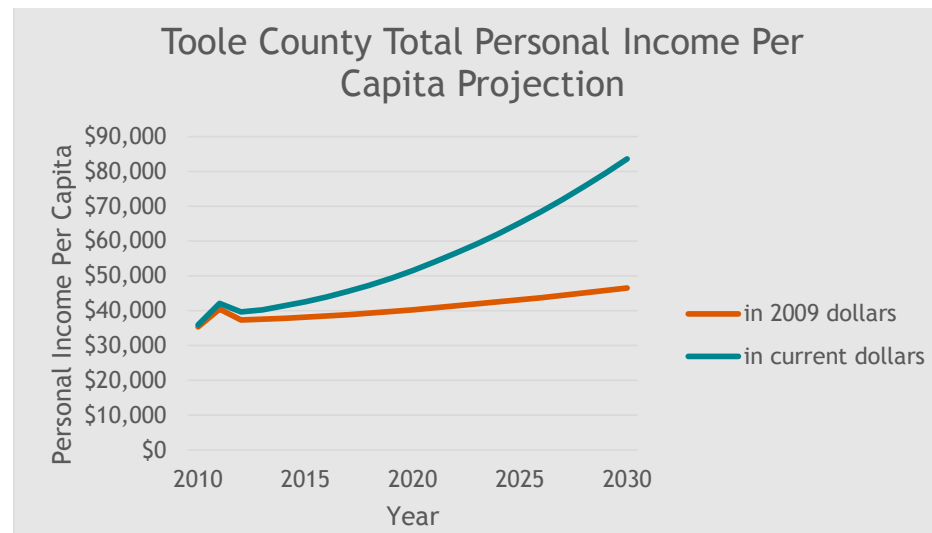
Similar to Pondera and Glacier Counties, most businesses stated that they would increase wages to keep employees interested in work and to reduce the likelihood they would leave a job. Several businesses mentioned they would consider including a hiring bonus if the right candidate was hired, but none expressly committed to it.

Figure 66: Toole County Age Breakdown (1990, 2000, 2010)



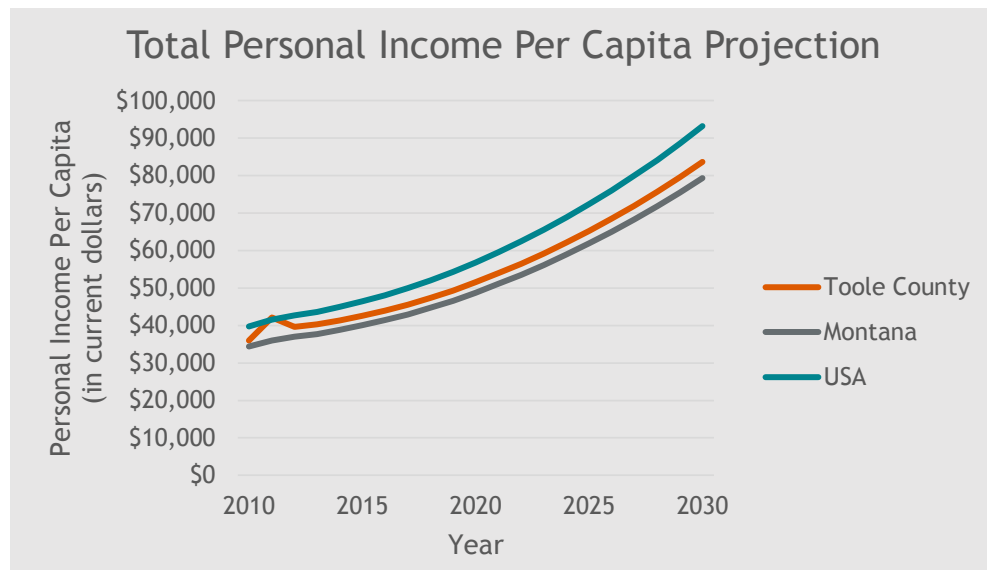
Source: Woods & Poole

Figure 67: Total Personal Income per Capita Comparison



Source: Woods & Poole

Figure 68: Personal Income per Capita Projections



Source: Woods &amp; Poole

## Housing

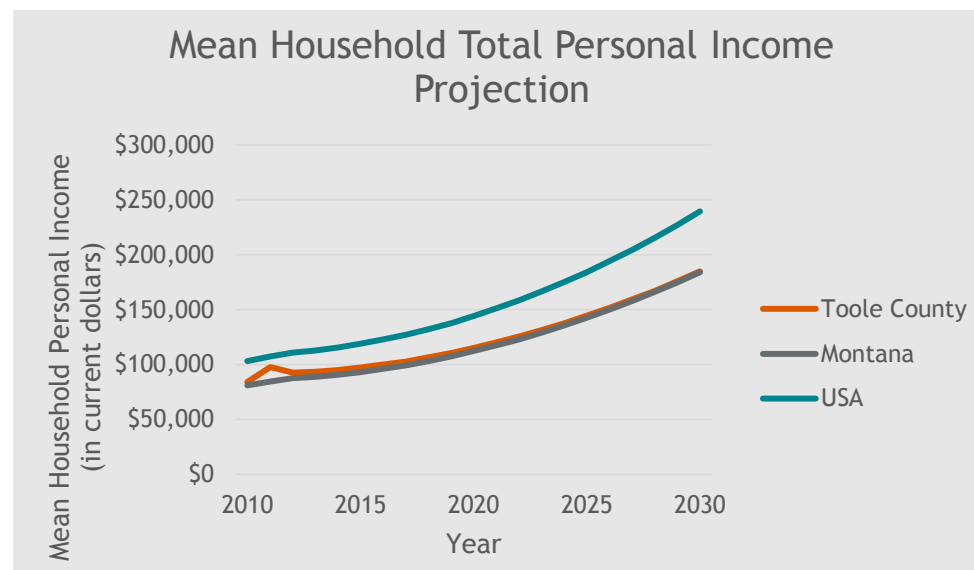
Similar to all counties in the Sweetgrass Region, housing was the greatest impediment to future growth for businesses in Toole County, especially in Shelby. Approximately 75 percent of businesses interviewed stated that housing was an issue for current and future employees in urbanized areas, more than rural areas. Affordability and quality of homes were the largest housing issue raised in interviews. Employees are routinely requesting updated amenities and newer construction (post 2000) for single family homes and updated rental units with more than one-bedroom. In fact, Toole County and Teton County were the only two counties where employers noted that having quality

rental units were as important, if not more important, than single-family homes for retaining quality employees – partially because affordable single-family units are difficult to purchase.

Multiple sources of information were used to determine housing needs for Toole County, including existing studies from the Montana Department of Commerce and KLJ's analysis of State of Montana information to determine potential new units to address growth and to account for units in poor condition.

As evidenced in the following tables and figures, Toole County's housing is affordable for most professions; the only professions where single-family, homeownership affordability becomes an issue is for retail salespersons,

Figure 69: Household Total Personal Income Projections



Source: Woods &amp; Poole

disabled workers and retired seniors on social security income. However, the median home price for Toole County (\$92,000) is approximately \$10,000 to \$20,000 more as compared to two other rural counties, but is nearly \$60,000 less than Cascade County's median home price and more than \$10,000 less than Teton County. All identified employment groups are estimated to be able to afford a manufactured home in the county. Disabled workers and seniors on fixed income are the only two groups not able to afford rental prices in the county; all other employment groups were able to afford both one and two-bedroom rental units in 2010.

Unlike the other counties, housing prices have soared in the past years. The median single-family home price rose more than 45 percent from 2008 to 2010, and

was approximately \$110,000 in 2013 according to local realtors. Rental prices increased nearly six percent from 2008 to 2010. Realtors also noted that rental vacancies have declined in the last two years while prices have risen similar to what was noted in the Montana Department of Commerce Report. While realtors could not provide accurate rental prices for 2013, they did note that rental prices were more than \$550 for a one-bedroom unit and near \$700 for a two-bedroom rental unit.

Table 51: Toole County Change in Affordability

	2008	2010	% Change
Single Family Median Home Cost	\$63,250	\$92,000	45.5%
Condos & Townhomes Median Appraised Value	\$0	\$0	0.0%
Manufactured Home Median Appraised Value	\$20,205	\$21,920	8.5%
1 Bedroom Fair Market Rent	\$439	\$464	5.7%
2 Bedroom Fair Market Rent	\$557	\$588	5.6%

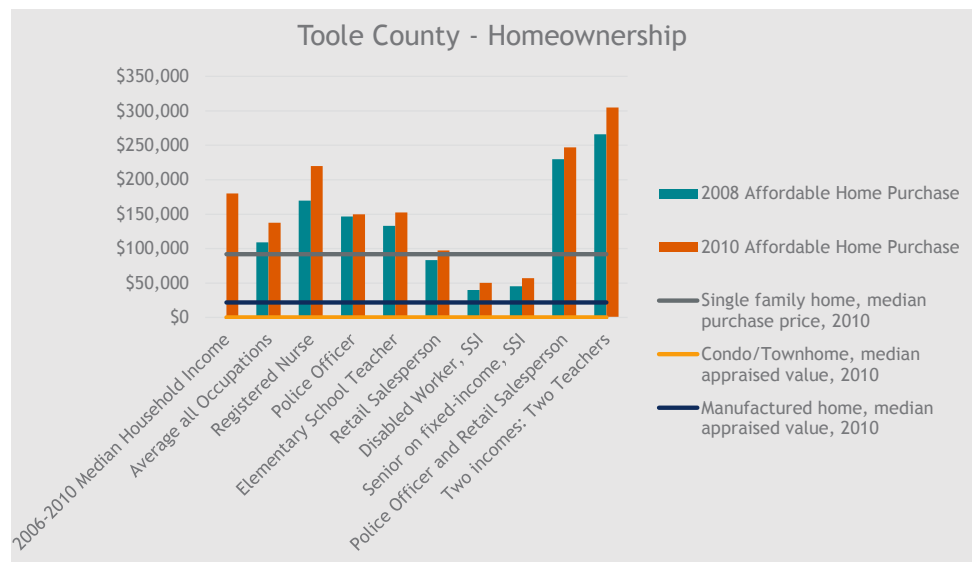
Source: Montana Department of Commerce

Table 50: Toole County Housing Affordability

Affordable Share of Income for Housing Various Occupations						
Select Occupations	2008			2010		
	Annual Income	Affordable Home Cost	Affordable Monthly Rent	Annual Income	Affordable Home Cost	Affordable Monthly Rent
2006-2010 Median Household Income	Not available			\$42,949	\$180,215	\$1,074
Average all Occupations	\$32,437	\$109,107	\$811	\$32,745	\$137,399	\$819
Registered Nurse	\$50,379	\$169,458	\$1,259	\$52,363	\$219,716	\$1,309
Police Officer	\$43,538	\$146,447	\$1,088	\$35,676	\$149,697	\$892
Elementary School Teacher	\$39,528	\$132,959	\$988	\$36,321	\$152,404	\$908
Retail Salesperson	\$24,777	\$83,341	\$619	\$23,152	\$97,146	\$579
Disabled Worker, SSI	\$11,886	\$39,980	\$297	\$12,000	\$50,352	\$300
Senior on fixed-income, SSI	\$13,541	\$45,548	\$339	\$13,579	\$56,978	\$339
Police Officer and Retail Salesperson	\$68,315	\$229,788	\$1,708	\$58,828	\$246,844	\$1,471
Two incomes: Two Teachers	\$79,056	\$265,918	\$1,976	\$72,642	\$304,807	\$1,816

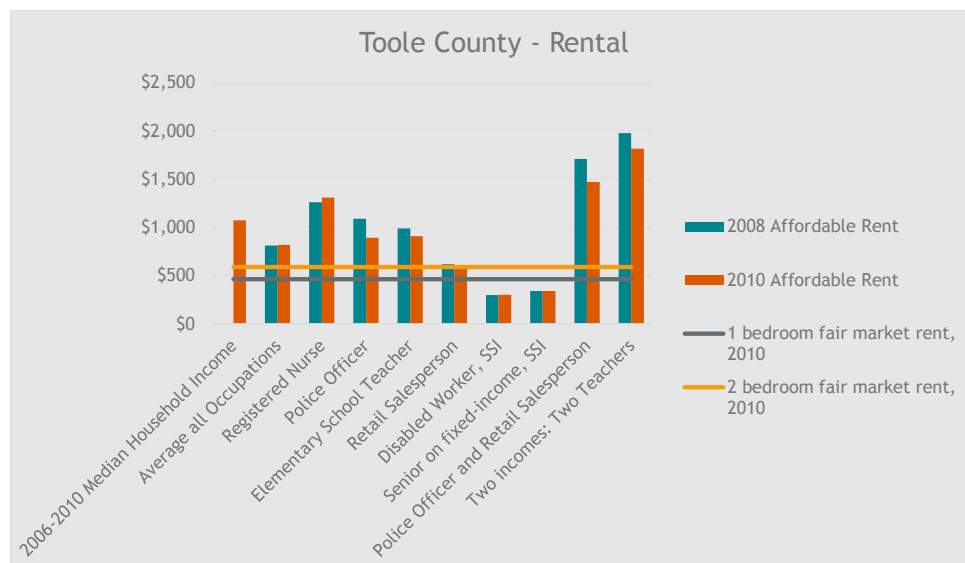
Source: Montana Department of Commerce

Figure 70: Affordable Homeownership Trends



Source: Montana Department of Commerce

Figure 71: Affordable Rental Rate Trends



Source: Montana Department of Commerce

Table 52: Population and Structure Size, Toole County

Toole County Population and Structure Data, 2010 Census			
	2000	2010	% Change
Homeownership Rates:	71.5%	67.1%	
Population:	5,267	5,324	1.1%
Owner Occupied Units:	1,396	1,352	-3.2%
Renter Occupied Units:	566	663	17.1%
Total Households:	1,962	2,015	2.7%
Vacant Units:	338	321	-5.0%

Source: Montana Department of Commerce

When asked about worker characteristics to determine general housing needs, employers stated a need for quality rental housing units. They expressly stated that having more duplex or townhome units were needed to help make homeownership affordable for some of their employees who could not otherwise afford a traditional single-family home. Although single-family homes were needed, employers noted having quality single-family homes were more important than creating mass amounts of similar housing types. As noted from other interviews across the region, temporary workers would prefer to rent quality units with updated features that were constructed post year 2000.

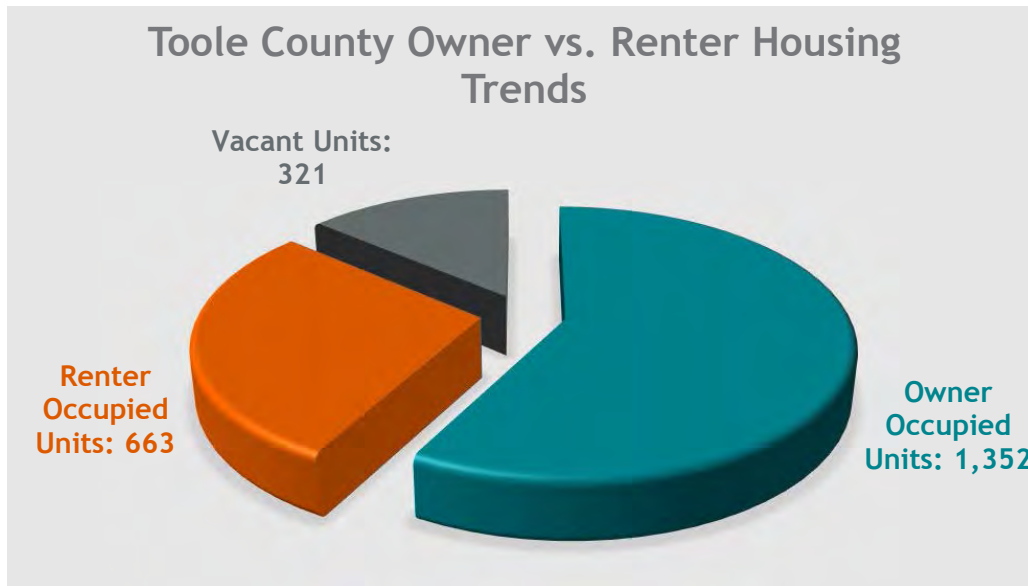
KLJ concluded that Toole County may have difficulty meeting housing demand based on projected employment of more than 280 new jobs in the county through 2020. Businesses were unable to confidently state where expansion plans would occur or where new employees would be hired and would live; therefore, it is extremely difficult to project how many employees will live in the county in which they work or whether they will find housing elsewhere. KLJ estimated the number of new housing units needed based on population forecasts and the average household size. The two projections used were Woods & Poole data, which includes an estimated household size projection and the US Census. Since the

Census does not include such numbers, KLJ used the 2010 Census household size for MT CEIC projections.

Based on MT CEIC models and Woods & Poole data, Toole County will need to add approximately 50 to 90 new housing units in the next five years to meet demand. If all 284 projected new employees were to locate within Toole County, the county would have a shortfall of approximately 190-230 housing units. When units in poor condition – units that need substantial improvements to make the structures livable – are included in the overall estimate, then housing becomes a substantial investment for all communities within the county.

Information provided by the Department of Commerce indicates Toole County had nearly 25 percent of its housing in poor condition in 2010. When factoring in unmet housing needs, Toole County will need to improve an additional 436 rental and owner-occupied units or approximately 17 percent of total units to meet unmet housing needs by 2020. When housing demand from population and employment growth and unmet housing needs are combined, the county is projected to need 486 to 526 housing units to meet demand and correct unmet housing needs. An additional 90 to 150 units may also be needed to correct for projected employment growth through 2020, thus raising the total number of housing units needed to 735 to 860.

Figure 72: Owner versus Renter Housing Trends



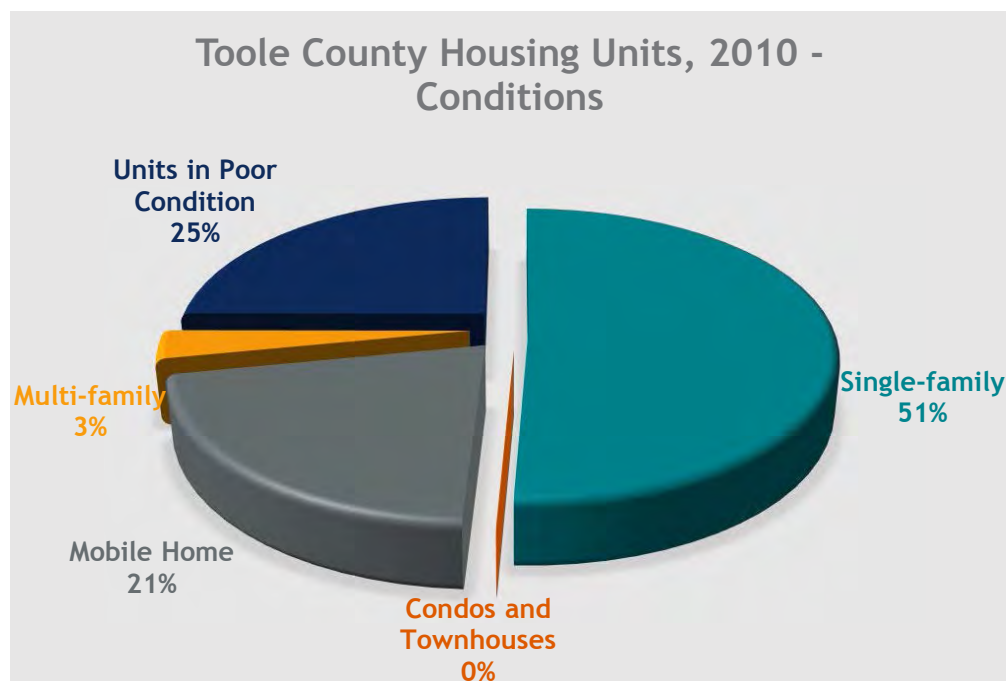
Source: Montana Department of Commerce

Table 53: Housing Unit Conditions, Toole County

	Total Housing Units	Units in Poor Condition, 2010	% of Total	Units in Acceptable Condition, 2010	% of Total
Total housing units	2,438	608	24.9%	1,830	75.1%
Single-family	1,679	442	18.1%	1,237	50.7%
Condos and Townhouses	0	0	0.0%	0	0.0%
Mobile Home	571	55	2.3%	516	21.2%
Multi-family	188	111	4.6%	77	3.2%

Source: Montana Department of Commerce

Figure 73: Housing Unit Conditions



Source: Montana Department of Commerce

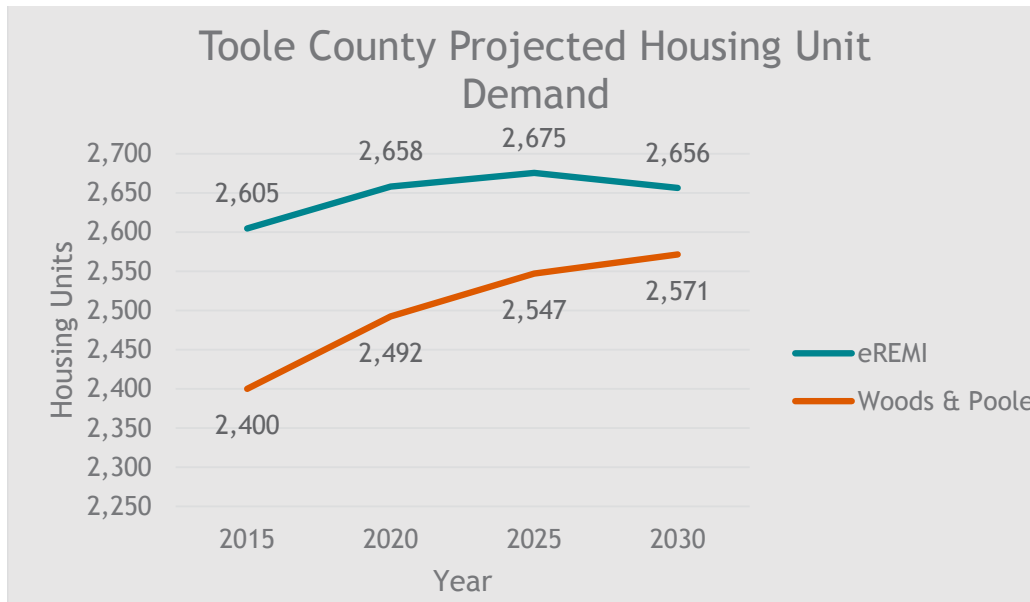
Table 54: Housing Units by Structure Size, Toole County

Housing Unit Type	
1 Unit Detached	1,571
1 Unit Attached	43
2 Units	45
3-4 Units	23
5-9 Units	55
10-19 Units	148
20 or more Units	5
Mobile Homes	151
Boat, RV, van, etc.	0
<b>Total</b>	<b>2,041</b>

Source: US Census Bureau



Figure 74: Projected Housing Demand Toole County



Source: Woods & Poole, Montana Department of Commerce

Table 55: Toole County Projected Unmet Housing Needs

Percent of MFI	Total Renter and Owner				
	Elderly	Small Related	Large Related	Other	Total
<b>2015</b>					
0.0-50.0%	70	70	32	70	241
50.1-80.0%	35	37	23	18	113
80.1-95.0	13	8	4	9	33
Above 95.0%	13	37	4	4	57
<b>2020</b>					
0.0-50.0%	68	68	31	68	236
50.1-80.0%	35	36	23	18	111
80.1-95.0	13	8	4	9	33
Above 95.0%	13	36	4	4	56
<b>2025</b>					
0.0-50.0%	68	68	31	68	235
50.1-80.0%	34	36	23	18	109
80.1-95.0	13	8	4	9	32
Above 95.0%	13	36	4	4	56
<b>2030</b>					
0.0-50.0%	68	68	31	68	235
50.1-80.0%	34	36	23	18	109
80.1-95.0	13	8	4	9	32
Above 95.0%	13	36	4	4	56

Source: Montana Department of Commerce

Note: Rounding errors were noted in the Montana Housing Needs Assessment Report

## Infrastructure

Toole County is expected to have the fewest required infrastructure upgrades to accommodate growth with less than \$4.4 million needed for improvements. This is partially a result of the county and communities upgrading systems within the last few years to accommodate projected growth from a similar study that was completed for the county in 2012.

Sewer was the greatest impact to communities with more than \$4.1 million needed in funding. Shelby and Sunburst had the largest costs and were in the process

of submitting applications to funding agencies in 2014, expanding Shelby's treatment plant and repair to Sunburst's lift station. Kevin also had a \$100,000 planned improvement to correct issues with their system as they are currently under DEQ's administrative order.

Dunkirk has a minor upgrade (\$100,000) so the community may connect to Shelby's water system, Sunburst needs approximately \$150,000 to upgrade wells in order to accommodate future growth. Shelby's system can accommodate approximately 2,000 additional connections before requiring expansion.

Toole County has 9 projects on MDT's STIP program with the majority of improvements occurring on I-15 near Shelby. Shelby also recently completed a transportation study that identified 28 projects totaling approximately \$55 million in improvement costs.

Landfills were a minor issue for Toole County as the City of Shelby's landfill can accommodate another 28-30 years before being closed. Future refuse would be shipped to the Northern Montana Joint Refuse Disposal District once Shelby's landfill closes.

Table 56: Toole County STIP (2014-2018)

Fiscal Year	Prefix	Project Name	Project Location	Project Length	Project Scope	Est Cost (\$Mill)
2014	IM	SHELBY - NORTH	I-15	14.58	CHIP SEAL	1 TO 5
2014	IM	SHELBY - N & S	I-15	11.19	CHIP SEAL	1 TO 5
2014	TA	MAIN STREET ADA RAMPS - SHELBY	US-2	0.24	ADA SIDEWALK RAMPS	<1
2014	STPS	SUNBURST - EAST	S-552	8.82	MILL & FILL	<1
2015	NH	GALATA - E&W	US-2	8.29	REHAB - MAJOR	<1
2015	NHPB	BRIDGE PRESERVATION - SHELBY	I-15	0.48	BRIDGE DECK	1 TO 5
2015	STPE	CHAMPIONS PARK WALKS - SHELBY			SIDEWALK	<1
2016	STPS	JCT MT 217 - SOUTH	S-343	10.13	RECONSTRUCTION	<1
2017	STPS	JCT MT 217 - SOUTH	S-343	10.13	RECONSTRUCTION	<1

Source: MDT

Table 57: Toole County Sewer Improvements

Toole County	Sewer System				
Community	Type of System	At Capacity	Expansion Costs	Additional Connections Available	Comments
Shelby	Lagoon	Yes	\$3.3 million	N/A	Submitted to funding agencies in 2014 for treatment plant expansion.
Dunkirk (unincorporated)	Individual drainfields	N/A	N/A	N/A	N/A
Ethridge (unincorporated)	Individual drainfields	N/A	N/A	N/A	N/A
Kevin	Lagoon	Yes	\$100,000	N/A	Currently under administrative order but submitted to funding agencies in 2014. Kevin needs housing.
Sweetgrass (unincorporated)	Lagoon	No	N/A	40	Sweetgrass provides sewage disposal for Coutt's, AB, 2 cell lagoon was built 12 years ago. Does not discharge except through evaporation. Lagoon is equipped with a UV disinfection system.
Sunburst	Lagoon	Yes	\$700,000	N/A	Submitted to funding agencies in 2014 for lift station repair.

Table 58: Toole County Water Improvements

Toole County	Water System				
Community	Type of System	At Capacity	Expansion Costs	Additional Connections Available	Comments
Shelby	Wells	No	N/A	1,000-2,000	Connecting Cut Bank and Dunkirk/Devon to Shelby in 2014/2015.
Dunkirk (unincorporated)	Devon Water System from Marias River	Yes	Connected to Shelby's system in the summer 2014 (approximately \$100,000).	N/A	Once connected to Shelby, the Devon system will be obsolete.
Ethridge (unincorporated)	Connected to Shelby	No	N/A	Reference Shelby's system	Users are restricted to small amount but may not be because of infrastructure limitations.
Kevin	Wells	No	N/A.=	Many more	Currently under administrative order but should be lifted with recent improvements. Kevin needs housing.
Sweetgrass (unincorporated)	Milk River in AB, connected to Coutts, AB	No	N/A	20	Sometimes on water restrictions depending on the level of the Milk River. Purchase water from Coutts, Coutts is working on a treatment facility expansion.
Sunburst	Wells	Yes	\$150,000	N/A	Needs a new well to meet DEQ flow requirements.

These communities will eventually be connected to the NCMRWA system.

Table 59: Toole County Landfill Status

Toole County	Landfills	
Community	Name	Status
Shelby	City of Shelby Landfill, Class II, Shelby	The landfill is not at capacity. They have approximately 30 years of available space.
Dunkirk (unincorporated)		
Ethridge (unincorporated)		
Kevin		
Sweetgrass (unincorporated)		
Sunburst		

## Community Services

### LAW ENFORCEMENT

Toole County reported that the law enforcement staffing level is adequate, but it would be beneficial to increase jail personnel by three additional full-time staff. The department has no full-time detention staff. Instead, the County relies on cameras to watch inmates from the dispatch center.

Historically, the County had been staffed at 12 officers, but recently the department hired two additional staff. Turnover is a minor concern as it appears the major reason for leaving is better wages elsewhere. There had recently been a significant turnover of older officers so that the average age dropped from approximately 48 to around 30.

The jail facility was built in the 1970s and is in need of some updating to meet current standards. However, there is no detailed cost estimate available. The County and department are considering doing a study to complete a needs and cost analysis.

The county is also home to a federal detention center, although impacts to that facility were recorded with the private business interviews as it is managed by Corrections Corporation of America.

### FIRE DEPARTMENTS

#### TOOLE COUNTY FIRE DEPARTMENT

The department had no aerial equipment to reach buildings taller than two-stories or was able to provide

elevated stream protection for instances involving industrial fires. A 65-foot elevating platform was recommended to meet aerial fire applications. The estimated cost for such equipment was \$325,000 for a 1,500 gpm pumping truck and \$750,000 for an aerial truck. The existing fire hall needs minor improvements to accommodate increased staffing and was estimated to cost \$300,000. Staffing requirements, similar to all other departments throughout the study area, was the greatest issue as staffing levels were expected to nearly double in the next five years. The department is expecting to train and equip between 40 to 48 new volunteers to meet future growth needs. It was also deemed necessary to begin analyzing the need for a part-paid and part-volunteer staff to provide code enforcement, pre-fire planning and training.

### SCHOOLS

#### SHELBY SCHOOL DISTRICT

Shelby had a K-12 student population of approximately 450 students. Student teacher ratios vary based on the grade level, but were 20-25 students per classroom. The district could accommodate an additional 100 students

for existing grades, but would need to add additional staff and facilities for pre-K instruction. Staffing levels are adequate and the district did not anticipate difficulty in attracting teachers or paraprofessionals; however, bus drivers and janitors were estimated to be difficult positions to fill.

The district has an old building that it could reestablish if needed or a new building could be constructed, depending on design and property purchase price.

The district did not have planning-level costs for the improvement, but would need to complete a feasibility study before moving forward.

#### SUNBURST SCHOOL DISTRICT

Sunburst, which also includes children from Kevin, has a K-12 student population of approximately 229 children. Student-teacher ratios are well below the ratios outlined in Montana accreditation requirements. The school has had difficulty with recruiting qualified teachers. If a growth of 20 percent or more in student enrollment occurred they would need to add two support staff positions but no teachers.

Table 60: Toole County School Information

School District	Estimated Enrollment (K-12)	Student: Teacher Ratio	Facility Upgrade/Expansion Costs	Issues
Shelby	450	20-25:1	TBD Could accommodate 100 students	Housing for teachers; attracting bus drivers and custodians
Sunburst	229	10:1	TBD Could accommodate 50-75% growth	Retaining qualified teachers

Significant growth in the school district is not anticipated, so there is little expectation of need to add capacity. The facilities could easily accommodate 50-75 percent growth in student population before any expansions were needed.

## HOSPITALS, CLINICS AND EMS

Toole County is served by Marias Medical Center in Shelby. MMC has increased staff as a result of the recent economic activity such as a new prison, oil and gas exploration, expansion of railroad facilities, and expansion of border patrol. MMC has a 1:4 nurse to patient ratio with a 25-bed facility for ER and OB services and has another 63-bed skilled nursing facility along with a 40-room assisted living center.

Doctors and especially nursing staff seem to rotate through the center every few years; support staff such as administrative professionals also have a high turnover rate. MMC would prefer to expand service capacity with additional staff for direct care.

The facility does not have any immediate expansion plans but does have cost estimates for future needs including \$150,000 to expand OB rooms, \$500,000 to improve the waiting area and another \$150,000 for training and recruiting. EMS is provided by the Marias Medical Center. EMS staffing is tied to the Medical Center and will fluctuate as population rises or declines. However, critical positions required for successful operation include volunteer drivers and first responders.

## Strategies

Strategies for Toole County are similar to other counties included in this study.

### EMPLOYMENT

- » Collaborate with workforce development programs to create skilled-trade training programs for the following:
  - » Diesel mechanics
  - » Precision manufacturing
  - » Welders
  - » Accountants
  - » Nursing and health care staff
  - » Semi-truck drivers
- » Create scholarships for local students/youth to local/regional educational facilities or trade schools coupled with internships at local businesses to encourage youth to stay in the community. The program could be expanded to 2nd and 3rd year students from outside the region to encourage them to stay as well.
- » Provide education debt repayment for both traditional and trade schooling for younger employees willing to stay or relocate to the region.
- » Improve apprentice programs for trades (diesel mechanics, manufacturing, welders, electricians, plumbers and truck drivers) and encourage youth to move into and advance in these vital fields.
- » Develop a middle and high school career day with focus on the trades. Not every student has the goal of going on to higher education and should find the

same level of encouragement to pursue work in the trades.

### HOUSING

- » Begin addressing affordable housing for middle-income persons including teachers, law enforcement and small business owners.
  - » Policies may include inclusionary zoning, incentive based programs such as density bonuses or funding stream revenues from public agencies.
- » Coordinate with NeighborWorks Montana to find appropriate housing policies and affordable housing developers to begin developing a county-by-county plan on where to construct units.
- » Identify units in poor condition and units with unmet needs to create a working database that can be shared across the region; utilize HOME grants and low-interest or revolving loans funds to begin rehabilitating such structures.
- » Implement an education program on the 'rungs of home ownership' would be beneficial in each jurisdiction. Several employers stated that employees want more modern rentals and newer homes. The stark reality is that homes/apartments, which meet these definitions, typically rent/sell for more than what had traditionally been affordable.
- » Implement programs to acquire, renovate and remarket dwellings/rentals that are deemed to be substandard. Groups like NeighborWorks or the Montana Home Ownership Network may be able to help modernize and then sell or lease units. Lease-to-own programs for renovated housing should be considered.

- » Allow for modular homes, which are not manufactured homes, in zoning codes. Many modular homes are being built to the 2012 International Building Code Council Residential standards. This is a higher standard than required by the State of Montana via the Building Code and therefore modular homes tend to be more energy efficient.
- » Consider via each jurisdiction's Growth Policy and subdivision regulations to create developments that provide a mixture of lot sizes and permitted number of dwellings on a given lot. This is especially effective in areas where water and/or sewer is available to the lot.
- » In more rural areas consideration should be given to having Montana State Subdivision Law revised to allow for the creation of ½-acre lots with shared water and on-site septic systems. However, this would require changes to Montana state law and DEQ rules.
- » Business should, if possible, pursue options for telecommuting to improve quality of life and reduce transportation costs.
- » Create workforce housing near schools and business centers to address housing needs; jurisdictions should consider implementing workforce housing programs to offer incentives for affordable housing.

## INFRASTRUCTURE

- » Utilize PERs as a planning tool to prepare for grant requests; submit requests on time for funding cycles.
- » Develop impact fees to offset improvement costs with the money that is being spent, or needs to be spent, to improve or expand capacity. Service providers

should consider impact fees or other forms of capital reserves to defray costs of future expansions or replace capacity that is incrementally reduced with development. This is very important given the massive costs associated with improvements to water and waste water treatment systems and the dramatic reductions in grant funding to help pay for these required improvements/expansions.

- » Create and implement a comprehensive Capital Improvements Plan for jurisdictions, including water/sewer districts to help prioritize projects and establish user rates and potential increases.
- » Determine if user rates are in line with rates expected by Montana DEQ. End user rates for water/sewer are very important in obtaining grant.
- » Local governing bodies should analyze the status of local roads and streets and develop options to fund long-term maintenance. Quality local roads encourage quality development.
- » CDBG via the State of Montana Department of Commerce funds several Planning Grants on an annual basis. The Planning Grants are typically first come first serve.
- » CDBG also provides competitive construction grants that are administered at the state level. While the grants require a low to moderate income benefit there are ways to bring these funds into the most affluent communities

## LOCAL SERVICES

- » Develop a nursing job shadow program with the ability to train registered nurses in the area with an emphasis on serving critical access hospitals.

- » Implement law enforcement and fire district capital improvements including funds for personal protection equipment into the County's CIP to help offset costs.
- » Develop an incentive program for volunteer fire firefighters such as pay per response.
- » Collaborate with fire departments across the region including all five counties to explore joint/inter-local agreements to supplement a declining volunteer force.
- » Create a grant funding database for specific services to apply for and utilize Sweetgrass Development as the primary grant coordinator.
- » Explore the option of utilizing Payment in Lieu of Taxes (PILT) from the Federal Government to fund large capital improvements by setting aside these funds rather than using them to balance budgets.
- » Fire departments and EMS should pursue FEMA Grants and other Public Safety Grants available from the State of Montana (MDT and DOJ) to upgrade their radios and other communication equipment to solve communication problems.



The following grants were provided as a general guide for cities, counties, schools, law enforcement, fire departments and hospitals to understand what funding opportunities are available, eligibility requirements and cycle of funding requests.

## Housing

### FEDERAL GRANTS

#### HUD HOME INVESTMENT PARTNERSHIPS PROGRAM

Eligible applicants include community housing development organizations (CHDO), public housing authorities (PHA), and units of local government (counties and incorporated cities and towns) throughout the state (with the exception of Great Falls) and which receive HOME fund allocations directly from the Department of Housing and Urban Development (HUD).

Participating jurisdictions may choose among a broad range of eligible activities, using HOME funds to provide home purchase or rehabilitation financing assistance to eligible homeowners and new homebuyers; build or rehabilitate housing for rent or ownership; or for “other reasonable and necessary expenses related to the development of non-luxury housing,” including site acquisition or improvement, demolition of dilapidated housing to make way for HOME-assisted development, and payment of relocation expenses. Participating jurisdictions may use HOME funds to provide tenant-based rental assistance contracts of up to two years if such activity is consistent with their Consolidated Plan and justified under local market conditions.

**Contact:** Maureen Martin, 406 841 2826, maureenm@mt.gov

#### HUD CHOICE NEIGHBORHOODS PLANNING GRANTS

Eligible applicants include Native American Tribal organizations, public housing authorities/Indian housing authorities, city, county and township governments and non-profit organizations.

Eligible projects and programs include:

- 1) **Housing:** transform distressed public and assisted housing into energy efficient, mixed-income housing that is physically and financially viable over the long-term.
- 2) **People:** support positive outcomes for families who live in the target development(s) and the surrounding neighborhood, particularly outcomes related to residents – health, safety, employment, mobility and education.
- 3) **Neighborhood:** transform distressed, high-poverty neighborhoods into viable, mixed-income neighborhoods with access to well-functioning services, high quality public schools and education programs, high quality early learning programs and services, public assets, public transportation and improved access to jobs.

**Contact:** Grants Management Office, 202 708 0667, choiceneighborhoods@hud.gov

#### HUD FAIR HOUSING INITIATIVES PROGRAM (FHIP)

Eligible applicants include qualified Fair Housing Enforcement Organizations and non-profit groups organizing to build capacity to provide fair housing enforcement.

Eligible projects include activities supporting the continued existence of fair housing organizations in building capacity to enforce prohibitions on discrimination set forth in the Fair Housing Act.

**Contact:** Myron Newry, 202 402 7095, myron.p.newry@hud.gov

#### HUD HOPE VI MAIN STREET GRANT PROGRAM

Eligible applicants include city, county or township governments with a population of 50,000 or less and may not be served by a local, county, regional or state Public Housing Agency that administers more than 100 physical public housing units in the applicant jurisdiction.

Eligible projects include the replacement of unused commercial space in buildings with affordable housing units or by developing new affordable housing units that are in keeping with existing traditional architecture.

**Contact:** Lawrence Gnessin, 202 402 2676, lawrence.gnessin@hud.gov



### INDIAN COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM (ICDBG)

Eligible applicants include any Tribe, Band, Group or Nation (including Alaska Indians, Aleut and Eskimos) or Alaska Native village which has established a relationship to the federal government as defined in the program regulations. In certain instances, Tribal organizations may be eligible to apply.

The ICDBG program can provide funding for housing rehabilitation, land acquisition to support new housing construction, single or multipurpose community buildings and under limited circumstances, new housing and infrastructure construction. Infrastructure construction may include roads, water and sewer facilities. The program may also fund a wide variety of commercial, industrial and, agricultural projects which may be recipient owned and operated or owned and/or operated by a third party.

**Contact:** Kim Sereff, 303 672 5013, kimberly.a.sereff@hud.gov

### USDA HOUSING PRESERVATION GRANT

Eligible applicants include city or township governments, non-profit organizations, public housing authorities, Indian housing authorities and Tribes.

The purpose of the HPG program is to assist low-income homeowners in repairing and rehabilitating homes in rural areas and to assist rental property owners and cooperative housing complexes in repairing and rehabilitating their units if they agree to make such units available to low and very low-income persons.

**Contact:** Bonnie Edwards-Jackson, 202 690 0759, bonnie.edwards@wdc.usda.gov

### STATE LOANS

#### ALTERNATIVE ENERGY REVOLVING LOAN PROGRAM (AERLP)

Eligible applicants include Montana homeowners, small businesses, non-profits and government entities to install alternative energy systems.

Examples of eligible cost include solar panels that generate electricity (photovoltaic systems); solar panels for hot water and/or space heating; small wind generators, small hydropower plants (under 1 megawatt); biomass (wood) heating appliances and ground-source heat pump systems for space and water heating.

**Contact:** Alternative Energy Revolving Loan Program, 406 444 6697, deqaltenergyloan@mt.gov

#### SECTION 538 RURAL RENTAL HOUSING GUARANTEED LOANS

Eligible applicants are lenders who are approved and currently active with Fannie Mae, Freddie Mac, HUD/FHA insurance programs, Ginnie Mae, are a state or local Housing Finance Agency or if a member of the Federal Home Loan Bank System or other lender show they have experience with multifamily lending.

The loans will be used for new rural rental housing and appropriate related facilities with five or more dwellings.

**Contact:** Mary Bair, 406 841 2845, mbair@mt.gov

## Water and Sewer Infrastructure

### FEDERAL GRANTS

#### EDA PUBLIC WORKS AND ECONOMIC ADJUSTMENT ASSISTANCE PROGRAMS

Eligible applicants include state, county, city or other political subdivision of a state including a special purpose unit of a state or local government engaged in economic or infrastructure development activities, institutions of higher education, public or private non-profit organizations or association acting in cooperation with officials of a political subdivision of a state and Tribes.

**Public Works Program** – Provides investments to help distressed communities build, design or engineer critical infrastructure and facilities to make communities more economically competitive. Eligible projects through the Public Works Program include water and sewer system improvements, industrial parks and shipping and logistics facilities.

**Economic Adjustment Assistance** – Provides resources to plan and implement specific solutions to leverage existing regional economic advantages.

**Contact:** Robert Olson, 303 844 4715, rolson@eda.gov

#### INDIAN COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM (ICDBG)

Eligible applicants for assistance include any Tribe, Band, Group or Nation (including Alaska Indians, Aleut and Eskimos) or Alaska Native village which has established a relationship to the federal government as defined in

the program regulations. In certain instances, Tribal organizations may be eligible to apply.

The ICDBG program can provide funding for housing rehabilitation, land acquisition to support new housing construction, single or multipurpose community buildings and under limited circumstances, new housing and infrastructure construction. Infrastructure construction may include roads, water and sewer facilities. The program may also fund a wide variety of commercial, industrial, agricultural projects which may be recipient owned and operated or owned and/or operated by a third party.

**Contact:** Kim Sereff, 303 672 5013, Kimberly.A.Sereff@hud.gov

### **WATER AND ENVIRONMENTAL PROGRAMS**

Eligible applicants include rural areas and municipalities with a population of 10,000 or less. Eligible projects include drinking water, sanitary sewer, solid waste and storm drainage facilities. Water and Environmental Programs include Water and Waste Disposal Direct Loans and Grants, Water and Waste Disposal Guaranteed Loans and Pre-development Planning Grants.

**Contact:** Dan Johnson, 406 829 3393 ext 108, dan.johnson@mt.usda.gov

### **STATE GRANTS**

#### **MONTANA RENEWABLE RESOURCE GRANT PROGRAM**

Eligible applicants include political subdivisions of

state, local government including state agencies and universities, counties, incorporated cities and towns, conservation districts, irrigation districts, water/sewer/solid waste districts and Tribes. Eligible projects include drinking water, wastewater and solid waste development and improvement projects, irrigation rehabilitation, dam repair, soil and water conservation and forest enhancement. The deadline occurs on May 15 of even-number years.

**Contact:** Pam Smith, 406 444 6668, pamsmith@mt.gov

#### **TREASURE STATE ENDOWMENT PROGRAM CONSTRUCTION GRANTS**

Eligible applicants include incorporated cities and towns, counties, consolidated governments, Tribal governments and county or multi-county water, sewer or solid waste districts.

Eligible projects include drinking water systems, wastewater treatment facilities, sanitary or storm sewer systems, solid waste disposal and separation systems and bridges.

**Contact:** Becky Anseth, 406 841 2786, banseth@mt.gov

#### **TREASURE STATE ENDOWMENT PROGRAM PRELIMINARY ENGINEERING GRANTS**

Eligible applicants include incorporated cities and towns, counties, consolidated governments, Tribal governments and county or multi-county water, sewer or solid waste districts.

Eligible activities include preparation of plans, studies,

analyses or research required to complete a Preliminary Engineering Report.

**Contact:** Richard Knatterud, 406 841 2784, rknatterud@mt.gov

### **FEDERAL LOANS**

#### **WATER AND ENVIRONMENTAL PROGRAMS**

Eligible applicants include rural areas and municipalities with a population of 10,000 or less. Eligible projects include drinking water, sanitary sewer, solid waste and storm drainage facilities. Water and Environmental Programs include Water and Waste Disposal Direct Loans and Grants, Water and Waste Disposal Guaranteed Loans and Pre-development Planning Grants.

**Contact:** Dan Johnson, 406 829 3393 ext 108, dan.johnson@mt.usda.gov

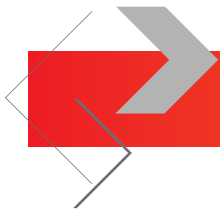
### **STATE LOANS**

#### **DRINKING WATER STATE REVOLVING FUND LOAN PROGRAM**

Eligible applicants include municipalities, public or private community water systems and non-profit non-community water systems.

Eligible projects include but are not limited to acquisition of land that is integral to the project, consolidating water supplies, engineering, new sources, treatment, source water protection, storage and distribution.

**Contact:** Paul Lavigne, 406 444 5321, plavigne@mt.gov



### **WATER POLLUTION CONTROL STATE REVOLVING LOAN PROGRAM**

The program provides loans at below market interest rates for water pollution control projects throughout the state of Montana.

Eligible applicants include publicly-owned wastewater facilities which includes incorporated communities and water and sewer districts.

**Contact:** Paul Lavign, 406 444 5321, [plavigne@mt.gov](mailto:plavigne@mt.gov)

## **Emergency Services**

### **STATE GRANTS**

#### **FEMA STAFFING FOR ADEQUATE FIRE AND EMERGENCY RESPONSE (SAFER) PROGRAM**

Funds can be used to rehire laid-off firefighters, alleviate retention of firefighters who face imminent layoff or filling positions vacated through attrition but not filled due to economic circumstances and hiring new firefighters.

Eligible applicants include fire departments and national, state, local or Tribal organizations that represent the interests of volunteer firefighters.

**Contact:** SAFER Help Desk, 866 274 0960, [firegrants@dhs.gov](mailto:firegrants@dhs.gov)

#### **FEMA ASSISTANCE TO FIREFIGHTERS GRANT**

Eligible applicants include fire departments, nonaffiliated EMS organizations and state fire training academies.

Funds can be used to help firefighters and other first

responders to obtain critically needed equipment, protective gear, emergency vehicles, training and other resources needed to protect the public and emergency personnel from fire and related hazards.

**Contact:** AFG Help Desk, 866 274 0960, [firegrants@dhs.gov](mailto:firegrants@dhs.gov)

#### **COMMUNITY FACILITY GRANT AND LOAN PROGRAM**

Eligible applicants are public entities such as municipalities, counties, and special-purpose districts, non-profit corporations and Tribal governments.

Eligible projects which loan funds may be used for include the construction, enlargement or improvement of community facilities for health care, public safety and public services with a priority to medical and rescue services.

**Contact:** Randy Robert, 406 727 7580 ext 4, [randall.roberts@mt.usda.gov](mailto:randall.roberts@mt.usda.gov)

#### **MONTANA VOLUNTEER FIRE ASSISTANCE PROGRAM**

Eligible applicants include communities with a population less than 10,000 or a combined group of small communities who have a population more than 10,000 that will organize, train and equip local forces for prevention and suppression of wildfires.

Eligible projects and programs eligible for funds include formation of rural and volunteer fire districts, fire plans, structural fire protection, wildland fire protection,

communications systems, conversion of excess military property, new equipment purchases and Wildland Personal Protective Equipment (PPE).

**Contact:** Doug Williams, 406 622 5455, [dwilliams4@mt.gov](mailto:dwilliams4@mt.gov)

### **FOUNDATION GRANTS**

#### **EDWARD BYRNE JUSTICE ASSISTANCE GRANT (JAG) PROGRAM**

Eligible applicants include states and territories and units of local government identified annually in the JAG allocation charts. JAG funds programs related to law enforcement, prosecution and court, prevention and education, corrections and community corrections, drug treatment and enforcement, planning, evaluation and technology improvement, and crime victim and witness initiatives. Request must be at least \$25,000 and does not require a match.

**Contact:** BJA Justice Information Center, 877 927 5657, [JIC@telesishq.com](mailto:JIC@telesishq.com)



Transportation											
Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
DOT Transportation Infrastructure Finance and Innovation Act (TIFIA)	X	X	X								
Transportation Alternatives Program	X	X	X	X			X				
EDA Planning and Local Technical Assistance Programs	X	X	X	X	X		X				X
Treasure State Endowment Program Construction Grant - Bridge Infrastructure	X	X	X								
Treasure State Endowment Program Preliminary Engineering Grant - Bridge Infrastructure	X	X	X								
FTA Bus and Bus Facilities Program	X	X		X							
USDA Intermediary Relending Program Loans										X	
DOT Public Transportation on Indian Reservations; Tribal Transit Program Discretionary Grants			X								
SBA 504 Loan Program						X					
DOT Transportation Investment Generating Economic Recovery (TIGER)	X	X	X								
DOT Elderly and Persons with Disabilities				X							
Rail											
Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
EDA Planning and Local Technical Assistance Programs	X	X	X	X	X		X				X
Montana Essential Freight Rail Loan Program	X	X				X		X			
DOT Railroad Safety Technology Grants	X	X				X		X			



### Aviation

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
Montana Aeronautics Division Loan and Grant Program									X		
FAA Airport Improvement Program									X		

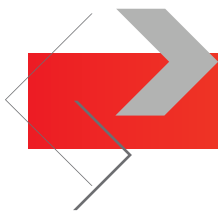
### Land Use Purchases

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
EDA Planning and Local Technical Assistance Programs	X	X	X	X	X		X				X
USDA Community Facility Grant and Loan Program	X	X	X	X	X		X				
USDA Business and Industry Guaranteed Loan Program	X	X	X	X	X						
USDA Intermediary Relending Program Loans										X	
Big Sky Economic Development Trust Fund	X	X	X								
SBA 504 Loan Program						X					

## Housing

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
HUD HOME Investment Partnerships Program	X	X									
The Alternative Energy Revolving Loan Program (AERLP)	X	X	X	X		X					
HUD Fair Housing Initiative Program				X							
HUD HOPE VI Main Street Grants	X	X									
HUD Indian Community Development Block Grant Program			X								
USDA Rural Community Development Initiative	X	X	X	X							
USDA Housing Preservation Grant Program	X	X	X	X							
USDA Section 538 Rural Rental Housing Guaranteed Loans										X	





### Water and Wastewater

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
Drinking Water State Revolving Fund	X	X		X							
Water Pollution Control State Revolving Fund (WPCSRF) Loan Program	X	X		X							
USDA Water and Waste Disposal Loans and Grants	X	X	X								
USDA Water and Waste Disposal Guaranteed Loans										X	
USDA Predevelopment Planning Grants	X	X	X								
EDA Public Works and Economic Adjustment Assistance Grant Program	X	X	X	X	X		X				X
Montana Renewable Resource Grant Program	X	X	X								
Treasure State Endowment Program Construction Grant - Water Infrastructure	X	X	X								
Treasure State Endowment Program Preliminary Engineering Grant	X	X	X								
Indian Community Development Block Grant Program			X								
SBA 504 Loan Program										X	

### Parks and Rec

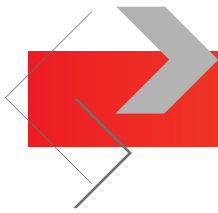
Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
USDA Community Facility Grant and Loan Program	X	X	X	X	X		X				
Transportation Alternatives Program	X	X					X				
Montana Recreational Trails Program	X	X		X							
Community Forest Program	X	X	X	X							

### Emergency Services

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
EDA Planning and Local Technical Assistance Programs	X	X	X	X	X		X				X
USDA Community Facility Grant and Loan Program	X	X	X	X	X		X				
Staffing for Adequate Fire and Emergency Response Program					X						
Montana Volunteer Fire Assistance Program (VFA)					X						
Assistance to Firefighters Grant					X						
Emergency Management Performance Grants (EMPG) Program											X
Edward Byrne Justice Assistance Grant (JAG) Program	X	X			X						

### Electric and Telecommunications

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
Rural Broadband Access Loans and Loan Guarantee	X	X	X	X		X					
USDA High Energy Cost Grant Program	X	X	X	X		X					
The Alternative Energy Revolving Loan Program (AERLP)	X	X	X	X		X					
USDA Community Connect Grant	X	X	X	X		X					X

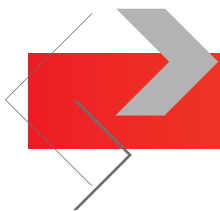


## Education

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
The Alternative Energy Revolving Loan Program (AERLP)	X	X	X	X		X					
USDA Distance Learning and Telemedicine (DLT) Grant Program	X	X	X	X	X	X	X				X
Five Star and Urban Waters Restoration Grant Program	X	X	X	X		X	X				
NEH Challenge Grants				X		X	X				
Community Development Block Grant	X	X									
Rural Economic Development Loans and Grants				X							
USDA Community Facility Grant Program	X	X	X	X	X		X				

## Economic Development

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
Community Development Block Grant	X	X									
USDA Community Facility Grant Program	X	X	X	X	X		X				
EDA Public Works and Development Facilities Program	X	X	X	X	X		X				X
EDA Public Works and Economic Adjustment Assistance Grant Program	X	X	X	X	X		X				X
USDA Business and Industry Guaranteed Loans	X	X	X	X		X					
HOPE VI Main Street Grants	X	X									
Indian Community Development Block Grant Program			X								
USDA Intermediary Relending Program Loans										X	
EDA Planning and Local Technical Assistance Programs	X	X	X	X	X		X				X
USDA Rural Business Enterprise Grants	X	X	X	X		X	X				
Rural Economic Development Loans and Grants				X							
SBA 504 Loan Program										X	
Big Sky Economic Development Trust Fund	X	X	X								
Rural Community Development Initiative				X		X					



### Business Incubators

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
Rural Business Opportunity Grant Program	X	X	X	X		X	X				
SBA 504 Loan Program										X	
EDA Public Works and Economic Adjustment Assistance Grant Program	X	X	X	X	X		X			X	
Big Sky Economic Development Trust Fund	X	X	X								
The Alternative Energy Revolving Loan Program (AERLP)											
USDA Business and Industry Guaranteed Loans	X	X	X	X		X					
USDA Intermediary Relending Program Loans										X	
USDA Rural Business Enterprise Grants	X	X	X	X		X	X				
USDA Rural Business Opportunity Grants	X	X	X	X		X	X				
SBA 504 Loan Program										X	

### Medical

Funding Title	Cities	Counties	Tribes	Non-profits	Emergency Services/ Medical Facilities	Businesses	Schools	Railroads	Airports	Intermediaries	States
USDA Distance Learning and Telemedicine (DLT) Grant Program	X	X	X	X	X	X	X				X
USDA Community Facility Loans and Grants	X	X	X	X	X		X				
Montana Capital Assistance Program					X						
Small Rural Hospital Improvement Grant Program					X						
Rural Economic Development Loans and Grants				X							

Sweetgrass Development and KLJ concluded that the project itself was a success as 64 of 100 businesses responded with quality information that was used to analyze and estimate that approximately more than 1,800 total jobs are projected to be added through year 2020 throughout the Sweetgrass Region. More than 1,400 permanent jobs are projected to be created and more than 300 jobs are projected to be temporary.

Businesses expressed optimism for future growth, employment gains, wage increases and operational expansion. The vast majority of businesses interviewed stated that the ability to hire qualified candidates will be the greatest issue moving forward followed by the lack of affordable housing for current and future employees. General comments regarding workforce characteristics, issues facing their respective companies and ideas for mitigating impacts are summarized below.

- » Expand workforce training programs at local colleges and universities; deemed critical for growth
- » Training individuals was a top priority for expanding business
- » Offer wage increases and retention bonuses for employees after one year of employment
- » Ideal candidate consisted of someone willing to work and be trained
- » Most desired skills/trades were accountants, diesel mechanics, drafters, engineers, oilfield personnel, truck drivers and welders

- » Identify potential affordable housing programs and housing units available for low-to-middle income persons
- » Develop workforce housing programs throughout the counties
- » Support cities and counties that require affordable housing through policies

Community services providers (police, fire, schools, hospitals and EMS) and public infrastructure providers (cities, counties, water/sewer districts) all expressed the need to coordinate efforts as growth occurs throughout the region. Most community service providers had adequate staffing levels and facilities to accommodate growth should it occur; however, retention was the largest issue across all community services providers followed by affordable and adequate housing options for staff.

Specific recommendations and strategies for communities including community service providers are outlined in county impact assessment profile. The data, findings, recommendation and strategies outlined for each county should be utilized to update existing growth policies; land use, economic and housing studies; capital improvement programs and comprehensive economic development (CED) strategy plans.

# PUBLIC PARTICIPATION PROCESS

Sweetgrass Development conducted an extensive public input process to announce and kick-off the study as well as to collect responses from the general public, identified stakeholders, private businesses, city and county elected officials and staff, and the Sweetgrass Board of Directors. The general public had two different opportunities throughout the study to comment on the proposed process and outcomes of the project; each county conducted a kick-off meeting and initial findings meeting to gather public comment. A third public opportunity was afforded at the Sweetgrass Board of Directors meeting in September 2014 to report on the status of the project; all Sweetgrass Board of Directors meetings were open to the public.

The following is a list of public input meetings and opportunities conducted throughout the study.

## PROJECT KICK-OFF MEETINGS

### MONDAY, MARCH 10, 2014

- 12:00 pm Shelby Chamber of Commerce weekly meeting Sports Club, 210 Main Street, Shelby, MT
- 5:00 pm Conrad Community Center, 311 S Virginia Street, Conrad, MT

### TUESDAY, MARCH 11, 2014

- 1:00 pm Glacier County Annex, 1210 East Main Street, Cut Bank, MT
- 5:00 pm Teton County Courthouse, 101 Main Avenue S, Choteau, MT

### WEDNESDAY, MARCH 12, 2014

- 12:00 pm Sweetgrass Development Office, DES conference room, 521 1st Avenue NW, Great Falls, MT

## SWEETGRASS BOARD OF DIRECTORS MEETINGS

### WEDNESDAY, DECEMBER 11, 2013

- 1:00 pm Glacier County Annex, 1210 East Main Street, Cut Bank, MT

### TUESDAY, JUNE 17, 2014

- 1:00 pm Farmer's Daughter Restaurant, 405 S Main Street, Conrad, MT

### TUESDAY, SEPTEMBER 9, 2014

- 1:00 pm Glacier County Annex, 1210 East Main Street, Cut Bank, MT

### MONDAY, NOVEMBER 17, 2014

- 1:00 pm Sweetgrass Development Office, DES conference room, 521 1st Avenue NW, Great Falls, MT

## PUBLIC INPUT AND FINDINGS/RECOMMENDATIONS MEETINGS

### WEDNESDAY, OCTOBER 15, 2014

- 12:00 pm Great Falls Chamber of Commerce conference room, 100 1st Avenue North, Great Falls, MT

- 5:45 pm Fairfield Town Office, 603 Central Avenue, Fairfield, MT

### MONDAY, OCTOBER 20, 2014

- 5:15 pm Cut Bank City Office, 221 W Main Street, Cut Bank, MT

### TUESDAY, OCTOBER 21, 2014

- 12:00 pm Conrad City Hall, 413 Main Street, Conrad, MT
- 5:30 pm Choteau City Office, 38 1st Avenue NW, Choteau, MT

### THURSDAY, OCTOBER 23, 2014

- 5:00 pm Browning Town Hall, 124 2nd Avenue NW, Browning, MT

### MONDAY, NOVEMBER 17, 2014

- 6:30 pm Shelby Town Hall, 112 1st Street South, Shelby, MT