



# FINAL REPORT

AWARDED TO  
Sweetgrass Development

AUTHORED BY  
KLJ

EDA PROJECT NUMBER  
Short Term Planning Assistance Grant Award  
#05-86-05317

NOVEMBER 26, 2014

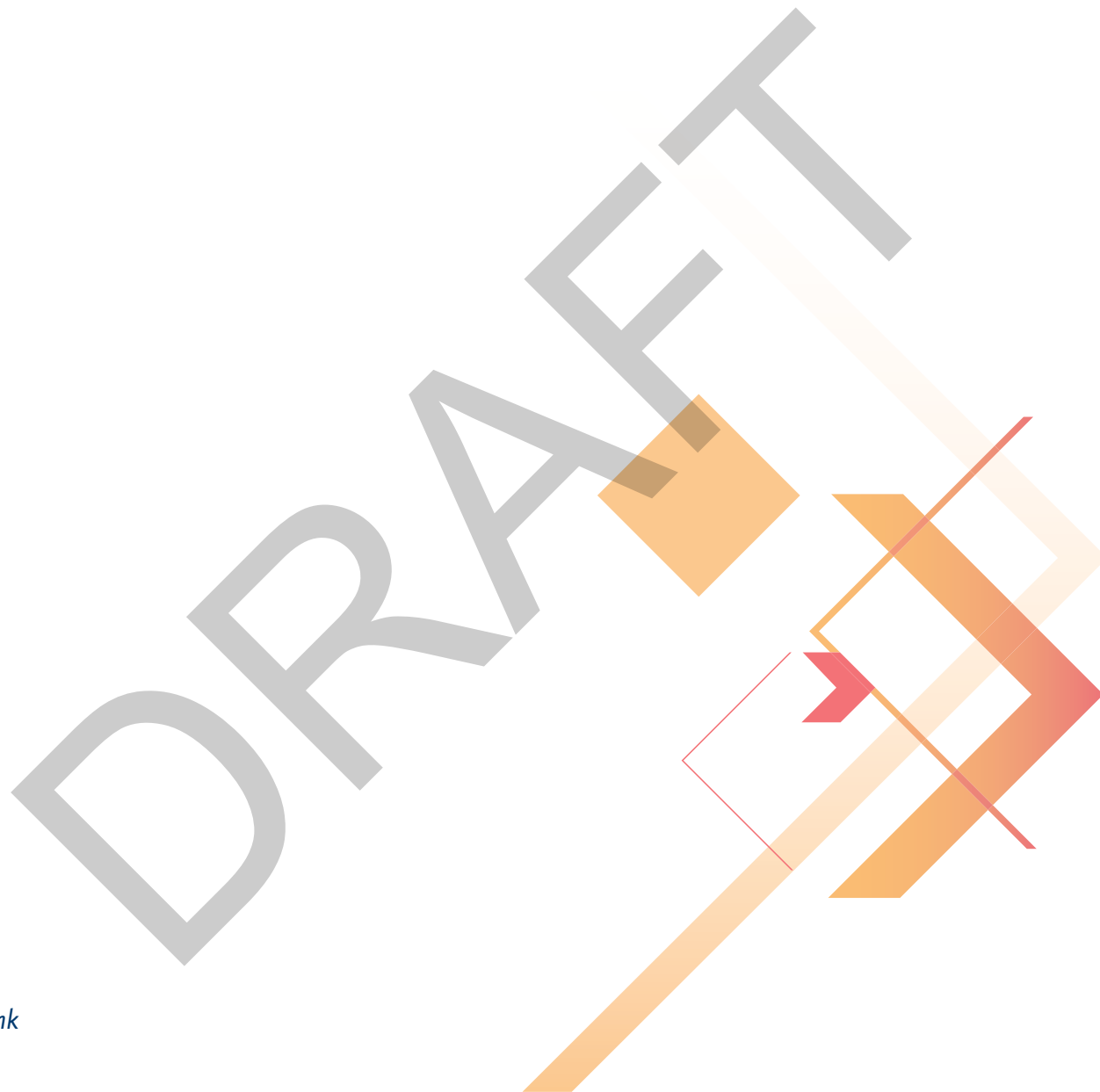
## SWEETGRASS REGION IMPACT STATEMENT



This report was prepared under an award  
from the US Department of Commerce  
Economic Development Administration.

**SWEETGRASS DEVELOPMENT**





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# Sweetgrass Region Impact Statement

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November 26, 2014

*This publication was prepared by Sweetgrass Development. The statements, findings, conclusions and recommendations are those of the author(s) and do not necessarily reflect the views of the Economic Development Administration.*



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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 Browning
- » City of Choteau
- » City of Conrad
- » City of Cut Bank
- » City of Great Falls
- » City of Shelby
- » Town of Fairfield
- » Port of North Montana Authority
- » Pondera Regional Port Authority
- » Sweetgrass Development Staff
  - » Sarah Converse – Executive Director
- » US Economic Development Administration
  - » Jodi Duncan – Program Specialist
- » KLJ Staff
  - » John How
  - » Shari Eslinger
  - » Joel Quanbeck
  - » Andrew Thierolf
  - » Jason Crawford
  - » Darcy Schmidt
  - » Carron Day

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 was on the cusp of development and expansion in a variety of venues including oil and gas, agricultural diversity and manufacturing. Each community and county was expected to experience impacts, which included increasing demands for housing, infrastructure and community services. The study area included Cascade, Glacier, Pondera, Teton and Toole Counties as well as 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 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, which were identified from key stakeholders including the Sweetgrass Development Board.

- » 62 of 100 businesses interviewed
- » 9 declined participate or were no longer in the area
- » 25 businesses did not respond or were unresponsive
- » 4 were asked to be emailed and not respond
- » Estimated impact of employment growth (directly from businesses)
  - » 1,196 permanent employees (at least two

The estimated employment impact through 2020 includes:

- 1,196 estimated permanent employees
- 281 estimated temporary employees
- 1,477 total employment growth

employers with more than 250 employee growth each, and one with an estimated 150 employment growth)

- » 281 temporary employees (classified as working less than 6 total months per year)
- » 1,477 total employment growth

## SCHOOL DISTRICT SUMMARY

KLJ contacted 31 school districts within the Sweetgrass region and concluded the following trends from interviews conducted to date.

- » 12 of 23 school districts responded
- » Most schools reported having significant capacity to handle more students; facilities were generally in good shape
- » 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 ideal to adequate from staffing levels
- » 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; retaining quality staff was a growing trend with declining enrollments in rural areas

» Overall, school districts were getting by, 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. Other results were as follows:

- » Seven departments were operating with adequate or barely-adequate equipment, and would have greatly benefited 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

The major issue facing hospitals was staffing rather than having enough space to accommodate growth. 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 what may have seemed like minor changes in the number of working personnel. 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 a key component during a September 2014 Sweetgrass Board meeting as an additional community service provided to be interviewed. As such, KLJ only received one response from Glacier County and collected responses until October 31, 2014 to provide a more accurate summary.

## 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 improvement 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 was 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 1,306 jobs will be added to the region and assuming each job earner has an average household size of 2.31, then approximately 2,245 people would 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 (500) of the workers and associated household size (1,100) will relocate to the region from outside the area.

A detailed migration study would be needed to determine specific population trends resulting from the economic impacts detailed in this study; however, using data

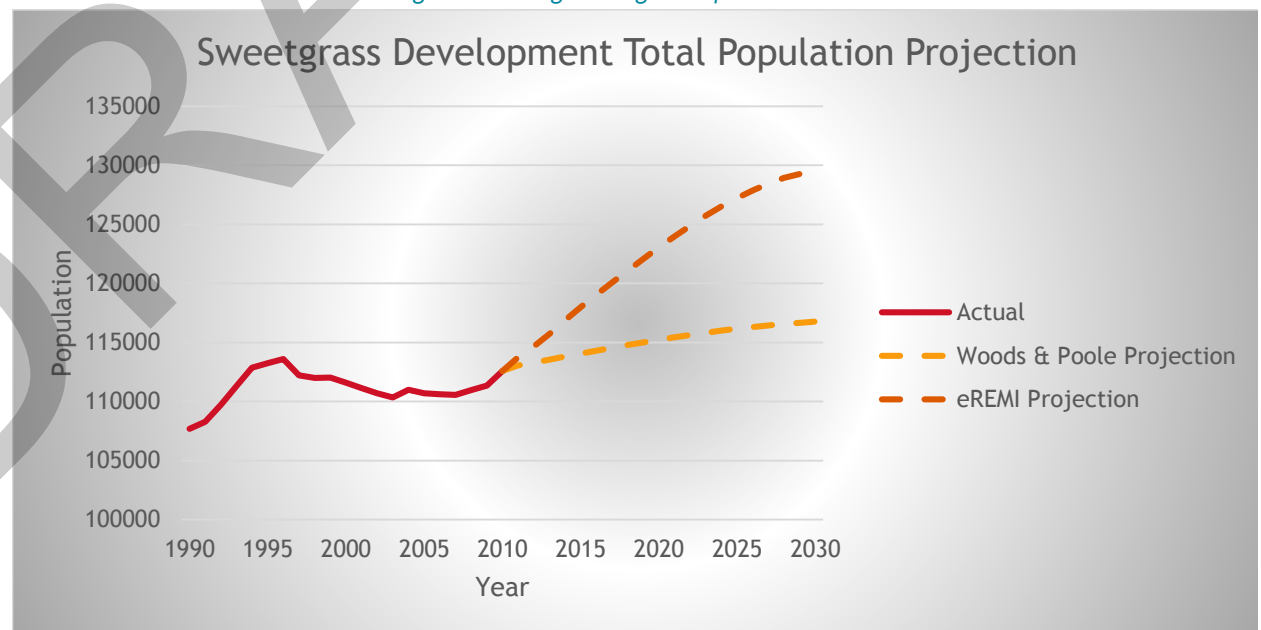
provided by the Montana Department of Commerce, KLJ concluded that the Sweetgrass Region is expected to add more than 1,000 people by year 2020 and nearly 3,000 by year 2030.

## Employment

Of the 47 businesses interviewed, the region is expected to add more than 1,306 total jobs to the region; 737 are estimated to be permanent employees and 196 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 0.5 (still determining multiplier effect from multiple studies, RIM-II and

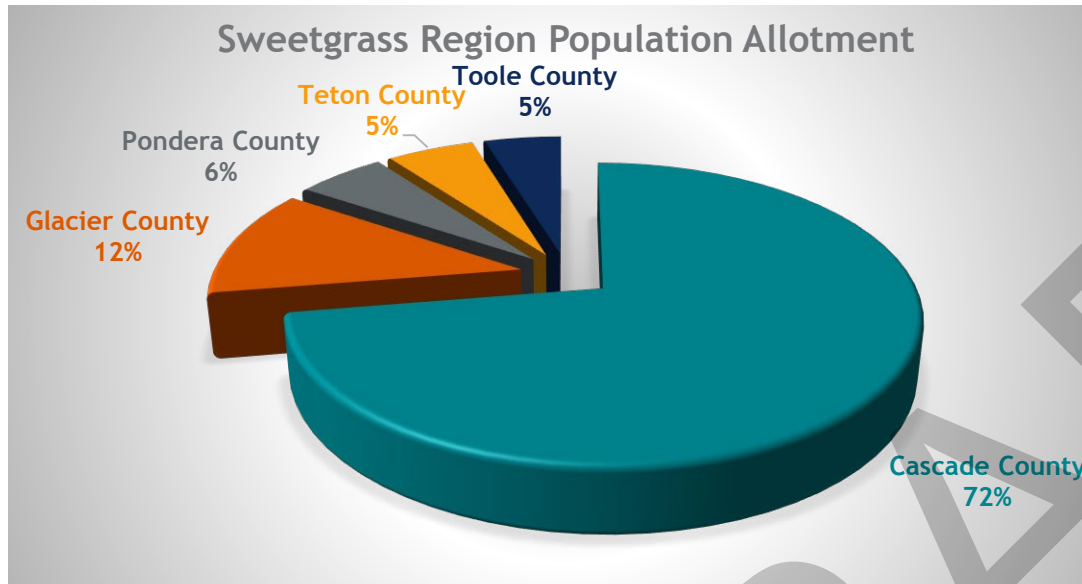
IMPLAN modeling data), then the total jobs added would be more than 1,800. While most businesses interviewed were unable to provide concrete numbers on the type of jobs added (machinist, administrative staff, engineer, etc.), KLJ was able to use data provided by Woods & Poole to cross-reference the data 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



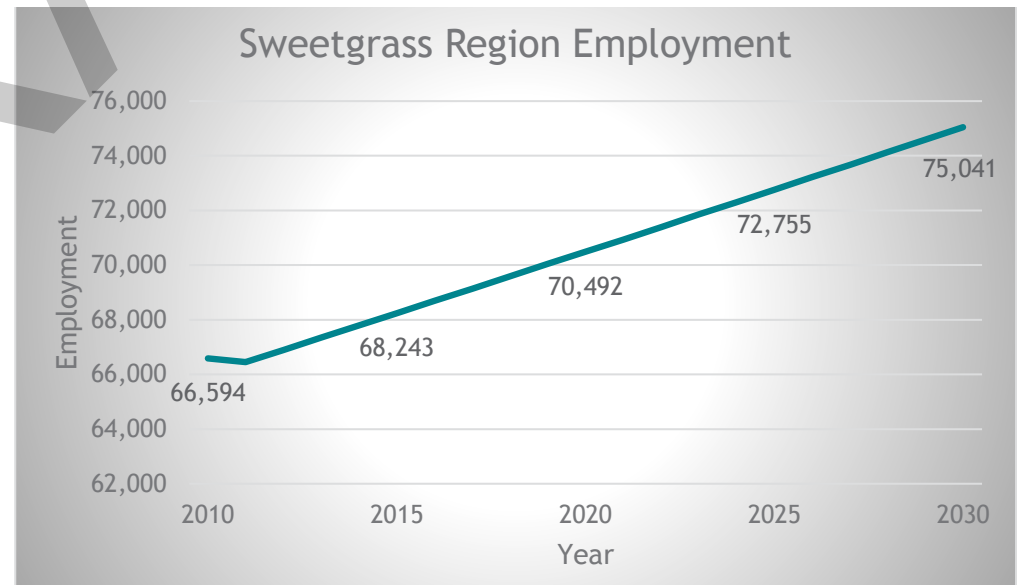
Source: Woods & Poole

Figure 2: Sweetgrass Region Population Allotment (2010)



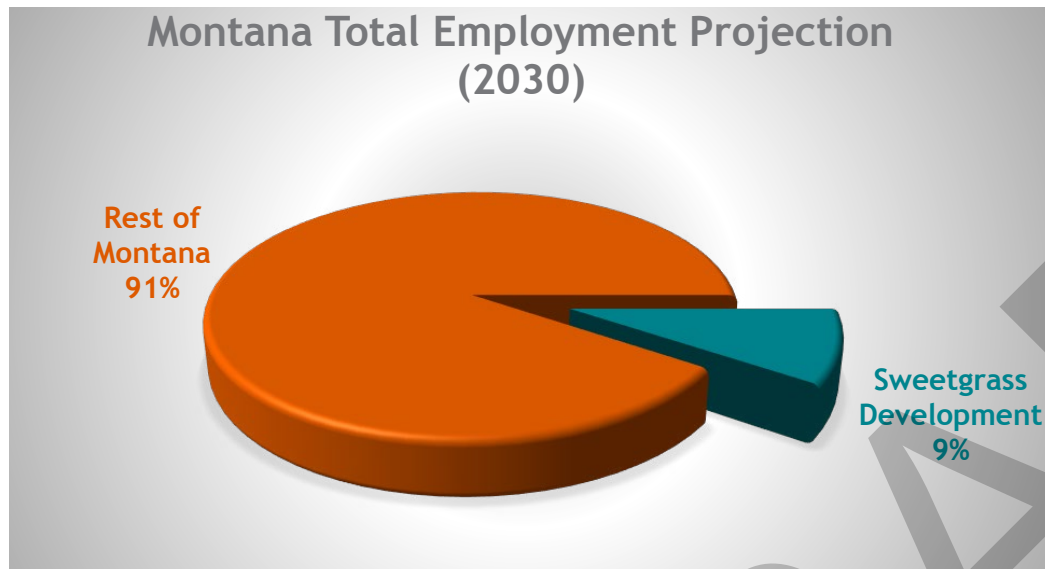
Source: US Census

Figure 3: Sweetgrass Region Employment Forecasts



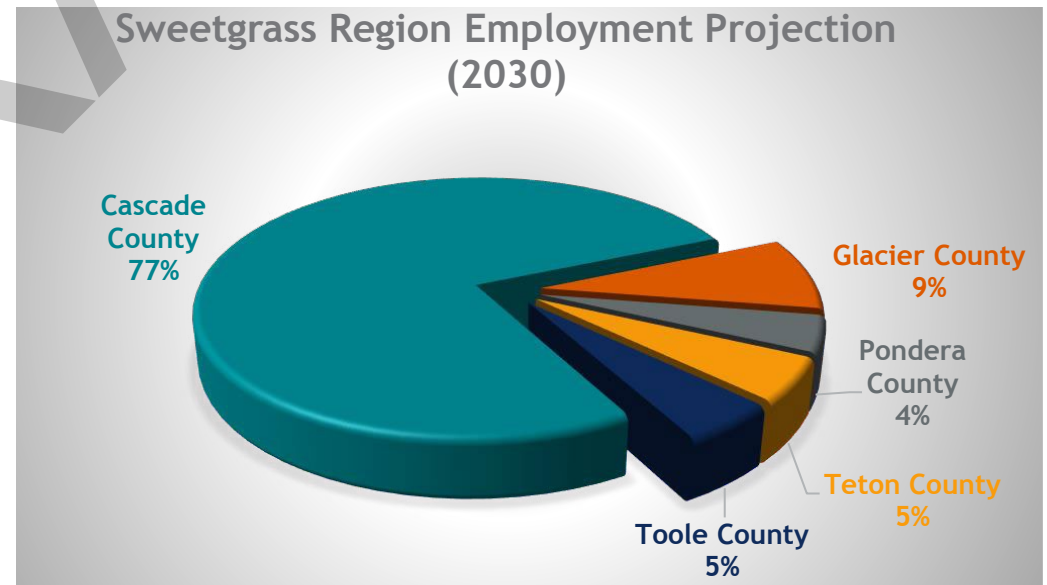
Source: Woods & Poole

Figure 4: Montana versus Sweetgrass Region Employment (2030)



Source: Woods & Poole

Figure 5: Sweetgrass Region Employment Projection (2030)

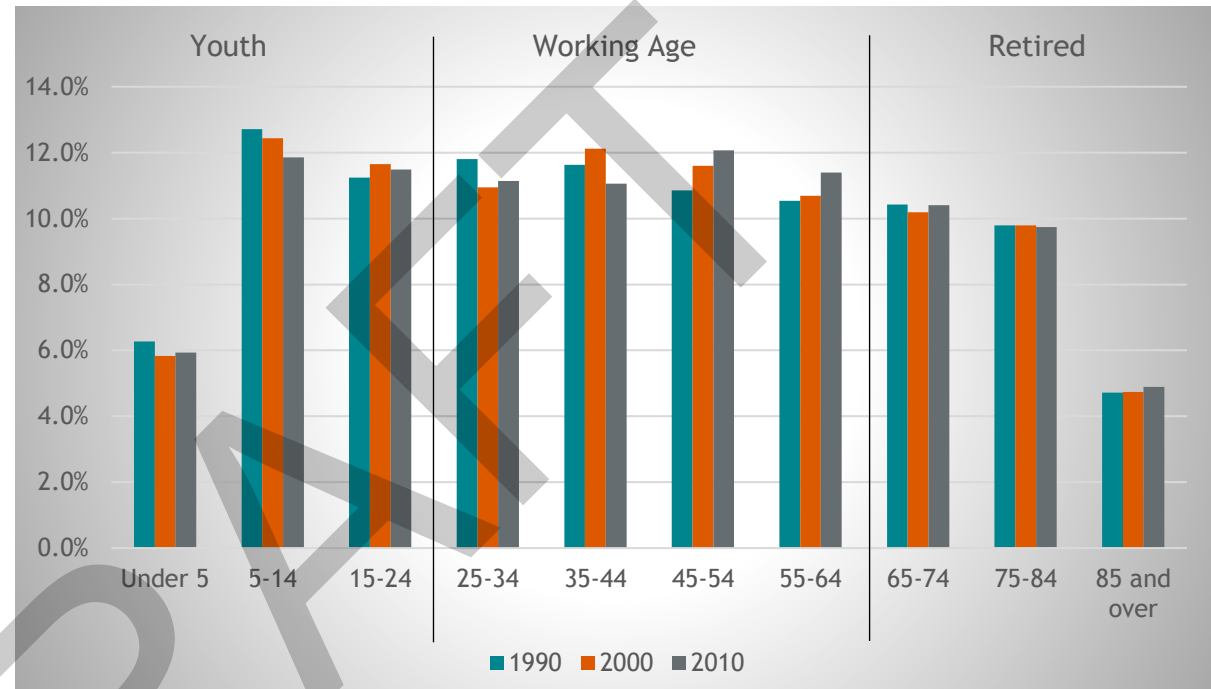


Source: Woods & Poole

Personal income is expected to rise incrementally and is expected to be well below that of rest of the United States; however, 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.

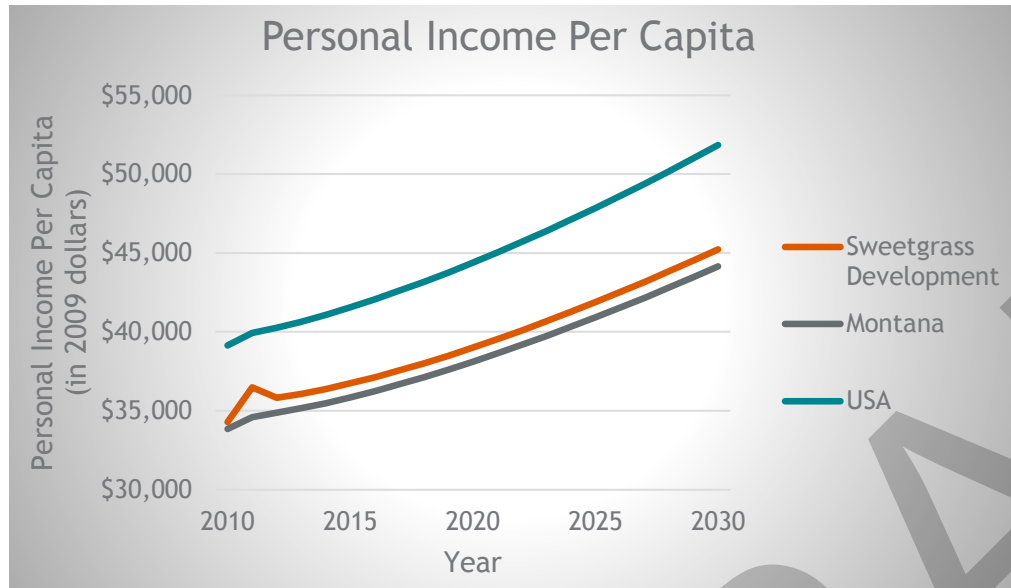
Figure 6: Sweetgrass Region Working Age Breakdown (1990, 2000, 2010)



Source: Woods & Poole

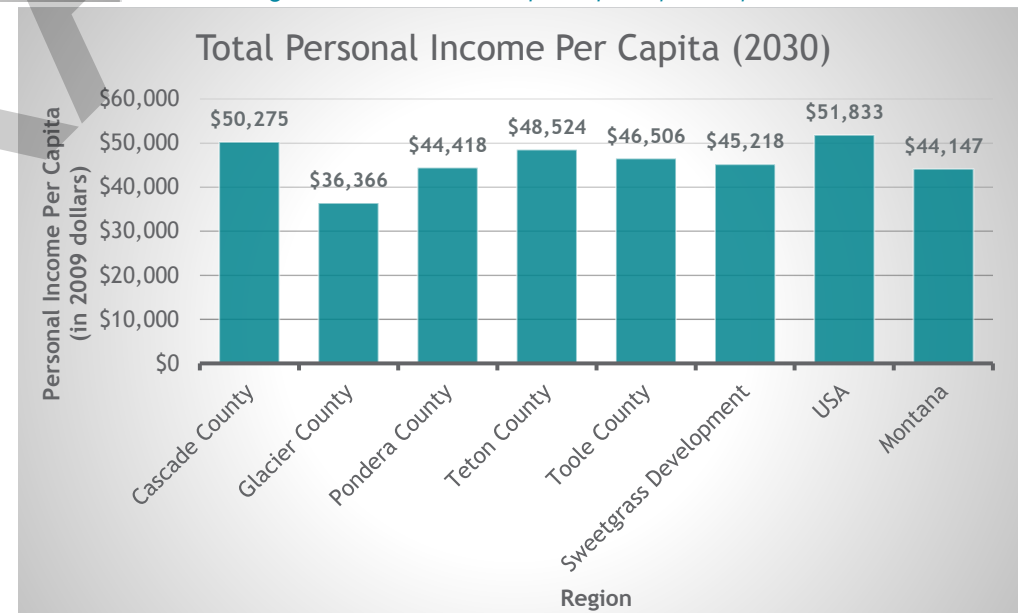


Figure 7: Personal Income per Capita Comparison



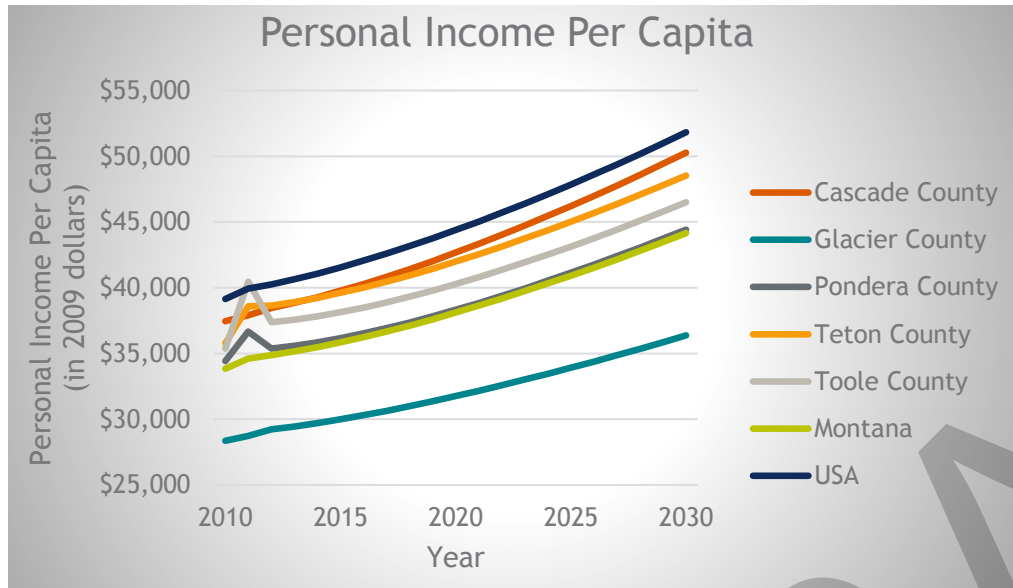
Source: Woods & Poole

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 just 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.

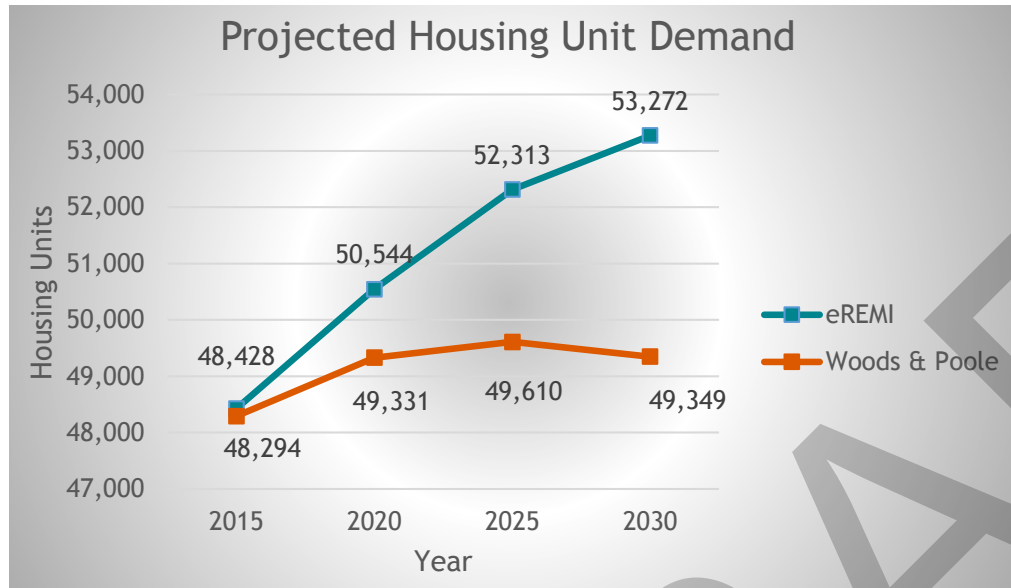
When asked about the type of housing employees needed, most businesses responded with mixed results ranging from single-bedroom apartments to multifamily complexes. However, the vast majority of employers stated that quality and affordable single-family homes were what most employees preferred. More 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.

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	
<b>Total with Unmet Needs</b>	<b>5,160</b>	<b>7,054</b>	<b>12,214</b>

Total Unmet Housing Needs

## Infrastructure

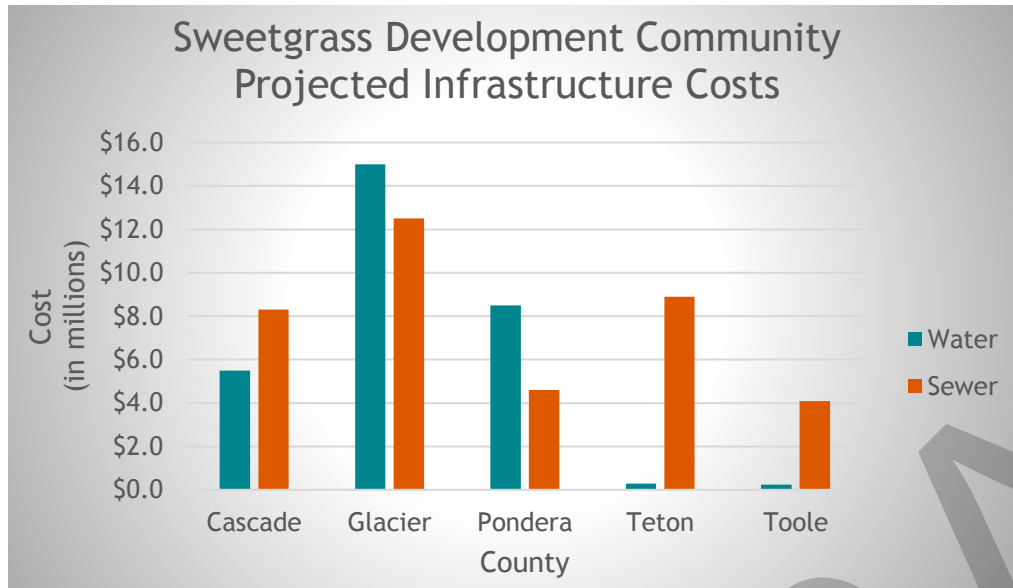
Infrastructure development was assessed to determine whether existing systems such as water, sewer and landfills could support potential employment growth and housing demand. Each county's specific assessments are included in more detail in their respective sections; however, the overall estimates obtained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

Table 2: MDT STIP for Sweetgrass Region

County	STIP Cost Estimate		
	# 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
<b>Sweetgrass Total</b>	<b>93</b>	<b>11</b>	<b>12</b>

levels that Cascade County did, and were thus prone to turnover. In other counties, dispatch or jail 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 \$150,000-240,000. 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.