Acknowledgements

Northern Rocky Mountain Economic Development District

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PROSPERA BUSINESS NETWORK
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http://nrmedd.org/

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Special Thanks to CEDS Committee

On behalf of the Staff, a special thanks to members of the NRMEDD CEDS Strategy Committee who provided guidance, support, outreach and technical knowledge to the creation of this Comprehensive Economic Development Strategy. Members of the CEDS Committee include:

- Kregg Aytes, Dean, Jake Jabs College of Business and Entrepreneurship, MSU
- Heather Belamy, Manager, NorthWestern Energy
- Debbie Berg, Director, Montana Job Service
- Pierre Martineau, Commissioner, Town of West Yellowstone
- Chris Naumann, Executive Director, Downtown Bozeman Partnership
- Joe Skinner, Commissioner, Gallatin County
- Jeren Starr, Account Representative, American Bank
- Jane Tecca, Advisor/Broker, Engel & VÖlkers
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I. Background Summary

Introduction

Northern Rocky Mountain Economic Development District (NRMEDD) is a designated Economic Development District (EDD) through the US Economic Development Administration (EDA). As the region’s EDD, NRMEDD is responsible for developing a Comprehensive Economic Development Strategy (CEDS) for the region defined as Gallatin and Park counties and is designed to identify regional priorities for economic and community development. This plan follows the new guidelines released by the US Economic Development Administration in February 2015. The CEDS is a strategy-driven plan developed by a diverse workgroup of local representatives from private, public, and nonprofit sectors.

The CEDS process began in January 2017 to ensure maximum input from the NRMEDD membership. This process engaged community leaders, leveraged the involvement of the private sector, and developed a strategic blueprint for regional collaboration. More than 60 people representing small businesses, city and county governments, and nonprofits were involved in various elements of the planning process. The five-year plan was completed in December of 2017.

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

The NRMEDD Strategy Committee, also known as our “Think Tank”, is established to serve as the oversight body for the Comprehensive Economic Development (CEDS) Strategy process. The composition of this committee is designed to conform to EDA guidelines, provide adequate geographic distribution and be representative of the District’s varied business sectors. The Strategy Committee must represent the main economic interests of the region, and must include Private Sector Representatives (defined in 13 C.F.R. § 300.3, with respect to any for-profit enterprise, as any senior management official or executive holding a key decision-making position, or that person’s designee). In addition, the Planning Organization should ensure that the Strategy Committee also includes:

- Public officials
- Community leaders
- Representatives of workforce development boards
- Representatives of institutions of higher education
- Minority and labor groups; and
- Private individuals
Executive Summary
Gallatin and Park Counties serve as southwest Montana’s economic hub. A variety of high-tech and professional service businesses, a robust tourism industry focused on Yellowstone National Park, and many large working farms and ranches provide an economic base that has become increasingly diverse over the past several decades. Montana State University brings over 16,400 students to the District as well as significant economic and cultural value, and the District’s residents are among the most educated in the state.

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

There are many organizations in Gallatin and Park counties that, for several years, have been successfully supporting economic development in the region. The District is building on and complementing that existing work by structuring complex economic development projects in two significant ways:

Building and filling in the gaps of economic development infrastructure – creating cooperation among programs, cooperation among economic assets (MRL, NWE, hospital, airport, MSU, industrial parks, available land, developers, retail centers, etc.).

Serving as the region’s targeted business recruitment organization, focusing on bringing large, global businesses to the region that will provide an increase in tax base and high-paying jobs, while simultaneously placing a very low infrastructure impact.

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

**Goal 1:** Promote economic diversity, entrepreneur growth, business retention and seek expansion of the regional economy through targeted business recruitment.

**Goal 2:** Foster effective transportation access and support development of major transportation assets including railroad, airport and highway systems.

**Goal 3:** Promote efforts to expand a skilled, highly educated, permanent, and full-time workforce to support local businesses.

**Goal 4:** Serve as a District-wide forum for coordinating economic development discussion and initiatives.
**Goal 5:** Build on the area’s unique natural assets to develop and enhance tourist industries.

**Goal 6:** Develop new housing solutions and housing units to address region-wide housing need.

**Goal 7:** Maintain and enhance physical infrastructure to make the region more competitive for economic development (in accordance with local government development priorities and capital improvement programs).

Considerable effort was made in this process to choose the strategies and priorities most likely to produce these outcomes and offering the best returns on investment of time, money, and staff resources. Priorities reflect the input provided by individual counties and communities in our region concerning their goals and concerns.

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

The Northern Rocky Mountain Economic Development District is a private, non-profit corporation (501c6), revived in 2012 to support economic development in Park and Gallatin counties. We represent a diverse area that includes the cities of Bozeman, Livingston, Belgrade, Manhattan, West Yellowstone, Three Forks, Gardiner, Wilsall, and many small towns and rural farming areas all with access to world renowned natural amenities. We offer a variety of economic development services, grant writing and administration, and targeted business recruitment and retention.

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

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

**Park County**

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

Additionally, the District will partner with Montana’s Economic Development Association (MEDA), to coordinate with other economic development districts throughout the state. With its low population, Montana’s economic development organizations often work closely together to address issues that help the state as a whole. Likewise, the District works closely with the Governor’s Office of Economic Development to ensure resources are coordinated in an efficient manner.
Map 2: Overview of the Northern Rocky Mountain Economic Development District
Gallatin and Park Counties serve as the gateway to Yellowstone National Park in Southwestern Montana. The region is southwest Montana’s economic hub, featuring a variety of high-tech and professional service businesses. The region is also home to a robust, year-round tourism industry focused on Yellowstone National Park and two nationally rated ski resorts as well as many large working farms and ranches. Montana State University brings over 16,400 students to the District as well as significant economic and cultural value, and the District’s residents are the most educated in the state, with over 48% of residents in Gallatin County holding bachelor degrees or higher in July of 2016. ¹

While only two counties are represented in the District, the counties make up a large and diverse land area. The District is approximately 5,416 square miles with an average of 22.3 persons per square mile. The population is not evenly distributed: Gallatin County has an average population density of 40.2 persons per square mile, while Park County had under six persons per square mile. ²

Gallatin County is Montana’s fourth largest county, with a 2016 population of 104,500, and is home to five incorporated cities and towns: Bozeman (the county seat and the state’s fourth largest city), Belgrade, Manhattan, Three Forks, and West Yellowstone. All but West Yellowstone are in the Gallatin Valley; West Yellowstone is located at the southern end of Gallatin County and serves as the western entrance to Yellowstone National park. Gallatin County boasts numerous National and State rankings. In July of 2017, the U.S. Census Bureau ranked Gallatin County #18 nationally for the rate of housing growth. ³ It is also ranked Gallatin County #24 nationally for population growth in 2015. ⁴ According to a new study released in July of 2017 by personal finance technology company Smart Asset, Gallatin County ranks 26th in the nation (#1 in the state) in terms of incoming investments. ⁵ According to research using the latest 2016 American Community Survey data, education rates in Gallatin County lead the state in numerous categories including highest percentage of people holding at least a high school education, and highest percentage of people holding at least a bachelor degree or better, lowest high school dropout rate. ⁶

Park County is home to the incorporated City of Livingston and the Town of Clyde Park, as well as the unincorporated communities of Cooke City, Emigrant, Gardiner, Silvergate, Springdale, and Wilsall. Most communities cluster near the Interstate 90 corridor in the north and entrances to Yellowstone National Park in the south. Park County is Montana’s 12th largest county, with a 2015 population of 15,972. Livingston, the seat of county government, is the state’s 12th largest city.

¹ https://www.census.gov/quickfacts/fact/table/gallatincountymontana/PST045216
² https://www.census.gov/quickfacts/fact/table/gallatincountymontana/PST045216
with a population of 7,245. Park County boasts 35% of their population over 25 holding at least a bachelor’s degree or higher. 7

The District boasts a high quality of life, world-class rivers, accessible public lands, a variety of parks and trails, and Yellowstone National Park, drawing both tourists and new residents to our outdoor lifestyle. Gallatin County had the highest population growth of any county in the state at 48.5%.

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

Population and Demographics

Gallatin County had a population of 104,500 in 2016, an increase of 48.5% from 2010. Bozeman, the county seat, has a 2015 population of 43,405, an increase of 15.5% since 2010. All incorporated cities and towns within Gallatin County saw population increase in the past decade.

Growth in Bozeman is increasing exponentially. NorthWestern Energy reports that new service hookups are nearly twice as large in Bozeman than any other major community in the state. As seen in the table below, Bozeman outpaced all other major cities more than 2 to 1 in Electric hookups so far in 2017 and nearly 10x any other major city except Missoula in new Gas connections.

**TABLE 1: NORTHWESTERN ENERGY NEW SERVICES SUMMARY - YEAR-TO-DATE JUNE 2017**

<table>
<thead>
<tr>
<th>Electric</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Butte</td>
<td>153</td>
</tr>
<tr>
<td>Great Falls</td>
<td>277</td>
</tr>
<tr>
<td>Billings</td>
<td>397</td>
</tr>
<tr>
<td>Bozeman</td>
<td>1,078</td>
</tr>
<tr>
<td>Helena</td>
<td>344</td>
</tr>
<tr>
<td>Missoula</td>
<td>460</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,709</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gas</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Butte</td>
<td>44</td>
</tr>
<tr>
<td>Great Falls</td>
<td>32</td>
</tr>
<tr>
<td>Billings</td>
<td>23</td>
</tr>
<tr>
<td>Bozeman</td>
<td>721</td>
</tr>
<tr>
<td>Helena</td>
<td>151</td>
</tr>
<tr>
<td>Missoula</td>
<td>577</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,548</strong></td>
</tr>
</tbody>
</table>

7 https://www.census.gov/quickfacts/fact/table/gallatincountymontana/PST045216
Park County had significantly less population growth: in 2015, the total population was 15,972, a 1.8% increase from 2000. Livingston, the county seat, had a 2014 population of 7,245, a 5.8% increase since 2000.  

CHART 1: POPULATION ESTIMATES, MONTANA, GALLATIN AND PARK COUNTIES 2010-2015


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### TABLE 2: ETHNICITY DEMOGRAPHICS, (2010-2014 ACS DATA)

<table>
<thead>
<tr>
<th>RACE</th>
<th>UNITED STATES +/- MARGIN OF ERROR</th>
<th>MONTANA +/- MARGIN OF ERROR</th>
<th>GALLATIN COUNTY +/- MARGIN OF ERROR</th>
<th>PARK COUNTY +/- MARGIN OF ERROR</th>
</tr>
</thead>
<tbody>
<tr>
<td>White Non-Hispanic</td>
<td>73.8% (+/-0.1%)</td>
<td>89.4% (+/-0.1%)</td>
<td>95.2% (+/-0.2%)</td>
<td>96.3% (+/-0.4%)</td>
</tr>
<tr>
<td>Black or African American</td>
<td>12.6% (+/-0.1%)</td>
<td>0.5% (+/-0.1%)</td>
<td>0.3% (+/-0.1%)</td>
<td>0.2% (+/-0.2%)</td>
</tr>
<tr>
<td>Hispanic or Latino (of any race)</td>
<td>16.9% (+/-0.1%)</td>
<td>3.2% (+/-0.1%)</td>
<td>2.9%*</td>
<td>2.4%*</td>
</tr>
<tr>
<td>American Indian &amp; Alaskan Native</td>
<td>0.8% (+/-0.1%)</td>
<td>6.5% (+/-0.1%)</td>
<td>1.0% (+/-0.2%)</td>
<td>0.8% (+/-0.4%)</td>
</tr>
<tr>
<td>Native Hawaiian and Other Pacific Islander</td>
<td>0.2% (+/-0.1%)</td>
<td>0.1% (+/-0.1%)</td>
<td>0.1% (+/-0.1%)</td>
<td>0.0% (+/-0.1%)</td>
</tr>
<tr>
<td>Asian</td>
<td>5.0% (+/-0.1%)</td>
<td>0.7% (+/-0.1%)</td>
<td>1.1% (+/-0.2%)</td>
<td>1.0% (+/-0.1%)</td>
</tr>
<tr>
<td>Two or more races</td>
<td>2.9% (+/-0.1%)</td>
<td>2.5% (+/-0.1%)</td>
<td>2.1% (+/-0.3%)</td>
<td>2.5% (+/-0.5%)</td>
</tr>
</tbody>
</table>


### Distribution of Population by Age, 2015

Because of the impact of Montana State University, Gallatin County’s population, when distributed by age range, has a relatively young population compared to the state of Montana: Overall, the projected shifts in Gallatin County largely correspond with state wide trends. The composition of the population in terms of age group is expected to shift most significantly in the 65 and over category. If projections hold true, the proportion of older residents aged 65 years and over will nearly triple, from 9.5 percent of the total population in 2010 to 25.1 percent in 2060. There will be a corresponding decrease in that time frame for the younger age cohorts: from 17.6 percent to 15.1 percent for those under 15, from 19.4 percent to 13.6 percent for those 15 to 24, and from 53.5 percent to 46.2 percent for those 25 to 64 years old. Census data released in 2016 ranks Bozeman No. 1 in the nation for micropolitan area population growth from July 1, 2014 to July 1, 2015. All of Gallatin County is considered the Bozeman micropolitan area. The area’s estimated population grew from 97,276 people to 104,500 people, or approximately 6%.9

The projected shifts in Park County fluctuate more than the state-wide trends. If projections hold true, the proportion of older residents aged 65 years and over will increase overall from 16.7 percent of the total population in 2010 to 24.6 percent in 2060. There will be a corresponding decrease in that time frame for two of the younger age cohorts: from 16.1

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percent to 15.4 percent for those under 15, and from 58.5 percent to 51.0 percent for those 25 to 64 years old. However, there is projected to be a slight increase for those 15 to 24, from 8.6 percent to 9.0 percent.

**TABLE 3: AGE DEMOGRAPHICS – GALLATIN COUNTY, (2010-2014 ACS DATA)**

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>MEDIAN AGE (+/- MARGIN OF ERROR)</th>
<th>UNDER 5 YEARS (+/- MARGIN OF ERROR)</th>
<th>18 OVER (+/- MARGIN OF ERROR)</th>
<th>65 AND OVER (+/- MARGIN OF ERROR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>37.4 (+/-0.1 years)</td>
<td>19,973,711 (+/-3,721)</td>
<td>240,329,426 (+/- 6,833)</td>
<td>43,177,961 (+/-4,698)</td>
</tr>
<tr>
<td>Montana</td>
<td>39.8 (+/-0.1 years)</td>
<td>61,102 (+/-326)</td>
<td>782,701 (+/-299)</td>
<td>158,184 (+/-286)</td>
</tr>
<tr>
<td>Gallatin County</td>
<td>33.0 (+/-0.2 years)</td>
<td>5,714 (+/-49)</td>
<td>72,821 (+/-n/a)</td>
<td>9,625 (+/-83)</td>
</tr>
<tr>
<td>Belgrade</td>
<td>31.2 (+/-2.3 years)</td>
<td>530 (+/-188)</td>
<td>5,446 (+/-239)</td>
<td>454 (+/-80)</td>
</tr>
<tr>
<td>Big Sky</td>
<td>33.8 (+/-3.4 years)</td>
<td>217 (+/-78)</td>
<td>2,178 (+/-299)</td>
<td>211 (+/-94)</td>
</tr>
<tr>
<td>Bozeman</td>
<td>27.5 (+/-0.6 years)</td>
<td>1,994 (+/-269)</td>
<td>33,323 (+/-312)</td>
<td>3,155 (+/-232)</td>
</tr>
<tr>
<td>Manhattan</td>
<td>44.2 (+/-5.3 years)</td>
<td>99 (+/-59)</td>
<td>991 (+/-141)</td>
<td>212 (+/-63)</td>
</tr>
<tr>
<td>Three Forks</td>
<td>46.2 (+/-9.8 years)</td>
<td>65 (+/-35)</td>
<td>1,450 (+/-142)</td>
<td>427 (+/-99)</td>
</tr>
<tr>
<td>West Yellowstone</td>
<td>37.1 (+/-10.8 years)</td>
<td>108 (+/-69)</td>
<td>1,121 (+/-231)</td>
<td>160 (+/-69)</td>
</tr>
</tbody>
</table>

**TABLE 4: AGE DEMOGRAPHICS – PARK COUNTY, (2010-2014 ACS DATA)**

<table>
<thead>
<tr>
<th>Location</th>
<th>Median Age (+/- Margin of Error)</th>
<th>Under 5 Years (+/- Margin of Error)</th>
<th>18 Over (+/- Margin of Error)</th>
<th>65 and Over (+/- Margin of Error)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>37.4 (+/-0.1 years)</td>
<td>19,973,711 (+/-3,721)</td>
<td>240,329,426 (+/- 6,833)</td>
<td>43,177,961 (+/-4,698)</td>
</tr>
<tr>
<td>Montana</td>
<td>39.8 (+/-0.1 years)</td>
<td>61,102 (+/-326)</td>
<td>782,701 (+/-299)</td>
<td>158,184 (+/-286)</td>
</tr>
<tr>
<td>Park County</td>
<td>46.3 (+/-0.5 years)</td>
<td>792 (+/-48)</td>
<td>12,636 (+/-n/a)</td>
<td>2820 (+/-50)</td>
</tr>
<tr>
<td>Clyde Park</td>
<td>47.5 (+/-19.2 years)</td>
<td>15 (+/-11)</td>
<td>207 (+/-69)</td>
<td>49 (+/-27)</td>
</tr>
<tr>
<td>Cooke City</td>
<td>52.2 (+/-12.1 years)</td>
<td>0 (+/-10)</td>
<td>21 (+/-14)</td>
<td>0 (+/-10)</td>
</tr>
<tr>
<td>Gardiner</td>
<td>46.3 (+/-8.9 years)</td>
<td>62 (+/-52)</td>
<td>923 (+/-162)</td>
<td>133 (+/-50)</td>
</tr>
<tr>
<td>Livingston</td>
<td>40.8 (+/-3.2 years)</td>
<td>511 (+/-105)</td>
<td>5,674 (+/-148)</td>
<td>1,257 (+/-189)</td>
</tr>
<tr>
<td>Wilsall</td>
<td>60.7 (+/-9.9 years)</td>
<td>14 (+/-19)</td>
<td>88 (+/-30)</td>
<td>39 (+/-21)</td>
</tr>
</tbody>
</table>

**CHART 2: EMPLOYMENT BY INDUSTRY SECTOR - GALLATIN COUNTY, 2015**

CHART 3: EMPLOYMENT BY INDUSTRY SECTOR - PARK COUNTY, 2015

Largest Private Employers

The following tables list the 20 largest private sector employers in Gallatin County and the 10 largest private sector employers in Park County, according to the most current statistics available.

**TABLE 5: LARGEST PRIVATE SECTOR EMPLOYERS – GALLATIN COUNTY, 2015**

<table>
<thead>
<tr>
<th>PRIVATE SECTOR EMPLOYERS</th>
<th>NUMBER OF EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bozeman Health Deaconess Hospital</td>
<td>1000+</td>
</tr>
<tr>
<td>Oracle America</td>
<td>250-499</td>
</tr>
<tr>
<td>Town Pump</td>
<td>250-499</td>
</tr>
<tr>
<td>Wal Mart</td>
<td>250-499</td>
</tr>
<tr>
<td>Albertson’s</td>
<td>100-249</td>
</tr>
<tr>
<td>Bridger Bowl</td>
<td>100-249</td>
</tr>
<tr>
<td>Community Food Co-Op</td>
<td>100-249</td>
</tr>
<tr>
<td>Costco</td>
<td>100-249</td>
</tr>
<tr>
<td>Federal Premium Ammunition</td>
<td>100-249</td>
</tr>
<tr>
<td>First Student</td>
<td>100-249</td>
</tr>
<tr>
<td>JC Billion</td>
<td>100-249</td>
</tr>
<tr>
<td>Kenyon Noble Lumber &amp; Hardware</td>
<td>100-249</td>
</tr>
<tr>
<td>Korman Marketing Group</td>
<td>100-249</td>
</tr>
<tr>
<td>Martel Construction</td>
<td>100-249</td>
</tr>
<tr>
<td>McDonald’s</td>
<td>100-249</td>
</tr>
<tr>
<td>Murdoch’s Ranch &amp; Home Supply</td>
<td>100-249</td>
</tr>
<tr>
<td>Ressler Motors</td>
<td>100-249</td>
</tr>
<tr>
<td>Rosauer’s Super Markets</td>
<td>100-249</td>
</tr>
<tr>
<td>Target</td>
<td>100-249</td>
</tr>
<tr>
<td>Town &amp; Country Foods</td>
<td>100-249</td>
</tr>
<tr>
<td>Zoot Enterprises</td>
<td>100-249</td>
</tr>
</tbody>
</table>


**TABLE 6: LARGEST PRIVATE SECTOR EMPLOYERS – PARK COUNTY, 2015**

<table>
<thead>
<tr>
<th>PRIVATE SECTOR EMPLOYERS</th>
<th>NUMBER OF EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Livingston HealthCare</td>
<td>250-499</td>
</tr>
<tr>
<td>Chico Hot Springs</td>
<td>100-249</td>
</tr>
<tr>
<td>Church Universal &amp; Triumphant</td>
<td>100-249</td>
</tr>
<tr>
<td>PrintingForLess.com</td>
<td>100-249</td>
</tr>
<tr>
<td>Albertson’s</td>
<td>50-99</td>
</tr>
<tr>
<td>Montana’s Rib &amp; Chop House</td>
<td>50-99</td>
</tr>
<tr>
<td>R-Y Timber</td>
<td>50-99</td>
</tr>
<tr>
<td>The Murray Hotel</td>
<td>50-99</td>
</tr>
<tr>
<td>Town &amp; Country Foods</td>
<td>50-99</td>
</tr>
</tbody>
</table>

CHART 4: AVERAGE ANNUAL PAY BY INDUSTRY- GALLATIN COUNTY, 2015

INDUSTRY

CHART 5: AVERAGE ANNUAL PAY BY INDUSTRY-PARK COUNTY, 2015

INDUSTRY
**CHART 6: PER CAPITA PERSONAL INCOME & AVERAGE EARNINGS PER JOB – GALLATIN COUNTY 2000-2015**


**CHART 7: PER CAPITA PERSONAL INCOME & AVERAGE EARNINGS PER JOB – PARK COUNTY 2000-2015**

The table below includes the top five ranking counties with the lowest unemployment rates in Montana, as well as Park County. As of the latest available preliminary estimates, Gallatin County was tied for the 5th lowest unemployment rate in the state and was by far the most populous county to be ranked in the top ten. Meanwhile, Park County’s unemployment rate ranked 31st. Estimated populations for each county are provided for the sake of context.

**TABLE 7: COUNTY UNEMPLOYMENT RATE COMPARISON, OCTOBER 2016**
*(In rank order, not-seasonally adjusted)*

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>2015 POPULATION</th>
<th>OCTOBER RATE</th>
<th>2015 RATE</th>
<th>OCTOBER RATE*</th>
<th>2016 RATE</th>
<th>OCTOBER 2016 RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daniels</td>
<td>1,760</td>
<td>2.8</td>
<td>2.4</td>
<td>1 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>McCones</td>
<td>1,683</td>
<td>1.8</td>
<td>2.4</td>
<td>1 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Powder River</td>
<td>1,773</td>
<td>2.4</td>
<td>2.4</td>
<td>1 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carter</td>
<td>1,180</td>
<td>2.4</td>
<td>2.5</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beaverhead</td>
<td>9,300</td>
<td>3.0</td>
<td>3.0</td>
<td>5 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gallatin</td>
<td>100,739</td>
<td>3.0</td>
<td>3.0</td>
<td>5 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Garfield</td>
<td>1,314</td>
<td>2.5</td>
<td>3.0</td>
<td>5 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Judith Basin</td>
<td>1,926</td>
<td>2.8</td>
<td>3.0</td>
<td>5 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Valley</td>
<td>7,659</td>
<td>2.6</td>
<td>3.0</td>
<td>5 Tied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Park</td>
<td>15,972</td>
<td>4.7</td>
<td>3.9</td>
<td>31</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### TABLE 8: 2015 ANNUAL AVERAGE WAGES BY INDUSTRY SECTOR

<table>
<thead>
<tr>
<th>NAICS</th>
<th>Industry Sector</th>
<th>United States Average Wage 2015</th>
<th>Gallatin County Average Wage 2015</th>
<th>Mesa County, CO (City of Grand Junction) Average Wage 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>55</td>
<td>Management of Companies &amp; Enterprises</td>
<td>$116,745</td>
<td>$60,078</td>
<td>$101,797</td>
</tr>
<tr>
<td>51</td>
<td>Information</td>
<td>$95,038</td>
<td>$56,541</td>
<td>$44,836</td>
</tr>
<tr>
<td>54</td>
<td>Professional, Scientific, &amp; Technical Services</td>
<td>$89,785</td>
<td>$66,648</td>
<td>$53,640</td>
</tr>
<tr>
<td>42</td>
<td>Wholesale Trade</td>
<td>$73,363</td>
<td>$56,074</td>
<td>$55,629</td>
</tr>
<tr>
<td>31-33</td>
<td>Manufacturing</td>
<td>$64,305</td>
<td>$41,516</td>
<td>$43,293</td>
</tr>
<tr>
<td>23</td>
<td>Construction</td>
<td>$57,009</td>
<td>$46,908</td>
<td>$49,377</td>
</tr>
<tr>
<td>61</td>
<td>Education Services</td>
<td>$47,968</td>
<td>$25,908</td>
<td>$21,404</td>
</tr>
<tr>
<td>62</td>
<td>Health Care &amp; Social Assistance</td>
<td>$47,296</td>
<td>$44,891</td>
<td>$45,897</td>
</tr>
<tr>
<td>71</td>
<td>Arts, Entertainment, Recreation</td>
<td>$36,128</td>
<td>$25,840</td>
<td>$16,454</td>
</tr>
<tr>
<td>44-45</td>
<td>Retail Trade</td>
<td>$29,742</td>
<td>$29,319</td>
<td>$27,194</td>
</tr>
<tr>
<td>72</td>
<td>Accommodation &amp; Food Services</td>
<td>$19,415</td>
<td>$18,307</td>
<td>$16,888</td>
</tr>
</tbody>
</table>


The lower average wages in Gallatin County are further impacted by the higher cost of living in Bozeman as compared to similar communities as identified in the following table. As an example, Grand Junction, CO with a similar size population as Bozeman has similar average wages as indicated in Table 7. However Grand Junction has a lower Cost of Living Index score as identified in Table 8, which provides more purchasing power with the wages. The composite Cost of Living Index score is based on six categories – housing, utilities, grocery items, transportation, health care, and miscellaneous goods and services. The national average composite index is set at 100 each period; so the index conveys relative price levels at a specific point in time.
TABLE 9: COST OF LIVING INDEX RESULTS (Q2 2016)

<table>
<thead>
<tr>
<th>CITY</th>
<th>COMPOSITE SCORE</th>
<th>GROceries</th>
<th>HOUSING</th>
<th>UTILITIES</th>
<th>TRANSPORTATION</th>
<th>HEALTH CARE</th>
<th>MISC. GOODS &amp; SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAN FRANCISCO, CA</td>
<td>174.7</td>
<td>130.8</td>
<td>310.7</td>
<td>107.5</td>
<td>135.6</td>
<td>118.4</td>
<td>118.1</td>
</tr>
<tr>
<td>GRAND JUNCTION, CO</td>
<td>94.9</td>
<td>100.4</td>
<td>90.9</td>
<td>93.9</td>
<td>99.3</td>
<td>99.5</td>
<td>94.2</td>
</tr>
<tr>
<td>BOISE, ID</td>
<td>89.7</td>
<td>88.7</td>
<td>78.8</td>
<td>83.5</td>
<td>108.0</td>
<td>105.5</td>
<td>92.9</td>
</tr>
<tr>
<td>BOZEMAN, MT</td>
<td>99.6</td>
<td>97.9</td>
<td>106.6</td>
<td>97.5</td>
<td>95.4</td>
<td>103.9</td>
<td>95.7</td>
</tr>
<tr>
<td>MANHATTAN, NY</td>
<td>226.0</td>
<td>128.6</td>
<td>453.7</td>
<td>129.9</td>
<td>130.0</td>
<td>114.8</td>
<td>148.6</td>
</tr>
<tr>
<td>Most expensive, Q2 2016</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PORTLAND, OR</td>
<td>125.6</td>
<td>111.2</td>
<td>169.0</td>
<td>72.8</td>
<td>104.3</td>
<td>107.2</td>
<td>120.6</td>
</tr>
<tr>
<td>PIERRE, SD</td>
<td>102.8</td>
<td>97.9</td>
<td>120.1</td>
<td>98.9</td>
<td>93.8</td>
<td>94.7</td>
<td>95.3</td>
</tr>
<tr>
<td>MCALLEN, TX</td>
<td>75.9</td>
<td>81.7</td>
<td>65.0</td>
<td>89.3</td>
<td>82.9</td>
<td>76.4</td>
<td>76.2</td>
</tr>
<tr>
<td>Least expensive, Q2 2016</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CEDAR CITY, UT</td>
<td>88.2</td>
<td>92.7</td>
<td>76.3</td>
<td>88.0</td>
<td>102.1</td>
<td>83.9</td>
<td>92.4</td>
</tr>
<tr>
<td>OLYMPIA, WA</td>
<td>102.0</td>
<td>109.9</td>
<td>96.1</td>
<td>108.2</td>
<td>116.7</td>
<td>116.4</td>
<td>94.9</td>
</tr>
<tr>
<td>LARAMIE, WY</td>
<td>90.9</td>
<td>100.4</td>
<td>81.9</td>
<td>97.8</td>
<td>95.6</td>
<td>100.2</td>
<td>89.9</td>
</tr>
</tbody>
</table>

The national average composite index is set at 100 each collection period. The index conveys relative price levels at a specific point in time and the index score can be seen as a percentage of the average for all places. The index does not measure inflation (price change over time).

Talent

As noted in the Bozeman Economic Development Strategy Update in November 2016, “The national economy is becoming increasingly more talent/knowledge-based than resource-based meaning people over raw materials are the most important asset to a company’s value and prospects for growth. This applies to all industries including manufacturing, professional services, and technology. Articulating this further is the following chart defining the shift in market assessment for the world’s most valuable companies. As illustrated in figure 1, 10 years ago the most valuable companies consisted largely of natural resource extraction and now they are largely technology companies with values based upon people generating innovative ideas and processes. This is not to suggest that Bozeman needs to focus their industrial base entirely on technology companies, but to understand that the modern economy thrives more on skilled people than natural resource extraction.”
Figure 1: The Age of Tech

<table>
<thead>
<tr>
<th>Company</th>
<th>Market Capitalization 2006</th>
<th>2016*</th>
</tr>
</thead>
<tbody>
<tr>
<td>ExxonMobil</td>
<td>$362.5b</td>
<td>$571.4b</td>
</tr>
<tr>
<td>General Electric</td>
<td>$348.5b</td>
<td>$530.6b</td>
</tr>
<tr>
<td>Microsoft</td>
<td>$279.0b</td>
<td>$445.5b</td>
</tr>
<tr>
<td>Citigroup</td>
<td>$230.9b</td>
<td>$362.4b</td>
</tr>
<tr>
<td>BP</td>
<td>$225.9b</td>
<td>$356.0b</td>
</tr>
<tr>
<td>Royal Dutch Shell</td>
<td>$203.5b</td>
<td>$355.6b</td>
</tr>
</tbody>
</table>

* as of August 1, 2016

Sources: Yahoo! Finance, Forbes
Also noted in the Bozeman Economic Development Strategy Update in November 2016, “A significant cohort of the talent in demand consists of the “Millennial” generation (generally ages 19 to 35 in 2016) made up of approximately 76 million people – the largest demographic group our country has seen. As this generation grows and shapes our talent-based economy, it is important to understand what motivates them and the communities they choose in such a highly mobile environment. Such an environment includes the following elements:

Job Base. Talent moving to a new community wants to know that there are other opportunities if the job that brought them there does not fulfill expectations.

Simple Commute. Many Millennials are not defined by the automobile, and do not want to drive if they don’t have to. As reported in Urban Land Institute (ULI) Emerging Trends 2016, miles traveled by car for those people 34 years old or younger are down 23 percent nationally. Locally, the average miles travelled by any mode – walking, driving, biking, or taking transit – is the lowest for Millennials.

Urban Lifestyle. They tend to prefer density with alternative transportation modes and retail nearby, which provides alternatives to owning a car. This urban lifestyle does not mean that an entire community must conform to urban densities. What is important is that some element of an urban lifestyle through either a healthy Main Street in a traditional downtown or denser town centers in suburbs is provided.

Amenities. Millennials are looking for ample amenities, especially restaurants and access to outdoor recreation.

Open Culture. They embrace social or ethical causes and communities that are more diverse, accepting, and open to change.”

II. SWOT Analysis
The District’s 2017 CEDS process has taken approximately 12 months. It began in earnest in December 2016 with submission and approval of the District’s work plan to EDA. The Strategy Committee was formed a month later and first convened in January 2017. Data gathering began in January 2017.

The District primarily employed a “Strength, Weakness, Opportunities, and Threats” (SWOT) inquiry to assess community needs and desires. Between July and August 2017, the following events were held:

August 30, 2017: Manhattan CEDS Sensing Session.
August 31, 2017: Belgrade CEDS Sensing Session.
September 21, 2017: Park County CEDS Sensing Session.

Over the course of the past 12 months, the District identified the following economic sectors and clusters present and active in the local economy:
Overall, approximately 62 individuals participated in the CEDS process through public meetings, individual surveys, serving on the Strategy Committee, or directly helping with data gathering. The input from these public forums has been used to draft the vision, goals, and projects of the 2017 CEDS.

The last several years have seen dramatic change in the economy of Gallatin and Park counties. While the first part of the decade saw a significant decline in the economy and development, there has been a steady rise in recent years for growth, building, and development. As an example, housing permits in the city of Bozeman paints a powerful picture: 84% of the decade’s homes were permitted or built between 2001 and 2007; permits dropped precipitously afterward, with only 3% of the decade’s total being permitted by 2011. Since then, Gallatin County has seen another major rise in the permit application numbers. The state’s construction industry is set to grow the fastest of any industry in Montana, at 2.7 percent annually.10

More than 80% of the job growth in the past decade came in the “services” sector. A significant portion of the services sector include professional services such as architects, attorneys, engineers, finance and real estate, insurance, and similar services – many of which are associated with the growth and development industry.

While the District’s economy was impacted by the recession, the area still retains remarkable and unique assets. Gallatin County is a gateway to Yellowstone National Park and, with two world-

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renowned ski resorts, Montana State University, excellent regional health care, and spectacular outdoor recreation, remains a highly desirable to live, work, and raise a family. The number of construction firms and number of those employed in the construction industry has continued to increase in recent years in both Gallatin and Park counties. In Gallatin County, 2015 was the first year that the number of firms reached levels last seen in 2009. However, the number of those employed in the industry has not yet reached the employment figures observed from 2005 to 2009 in either Gallatin County or Park County. \(^\text{11}\)

In 2016, spending on public cloud infrastructure as a service hardware and software is forecast to reach $38 billion, growing to $173 billion in 2026. SaaS and Platform as a Service (PaaS) portion of cloud hardware and infrastructure software spending is projected to reach $12 billion in 2016, growing to $55 billion in 2026.\(^\text{12}\) Trends driving the market growth include geographic expansion, industry customization, developer focus, expanding professional and managed services, and enhanced security, governance, and compliance.

The Montana High-Tech Business Alliance (HTBA) includes software companies as well as high-tech manufacturers. The HTBA 2016 Member Survey indicates that Montana’s high-tech companies anticipate growing almost seven times faster than the Montana economy as a whole. HTBA members (23 percent of all responses) most often reported that attracting talent and hiring skilled technology workers was their firm’s largest impediment to growth.\(^\text{13}\)

In 2017, several meetings were held throughout the District to discuss the strengths, weaknesses, opportunities, and threats. Additionally, dozens of individual surveys were collected to round out the public meetings. The following summarizes the findings of that process.

During this process, the NRMEDD partnered with a variety of local entities, including Gallatin County, Park County, the City of Bozeman, the City of Belgrade, the Town of Manhattan, the City of Three Forks, the Montana Economic Developers Association, and the Montana State University Local Government Center to host events and analyze information. The NRMEDD 2017 CEDS data collection process included public meetings and workshops sponsored by the NRMEDD in the outlying communities of West Yellowstone, Three Forks, Manhattan, Belgrade, and Park County. We also utilized the Bozeman SWOT analysis conducted by the City of Bozeman Economic Development office, directed by Brit Fontenot. The process of gathering community-input was managed using a SWOT-analysis model. SWOT provides the structure to identify internal and external factors necessary to achieve an objective and the findings are categorized as either favorable or unfavorable.

- **Strengths (Internal):** attributes favorable to achieving the objective.
- **Weaknesses (Internal):** attributes unfavorable to achieving the objective
- **Opportunities (External):** favorable external factors


\(^{\text{12}}\) Statistica: Public cloud Infrastructure as a Service (IaaS) hardware and software spending from 2015 to 2026, by segment (in billion U.S. dollars).

\(^{\text{13}}\) Bozeman Economic Development Strategy Update November 2016
Threats (External): unfavorable external factors that could prevent achieving an objective.

Community input involved local citizens who participated in open meetings, workshops and online surveys. In total, the local meetings were attended by more than 50 businesses.

Additionally, strengths, weaknesses, opportunities, and threats were also assessed by a review of local and regional planning documents. In brief, the following documents were used to form the SWOT analysis below:

- Available Capital Improvement Plans for Gallatin County, Park County, the City of Livingston, the City of Bozeman; the Town of West Yellowstone, the Town of Three Forks, the Town of Manhattan, and the City of Belgrade.
- Growth Policies (comprehensive plans) for both counties as well as the City of Bozeman, the City of Livingston, the City of Belgrade, and the Town of Manhattan;
- Transportation Plans for the City of Bozeman, the Town of Manhattan, the Greater Bozeman Area Transportation Planning Jurisdiction, the
- Workforce Needs Analysis for the greater Bozeman Area;
- Impact Fee studies for the Cities of Bozeman and Belgrade as well as the community of Big Sky; The previous CEDS documents for both Park and Gallatin Counties;
- The City of Bozeman Affordable Action Plan;
- The City of Bozeman Economic Development Plan; Montana Business Quarterly;
- Gallatin and Park County Hazard Mitigation Plans;
- Montana State University Draft Five Year Strategic Plan 2013-2018; Montana State University Economic Impact Report; (Updated 2016)
- Montana Economic Developer’s Association Resource Team assessments for Belgrade and Livingston;
- Montana Department of Labor Economic Profiles for both Gallatin and Park Counties; Prospera Business Network’s Economic Profile of both Gallatin and Park Counties; Montana Department of Transportation Aviation Division’s State Aviation Systems Plan;
- University of Montana’s Institute for Tourism Research, The Economic Review of Tourism in Montana

Strengths / Opportunities

Gallatin and Park Counties have a remarkable set of assets. Fantastic recreation opportunities, high-quality educational systems, and small-town atmosphere make for a spectacular quality of life. Proximity to Yellowstone National Park, as well as world-class skiing and trout streams, provides an enviable quality of life for residents as well as a strong tourism industry. The small-town atmosphere of the District’s cities and towns provide a wonderful place to live, work, and raise a family. Generally, the SWOT analysis incorporated common themes:
<table>
<thead>
<tr>
<th>Strengths (Internal)</th>
<th>Weaknesses (Internal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spectacular Natural Setting</td>
<td>Housing and Construction</td>
</tr>
<tr>
<td>Montana State University</td>
<td>Health Care availability</td>
</tr>
<tr>
<td>Educational Opportunities</td>
<td>Energy Costs</td>
</tr>
<tr>
<td>Highly Educated Workforce</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>Skilled Workforce</td>
<td>Transportation</td>
</tr>
<tr>
<td>Regional Retail Economic Hub</td>
<td>Program Support for Quality of Life/Arts and Culture</td>
</tr>
<tr>
<td>Access to Transportation</td>
<td>Finance and Business Start-up Resources</td>
</tr>
<tr>
<td>The Arts and Culture</td>
<td>Lack of entertainment and Restaurants</td>
</tr>
<tr>
<td>Tourism</td>
<td></td>
</tr>
<tr>
<td>Forward-Thinking and Accessible Local Government</td>
<td></td>
</tr>
<tr>
<td>Thriving Town Centers</td>
<td></td>
</tr>
<tr>
<td>Nonprofits, volunteer opportunities, and philanthropy</td>
<td></td>
</tr>
<tr>
<td>Access to world-class Healthcare facilities</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities (External)</th>
<th>Threats (External)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thriving Technology and Biotechnology Sector</td>
<td>Ability to fund and build new schools</td>
</tr>
<tr>
<td>Entrepreneur Growth Programs</td>
<td>Public safety not keeping up with growth</td>
</tr>
<tr>
<td>Clusters</td>
<td>Lack of water</td>
</tr>
<tr>
<td>Housing and Construction</td>
<td>Crime</td>
</tr>
<tr>
<td>Affordable Workforce Housing</td>
<td>Lack of commercial funding to keep up with residential growth</td>
</tr>
<tr>
<td></td>
<td>Tax increases to cover cost of increased services</td>
</tr>
<tr>
<td></td>
<td>Lack of community connective-ness</td>
</tr>
<tr>
<td></td>
<td>Online sales overtaking local retailers.</td>
</tr>
</tbody>
</table>
The City of Bozeman formulated a SWOT analysis derived from stakeholder input, survey responses, and general research. Below is the analysis conducted by the City of Bozeman Economic Development office. Bozeman Strengths, Weaknesses, Opportunities, and Challenges (SWOT). The following strengths, weaknesses, opportunities, and threats (SWOT) are derived from stakeholder input, survey responses, and general research.\(^\text{14}\)

<table>
<thead>
<tr>
<th>Strength (internal)</th>
<th>Weakness (internal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>High-wage and knowledge-based industry clusters</td>
<td>Limited affordable housing</td>
</tr>
<tr>
<td>MSU and Gallatin College programs and increasing enrollment in both</td>
<td>Low salaries (also a strength for business)</td>
</tr>
<tr>
<td>Bozeman Yellowstone International Airport</td>
<td>Limited rail freight loading</td>
</tr>
<tr>
<td>Outdoor recreation opportunities</td>
<td>Isolated location</td>
</tr>
<tr>
<td>Vibrant downtown</td>
<td>Lack of cultural diversity</td>
</tr>
<tr>
<td>High net-worth population</td>
<td>Limited access to venture capital and startup ecosystem</td>
</tr>
<tr>
<td>Small-town feel</td>
<td>Hard to attract senior level talent</td>
</tr>
<tr>
<td>Strong K-12 system</td>
<td>City permitting process perceived as difficult</td>
</tr>
<tr>
<td>Sustainable culture</td>
<td>Broadband infrastructure</td>
</tr>
<tr>
<td>Regional retail hub (important for talent attraction)</td>
<td>Limited site availability for business expansion</td>
</tr>
<tr>
<td>I-90 access</td>
<td>Lack of activities to support youth programs, especially teenagers</td>
</tr>
<tr>
<td>City has great GIS data sharing and culture</td>
<td>Lack of larger conference/convention facility</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunity (external)</th>
<th>Threat (external)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellowstone National Park tourist attraction</td>
<td>Limited STEM education workforce</td>
</tr>
<tr>
<td>Big Sky Resort business leader attraction</td>
<td>State dependence on energy economic base</td>
</tr>
<tr>
<td>Millennial talent pool is mobile and seeks quality location</td>
<td>Increase in fuel prices</td>
</tr>
<tr>
<td>Population growth in mountain states</td>
<td></td>
</tr>
<tr>
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\(^{14}\) Bozeman Economic Development Strategy Update November 2016
During the meetings held throughout the District to discuss the strengths, weaknesses, opportunities, and threats, the following topics were repeated in a majority of, if not every meeting. Additionally, dozens of individual surveys were collected to round out the public meetings. The following summarizes the findings of that process.

**A Spectacular Natural Setting**

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

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

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

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

**Skilled Workforce**

When planning for a future economy it is important to understand that all industries are dependent on a talented workforce that has technical skills and/or higher education attainment. Bozeman’s future economy requires a skilled workforce with training in career technical education (CTE) and access to higher education science, technology, engineering, and mathematics (STEM) degrees.

**A Thriving Technology and Biotechnology Sector**

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

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

**Regional Retail Economic Hub**

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

**Access to Transportation**

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

**The Arts and Culture**

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

Tourism

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

The tourism industry cluster consists of a very wide range of businesses that benefit from travelers. Buses, automobiles, airlines, rail, and other transportation companies bring travelers into an economic region. These consumers in turn purchase products and services offered by local lodging establishments, restaurants, amusement, recreational and entertainment establishments, and general retail outlets. This process creates many employment and business opportunities, all of which help sustain and expand the local economy.15

This industry cluster is supported by numerous local sector businesses including hotels, restaurants, tour guides, and retailers.

In 2015, Yellowstone National Park experienced record visitation. One reason is that this iconic national park is a draw for many international visitors. Pair that with reduced visa requirements in China, for example, and there is a sudden boom. Nationally, the number of visitors from China to the U.S. currently ranks as the 7th highest visitor group. By 2020, Chinese visitors are expected to be one of the largest groups of visitors to the U.S.9 This trend is reflected in the National Park Service recent addition of Mandarin speaking translators at the Park.16

Forward-Thinking and Accessible Local Government

Even with the population growth of recent years, local governments in the District remain accessible. Most of the communities within the District have Capital Improvement Plans (CIPs) to guide future investment and development, and a number of partnerships have developed between various local governments as well as with partners such as Bozeman Deaconess Hospital and Montana State University. Both the

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City of Bozeman and Park County have appointed local Economic Development Boards, and the City of Bozeman has an adopted Economic Development Plan.

**Thriving Town Centers**

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

**Nonprofits, volunteer opportunities, and philanthropy**

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

**Healthcare**

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

**Opportunities for Entrepreneur Growth Programs**

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

**Industry Clusters**

Industry clusters are groups of similar and related traded sector businesses in a defined geographic area that share common markets, technologies, worker skill needs, and which are often linked by buyer-seller relationships. Industry clusters represent distinct qualities of a community and help define what makes one community different from another. As they convey distinct qualities, it is important to be specific in the definition of a cluster. For example, rather than promoting “high-tech,” a community should focus on “software or photonics” to convey the type of product being manufactured and its unique workforce and supply chain needs. Promotion of clusters helps reinforce to existing businesses and interested outside talent the unique community assets and why it is good place to stay and grow. When interviewed, business leaders agreed with this approach in that it helps convey an understanding of the distinct industry assets in the
region. The District has identified the following key industry clusters it can support and grow:

- Photonics
- Software/IT
- Outdoor
- Tourism/Recreation
- Biotechnology

Each cluster benefits from partnership with the significant higher education assets of Montana universities and colleges. In defining specific clusters and fostering collaboration, new business opportunities arise, workforce training needs can be met, and physical site expansion needs can be addressed.\(^{17}\)

**Transportation**

The Bozeman Airport Terminal welcomes visitors with crackling fireplaces and snow-capped mountain ranges framed in sprawling windows. Their beautiful state-of-the-art facility is home to a variety of amenities to ensure your travels through the Yellowstone and Gallatin Valley region are safe, comfortable and memorable. The airport includes upper level aircraft loading bridges, a restaurant and lounge, espresso counter, gift shop, conference room, data ports, wireless internet access and much more. The terminal is designed with natural wood and stone and proudly displays works of art depicting the character and nature of Southwest Montana.

Bozeman Yellowstone International Airport is Montana’s busiest airport, providing the only year-round service for two Yellowstone National Park entrances. BZN also serves Big Sky Ski Resort, Bridger Bowl Ski Area, Montana State University, as well as countless other recreation and business destinations in the Bozeman, Belgrade and Livingston area. Located in the heart of beautiful Gallatin Valley, they provide non-stop flights to 15 cities in the United States with connections all over the world.

**Weaknesses / Threats**

**Housing and Construction**

In the second quarter of 2016 the housing index score for Bozeman and the surrounding area was 106.6, meaning that area housing was 6.6 percent above the national average for the quarter. The average price of a new 2,400 square foot home on an 8,000-square foot lot, that met the index collection specifications, was $367,241. The average monthly rental rate for a 950-square foot apartment in the Bozeman area, that met the index collection specifications, was $1,019. Mortgage rates are also taken into consideration when computing the housing index score.\(^{18}\)

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Health Care

Health care represents 10 percent of Montana’s economy (GDP). One in five Montanans will be eligible for Medicare in this next decade.

Bozeman Health is an independent, locally owned and controlled integrated healthcare delivery system serving an eight-county region in Southwest Montana. As a nonprofit organization, governed by a volunteer community board of directors, Bozeman Health is the largest private employer in Gallatin County, with more than 2,000 employees, including 270 medical providers representing 50 clinical specialties. It is our privilege to deliver expert, compassionate health and wellness services across the care continuum, designed to meet the diverse healthcare needs of the communities we serve. Learn more about Bozeman Health at BozemanHealth.org.

Energy Costs

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

Infrastructure

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

Quality of Life/Arts and Culture

The public comment phase showed broad support and concern for a lack of funding for trails, performing arts center, outdoor and indoor performing arts venues and capital for cultural development. There is also concern for the lack of activities to support youth programs, especially teen-agers. There were comments encouraging both retail and art groups to work more cooperatively.

Finance and Business Start-up Resources

The Frontier Angels - Frontier Angels has a long history of helping entrepreneurs refine and grow their businesses. In just the past 10 years, they have lent a hand to well over 50 companies and played a role in their growth. Frontier Angels looks for technology-based companies (software, data/analytics, devices, bio-tech, life sciences, photonics, ag-tech, clean-tech, and energy) in Montana, Northern Rockies, and the Northwest region at the “Seed” and “A” stages. They’re a bit flexible on geography and will occasionally do a "B" round, but they’re disciplined about sticking to our preferred tech
sectors. Their preference is to find companies with unique and defensible intellectual property; a tech-leveraged business model; a core of strong management; and evidence of market demand for their product/solution. However, they’re comfortable with early-stage risks and like to hear from companies with some strengths, even if they’re missing one or two of the elements above.

The role of the angel investor is to provide much more than capital. They offer experience, mentoring, and access to networks of contacts to help emerging companies grow and thrive. Many angel and VC groups say that, but Frontier Angels’ members are successful founders and executives from regional, national, and global firms leading their industry sectors. Helping entrepreneurs refine and expand business plans is a passion for Frontier Angels, not a job. They look for ways to help accelerate product evolution, recruit key team members and expertise, find production resources, arrange distribution, negotiate critical deals, and connect with potential customers and partners.

Next Frontier Capital - Founded in 2015, Next Frontier Capital’s focus is to partner with mission-driven, talented entrepreneurs to build Montana technology companies of impact, utility and value. Montana is characterized by a tradition of entrepreneurship, high university and commercial research activity, quality venture investment candidates, and yet is severely undercapitalized. NFC believes the ramp in venture capital allocation to Utah and Colorado is indicative of Montana's potential and future. The Fund, backed by investors from the world’s top technology and venture capital firms, is seeking Montana technology investment opportunities primarily in industries dominated by high intellectual property values. Example industries of interest are software, healthcare, and optics and photonics. The Fund will serve as a trusted local syndicate partner to non-Montana venture capital firms, while providing Montana entrepreneurs with company formation and growth expertise and accelerated access to talent, partners, and customers.

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

Vision
The District envisions that the place we all want to live is the same place that we can all succeed economically. We are committed to building a strong county economy that preserves our communities’ character and resources while offering economic growth opportunities for our citizens.
We envision economically healthy, thriving communities with diversified economies including manufacturing, technology, links between our educational opportunities and economic sectors, agricultural economies, transportation opportunities linking our communities to each other and to the outside world, improved infrastructure, expanded retail opportunities, improved marketing, promotion and coordination of regional tourism, as well as attraction of outside investment for projects and activities with regional impact.

The seven goals implementing this vision:

**Goal 1:** Promote economic diversity, entrepreneur growth, business retention and seek expansion of the regional economy through targeted business recruitment.

**Goal 2:** Foster effective transportation access and support development of major transportation assets including railroad, airport and highway systems.

**Goal 3:** Promote efforts to expand a skilled, highly educated, permanent, and full time workforce to support local businesses.

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

**Goal 5:** Build on the area’s unique natural assets to develop and enhance tourist industries.

**Goal 6:** Develop new housing solutions and housing units to address region-wide housing need.

**Goal 7:** Maintain and enhance physical infrastructure to make the region more competitive for economic development (in accordance with local government development priorities and capital improvement programs).

The following section sets out specific projects around the District that help implement the goals and vision of this document. Due to staff constraints (as of 2017, the District only has one full time paid employee and one paid employee working ½ time), the following projects have been prioritized according to the feasibility of being staffed by the District. Other projects that will be led by other entities (such as individual cities or other organizations) received lower prioritization.

Where possible, jobs to be added or impacted by a specific project were calculated. In the case of infrastructure projects, this was done using IMPLAN economic impact software. It should be noted that the projected jobs include both new jobs to be added as well as existing jobs to be affected. For other projects, more appropriate metrics were used (numbers of companies worked with, for example).
Goal 1: Promote economic diversity, entrepreneur growth, business retention and seek expansion of the regional economy through targeted business recruitment.

Objective A: Continue efforts to diversify the regional economy

Strategy 1: Attract Entrepreneurs and work-from-home professionals.

Strategy 2: Retain year-round businesses.

Strategy 3: Support legislation which reduces barriers for business growth including tax reform.

Strategy 4: Complete an asset map of the region identifying incubators; venture capital organizations; and urban centers that provide live/work opportunities.

Objective B: Continue recruiting efforts of high tech and global corporations

Strategy 1: Attract medium to large data center corporations.

Strategy 2: Attract national bio-corporations in need of lab and SCIF space.

Strategy 3: Support legislation which reduces barriers for business growth including tax reform.

Objective C: Strengthen and solidify the region economy by supporting local industries to improve quality of life and provide employment opportunities

Strategy 1: Develop an efficient system for tracking available commercial buildings and building sites region wide.

Strategy 2: Assist towns with downtown revitalization such as planning and funding.

Strategy 3: Provide support for small and emerging business through technical assistance and access to capital.

Objective D: Create a region that increases national visibility and is a destination of choice for companies and talent.

Strategy 1: Promote doing business in Gallatin and Park Counties and develop targeted approaches in competitive industries, such as manufacturing, digital storytelling, information technology, supply chain and logistics, health care, engineering, bioscience/life sciences, and financial services.

Strategy 2: Make technology available at sites and buildings to increase attractiveness to companies.
Strategy 3: Use technology to foster innovative education and workforce development.

Goal 2: Foster effective transportation access and support development of major transportation assets including railroad, airport and highway systems.

  Objective A: Participate in regional transportation planning to ensure transportation needs are being addressed and priorities selected support economic development and community plans.

  Strategy 1: Transportation Coordinating Committee, NRMEDD - meetings held with MT Rail Link, Bozeman - Yellowstone International Airport to identify opportunities.

  Strategy 2: Identify new opportunities for development along major transportation corridors, expanding relationships between transportation agencies and NRMEDD.

  Objective B: Identify development opportunities associated with major transportation systems.

  Strategy: As needed, NRMEDD will conduct impact analysis and feasibility studies for major transportation systems.

Goal 3: Promote efforts to expand a skilled, highly educated, permanent, and full-time workforce to support local businesses.

  Objective A: Foster social and economic conditions that promote the recruitment and attraction of a talented workforce.

  Strategy 1: Promote Gallatin and Park Counties as a vibrant place to live with high quality careers.

  Strategy 2: Develop programs that support our local communities and Main Street businesses.

  Strategy 3: Support the development of small businesses that may be supplier to larger emerging businesses; or become licensees and manufacturing entities on their own.

  Strategy 4: Encourage and support expansion of additional affordable broadband services throughout the District.

  Strategy 5: Identify a process to respond to businesses inquiring about relocation to the region.

  Strategy 6: Support Montana State University and Gallatin College education and expansion projects.
Goal 4: Serve as a District-wide forum for coordinating economic development discussion and initiatives.

Objective A. Seek to coordinate efforts with public or private entities to avoid duplication of services and improve access to information or resources for residents of the District Board members and staff.

Strategy 1: Board members and staff will play an active role on local, regional, state and multi state committees.

Strategy 2: District personnel will work with existing employers and those interested in expanding within the region to provide job opportunities for area residents.

Objective B: Foster increased regional partnerships to address economic development needs

Strategy 1: Provide opportunities which link businesses together, for example, hold forums with like businesses (industry clusters).

Strategy 2: Utilize the University of Montana’s Bureau of Business and Economic Research (BBER), the Center for Applied Economic Research at MSU-Billings, the State of Montana’s Census Economic Information Center, and Headwaters Economics to obtain strategic economic data.

Strategy 3: Identify articles that showcase the local area and the economic success stories of the area and share those with others.

Objective C: Provide quality technical assistance for the expansion of Belgrade and Gallatin County Revolving Loan Fund.

Strategy 1: Work with NRMEDD/ Prospera Business Services, Local Banks, Small Business Development Center, Montana Department of Commerce, and other economic development programs to provide business planning and put together viable Revolving Loan Fund loan packages.

Strategy 2: By 2020, expand local funds including the City of Belgrade and Gallatin County’s RLFs.

Objective D: Develop economic clusters to diversify our economy beyond tourism.

Strategy 1: Enhance various sectors of the economy with clustered development of similar industries.

Strategy 2: Develop and implement a plan to establish a District technology initiative that includes a statement of scope, strategy, goals, financing and desired end result.
Objective E: Continue developing local educational curriculum that reflects the needs of local industry and employers.

Strategy: Work with Gallatin College and MSU to emphasize curriculums that equip local students and workforce with skills necessary for the needs of local employers.

Goal 5: Build on the area’s unique natural assets to develop and enhance tourist industries.

Objective: Assist startup, expansion, and retention of viable tourism operations in gateway communities across the District through various economic development tools and services.

Strategy 1: NRMEDD will work with local partners and select clients to Identify and assist in the introduction of new types of tourism in gateway communities across the District.

Strategy 2: NRMEDD will identify new sources of tourist- based income and job benefits.

Goal 6: Develop new housing solutions and housing units to address region-wide housing need.

Objective: Housing affordability and availability.

Strategy 1: Explore the potential of developing regional and local housing authorities.

Strategy 2: Explore mixed-use commercial and residence options in business districts within the region.

Strategy 3: Encourage local governments to develop and implement streamlined development approval procedures.

Goal 7: Maintain and enhance physical infrastructure to make the Region More Competitive for Economic Development (in accordance with local government development priorities and capital improvement programs).

Objective: Assist communities with development of key water/sewer infrastructure, fiber optic and industrial land assets.

Strategy 1: Monitor available commercial buildings and building sites region wide.

Strategy 2: Support and help municipalities as needed to establish Tax Increment Finance Districts and Targeted Economic Development Districts.

Strategy 3: Identify infrastructure and other utilities that are needed to support and grow Business and Community growth.
Strategy 4: Identify and protect lands that possess key siting factors for target industrial recruitment.

IV. Performance Measures

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

Resilience

The following disaster assessment and strategy is adopted as part of the 2017 NRMEDD CEDS. It is not intended to supplant or substitute for any adopted or approved emergency management, hazard mitigation, evacuation, or response plan or policy already or subsequently adopted by either Gallatin or Park Counties. It is intended to identify them as well as to define the relationship between those planning documents and the NRMEDD and economic development in our region as well as include them by reference in this CEDS.

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

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

"Emergency" means the imminent threat of a disaster causing immediate peril to life or property that timely action can avert or minimize.
In the event of a disaster, the NRMEDD, in conjunction with its regional partners, is prepared to facilitate planning and recovery efforts as outlined in the following strategy document. Both Gallatin and Park Counties have adopted extensive and comprehensive Hazard Mitigation Plans; this brief strategy is in no way intended to undermine or replace those existing plans nor any other federal or state disaster plans. This document simply establishes the District’s role in both pre- and post-disaster planning and recovery.

**Phase I: Pre-disaster Preparedness Assessment**

**Engaging in Pre-Disaster Recovery and Mitigation Efforts**

The NRMEDD attempts to participate, either directly with staff, technical committee members, and/or District Board members, in recovery and mitigation planning efforts. Each county maintains a variety of response plans developed under national guidelines. For Gallatin County, those plans can be viewed at: [www.readygallatin.com](http://www.readygallatin.com)

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

- Gallatin County Emergency Management Plan – 2016
- Gallatin County Mitigation Plan – 2012
- Gallatin County Hazardous Materials Plan – 2009
- Gallatin County Multiple Patient Incident Plan – 2014
- Gallatin County Rural Fire Operating Plan - 2015
- Gallatin County Medical Volunteer Framework – 2010
- Gallatin County Community Wildfire Protection Plan – 2006
- Gallatin County Emergency Alert System Plan - 2010
- Gallatin County Mutual Aid Agreement – 2011
- Gallatin County Fire Control Ordinance
- Middle Creek Emergency Action Plan and Inundation Map
- Willow Creek Emergency Action Plan
- Hebgen Emergency Action Plan
- Madison Emergency Action Plan
- Montana Disaster and Emergency Plan
- Montana Hazardous Materials Response Plan
- Montana Emergency Alert System Plan
- Intrastate Mutual Aid System
- Mutual Aid Frequency Plan

According to the Ready Gallatin website, the mission of Gallatin County Emergency Management is “to minimize loss of life and personal injury, damage to property and the environment from disasters, both natural and manmade. We will work diligently to enhance our all-hazard emergency management program. We strive to accomplish this
through a continuing program of outreach, coordination, planning, training, and exercising, for all hazards and for all four phases of emergency management – mitigation, preparedness, response, and recovery” (https://www.readygallatin.com/mitigation/). Updated July 1, 2017.

The Guiding Principles of Gallatin County Emergency Management are:

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

Park County also has its own set of plans. Those documents can be viewed at http://www.parkcounty.org/site/1DES.html. Updated September, 2011.

The plans that can be accessed from this website include:

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