

Helena Tri-County Region



Comprehensive Economic Development Strategy (CEDS) 2014-2019

Montana Business Assistance Connection (MBAC)

Acknowledgements

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*We thank the cities and counties, local chambers of
commerce and the citizens of the region for their
participation.*

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“Helena Region CEDS”

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Executive Summary

The Montana Business Assistance Connection catalyzes community leaders, stakeholders, and opportunities driving prosperity, our economy, business vitality, high quality job growth and the enhancement of quality of life throughout the region

Broadwater, Lewis and Clark, and Meagher counties have an abundance of natural beauty, pristine water, and abundant wildlife. The counties are rich in mineral, agricultural and forest resources, but their economies have been impacted by the downturn in these industries. Area leaders are therefore focusing on diversification of industries, workforce development, business clustering and enhancement of their infrastructure and transportation. Problems and challenges exist and much needs to be done to meet the needs of the region in order to achieve the objectives and goals of the Comprehensive Economic Development Strategy, better known as CEDS. The District encourages a regional approach to solving these problems.

The Montana Business Assistance Connection (MBAC) region CEDS provides guidance for local and regional economic and community development planning. It builds upon established initiatives to create jobs and increase capital for businesses and economic development. In addition, it focuses on issues that enhance the quality of life for its residents in the three-county region.

The CEDS process uses modern survey instruments, collection of census and other data as well as face-to-face meetings, public hearings, focus groups, and TV media presentations. This process relies heavily on our local partners at the cities and counties, but also includes the regional chambers of commerce and local Economic Development Organizations (EDO's).

The District's economy is no longer driven by commodity prices dictated by world markets or the cyclic funding related to state and federal government spending. As identified in a recent Targeted Industry Analysis, the areas of light manufacturing, medical, business analysis, value-added agriculture and tourism are emerging and growing industries that create a strong backbone for a stable economy.

The 5 goals guiding the District over the next five years are:

Goal 1: Increase the number of jobs and investment via entrepreneurial business formation, recruiting firms, and retention and expansion of businesses throughout the District.

Goal 2: Focus activities on industrial sectors exporting goods and services from the District in order to maximize positive economic multipliers to the District economy.

Goal 3: Build on unique assets by exploiting existing strengths as identified in the Target Industry Analysis, including Industrial Cluster Development.

Goal 4: Maintain and enhance the District’s physical infrastructure including the development of industry ready properties and strategic infill.

Goal 5: Foster effective collaborations with organizations such as regional colleges, Service Corps of Retired Executive (SCORE), Small Business Development Center (SBDC), firms, Local Development Organizations (LDOs), and local governments to leverage additional resources for economic development.

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 regarding their goals and concerns.

Organization and Management of the CEDS Process

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

The CEDS is formally updated every four years to meet the changing needs and conditions of the area. The CEDS committee oversees the formal revision as well as the annual updates so that the staff work-plan is meeting goals and objectives of current and future community needs.

The work plan recognizes current situations and trends to help communities plan for future needs. By looking at past demographic trends and future demographic projections, it is imperative that communities continually assess their infrastructure and plan for future needs.

MBAC’s planning and economic development activities will influence future activities by improving regional economic conditions through coordinated community development efforts. MBAC will assist local governments in planning public works and coordinating public and private investment. By taking an advisory role, MBAC will assist in attaining the area’s goals and objectives.

Elements of the CEDS process:

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

Who We Are

MBAC’s mission is to catalyze community leaders, stakeholders, and opportunities driving prosperity: our economy, business vitality, high quality job growth and the enhancement of the quality of life throughout the US Economic Development Administration MBAC Economic Development *District* which includes Broadwater, Lewis and Clark, and Meagher counties. In addition to the US EDA District, MBAC also works closely with Jefferson County for economic development.

This mission includes:

- 1) To create and keep jobs and investment with various strategies, e.g., supporting entrepreneurship, retention and expansion of existing businesses, recruiting firms and capital formation.
- 2) The creation, promotion and management of public and private revolving loan funds to support capital formation.
- 3) Evaluation and development of county and city community infrastructure required for economic development.

The MBAC Board of Directors and CEDS Committee members represent city and county governments, local economic development agencies, job centers, businesses and other interested parties.

Both the CEDS Committee and the Board of Directors oversee the CEDS process. The broad representation of both the CEDS Committee and Board of Directors ensures that all viewpoints

of the communities are considered. The representatives promote the utilization of local skills and resources in the program-formulation and implementation.

The *District* is required to appoint representatives to the Board of Directors and CEDS Committee that will represent the views of the following sectors:

- 1) Elected officials: Public leadership is essential for the coordination necessary to develop and implement the CEDS.
- 2) Private business representatives: members contribute their own experiences in business towards economic development initiatives.
- 3) Economic development organization: Members contribute their organizational/county focus towards economic development initiatives.
- 4) Employment and training sector: Links to labor force skills, initiatives and focus is crucial.
- 5) Community organization and other special interest groups: Members contribute unique perspectives so that all issues are appropriately considered.
- 6) Women, minorities, aged and disabled: The CEDS must appropriately address all the needs of its residents.

Montana Business Assistance Connection Staff:

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Project Interns

History of Economic Development in Region

This document has grown out of the East Helena Area Economic Adjustment Strategy (EAS) completed in 2002. The closure of the East Helena smelter in 2001 motivated the study as a way of finding new directions for the newly unemployed smelter workforce. One of the recommendations of the EAS was to form an Economic Development District under the auspices

of the Economic Development Administration (EDA). An EDA prerequisite to forming an Economic Development District is the compilation of a regional CEDS. This allows the Economic Development District to qualify for assistance from the EDA for public works, economic adjustments and planning projects.

Soon after, work began to form the Gateway Economic Development District (Gateway EDD) with its own 501(c)3 designation. In 2004, the CEDS document was submitted to the EDA and in November of 2006, the three counties were designated as the Gateway Region. In March of 2007, Gateway EDD received its first planning grant. In 2011, Gateway Economic Development District became a subsidiary of the Montana Business Assistance Connection with the same board of directors.

Broadwater County

Broadwater County Development Corporation is a local Economic Development Organization (EDO) that was formed in August of 1980. The organization is active and currently has a membership of 61, with a 7 member board of directors. There is no paid staff.

Lewis and Clark County

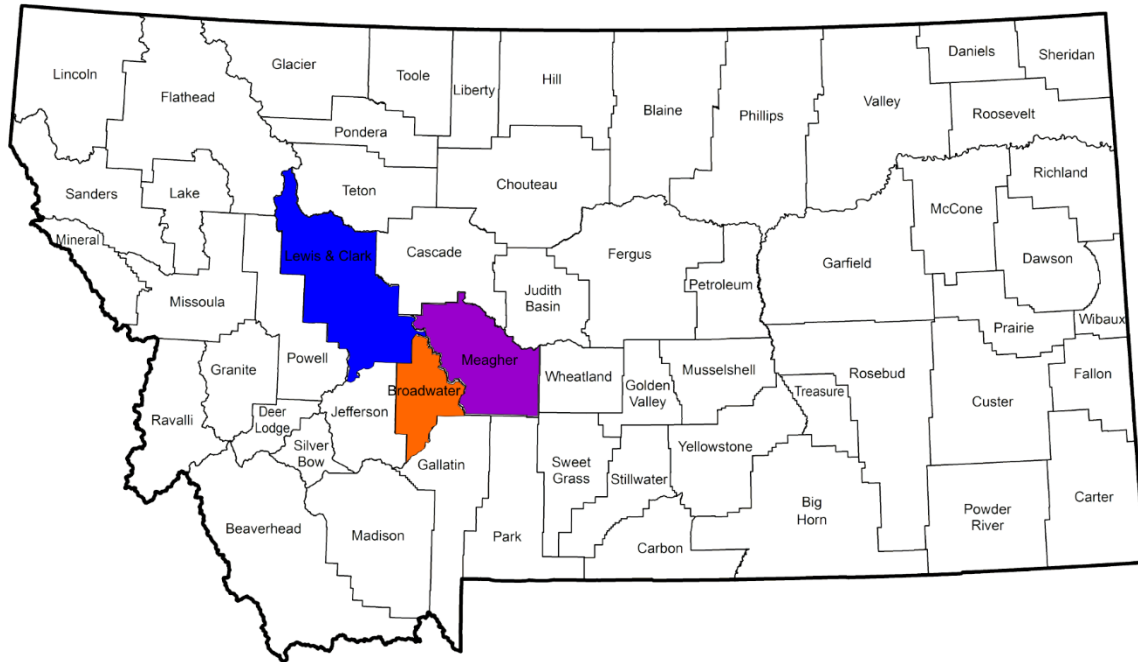
Helena Area Development Corporation (HADCO) was formed in the Helena region to perform Economic Development activities. This organization grew into Gateway Economic Development Corporation, with the addition of Gateway Economic Development District in 2006. The organization combined into Montana Business Assistance Connection.

Meagher County

Meagher County joined Northern Rockies RC&D and Montana Business Assistance Connection at the same time. They relied on MBAC to provide a Small Business Development Center (SBDC) and lending capabilities, and Northern Rockies RC&D to work on housing and resource development. In 2013, Northern Rockies RC&D ceased to exist as an organization.

MBAC

Regional Overview



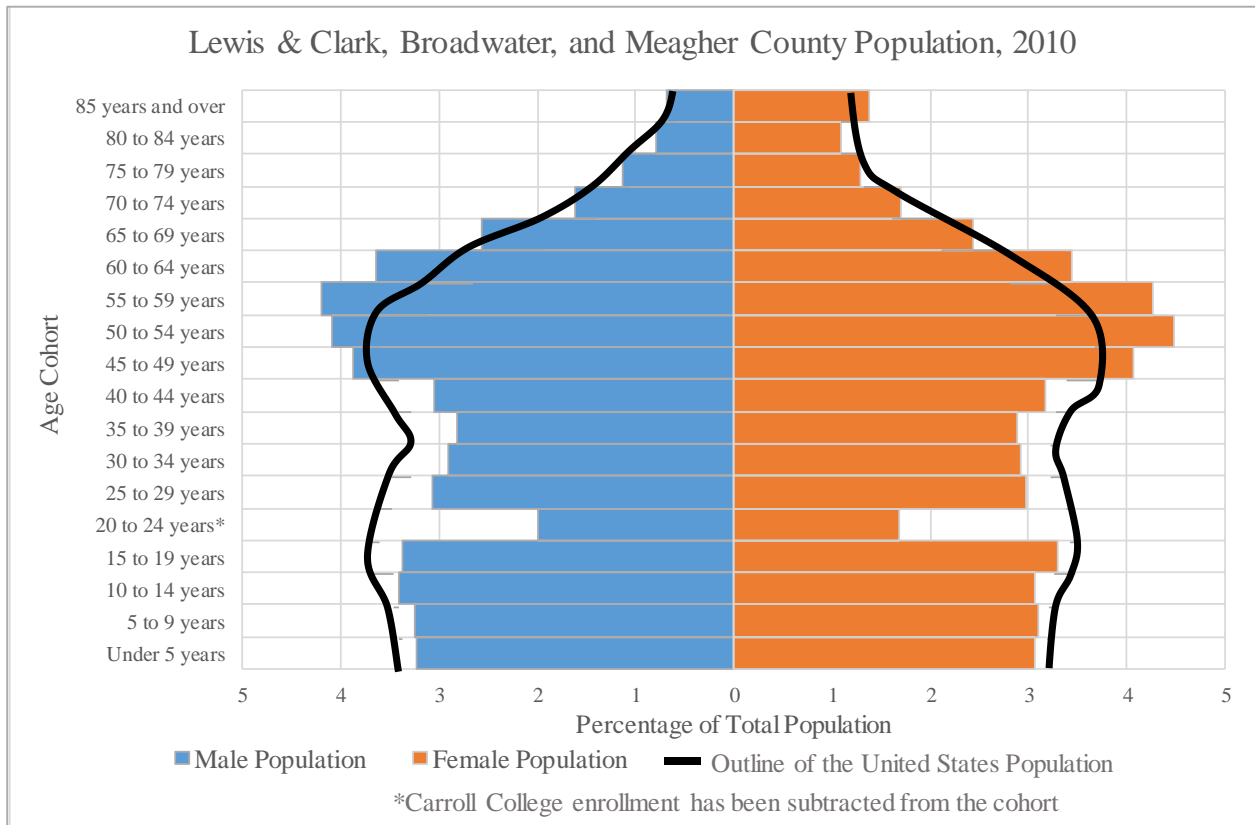
MBAC is the Capital Region of Central Montana including:

- **Lewis and Clark County** pop **63,395** **3,498 square miles**
 - City of Helena pop **28,190**
 - City of East Helena pop **1,984**
- **Broadwater County** pop **5,612** **1,239 square miles**
 - City of Townsend pop **1,878**
- **Meagher County** pop **1,891** **2,395 square miles**
 - City of White Sulphur Springs pop **939**

The MBAC region incorporates the central portion of the State of Montana, east of the Continental Divide. It is defined by large mountain ranges with expansive river valley bottoms. The modern history of the region evolves out of placer gold deposits that spurred agriculture and logging to support the boom towns of the region.

Demographics Analysis

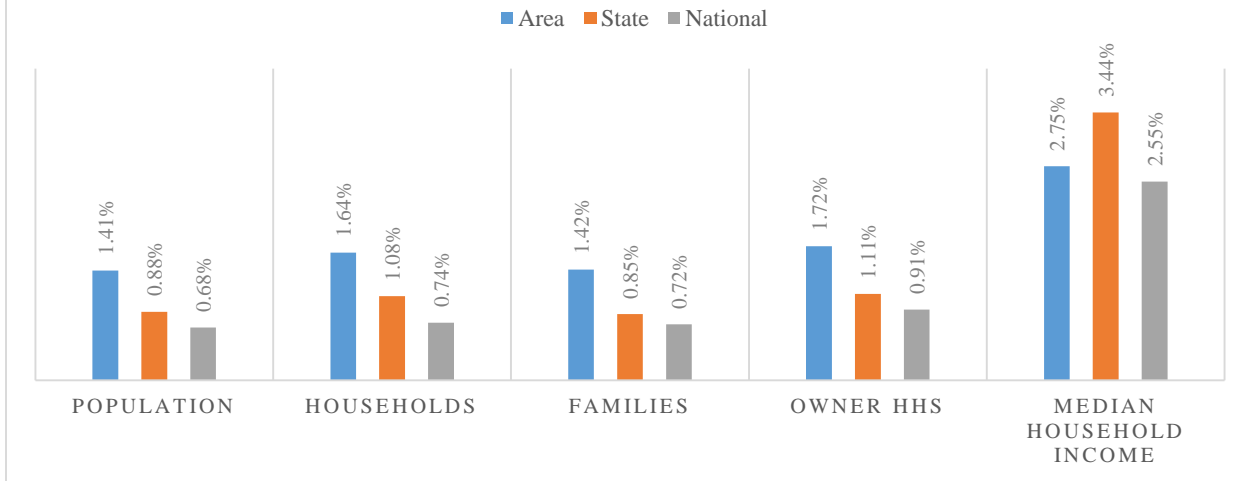
The MBAC region incorporates the Capital City of Helena, and the surrounding rural communities of East Helena, Lincoln, Craig, Townsend and White Sulphur Springs. The region as a whole is experiencing a graying populous, much like the rest of the State of Montana. The population pyramid of the region shows the out-migration of the cohort age brackets 20-44, as compared to a national normal line. This corresponds with an unusually high grouping of the 45-69 cohorts.



Source: US Census Bureau

At the same time, the region is outpacing the population growth rates for the State and the Nation. The MBAC region is estimated to experience a 1.41% annual population growth rate as compared to the Nation at 0.68% and the State of 0.88% (see bar chart below). As defined in the following County chapters, this growth rate is not across the District. Population growth is clustered in specific regions of the MBAC area.

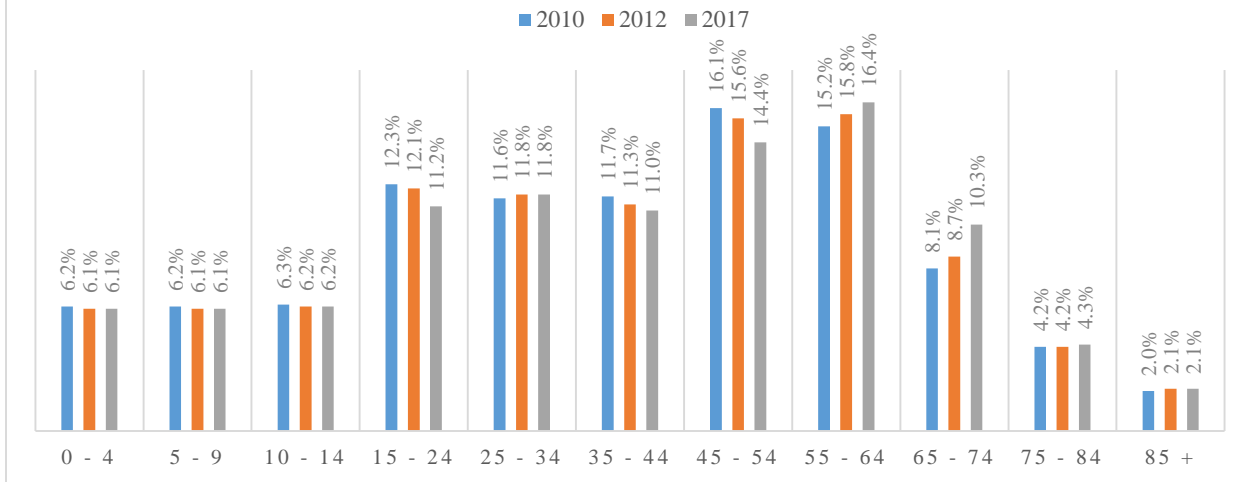
TRENDS: 2012-2017 RATE OF GROWTH



Source: Esri Business Analysis

The age projections per cohort continues to show the graying of the region. The youth are flat in numbers and the elderly numbers are growing looking forward 5 years. The young professional cohort continues to experience out migration, and the later aged working class continues to grow.

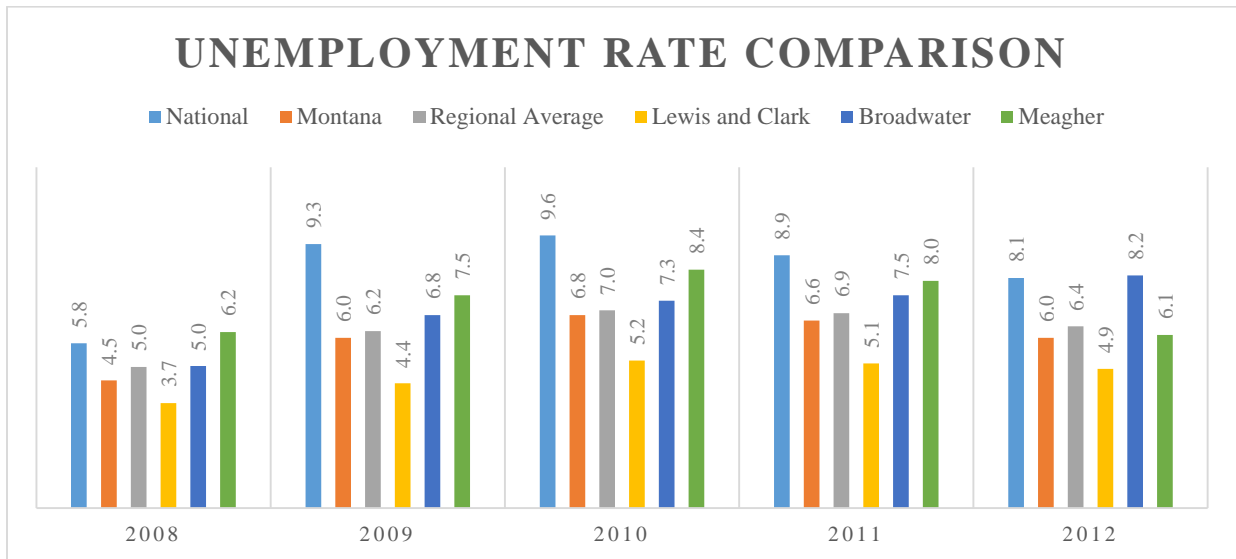
POPULATION BY AGE PROJECTIONS



Source: Esri Business Analysis

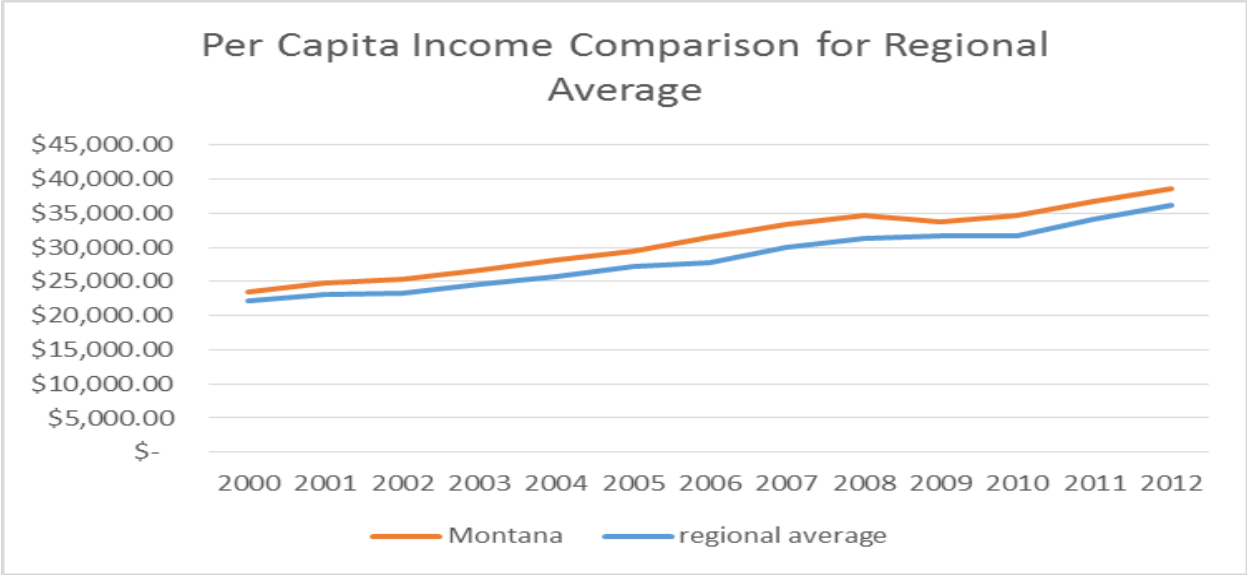
Economics

To summarize, the regional economy is anchored by state and federal employment in the state capital of Helena with diminishing economic activities in the peripheral counties of Broadwater and Meagher. Commodity prices for agriculture products have been steady and increasing the past years, as compared to the timber industry that was severely impacted by the slowdown in housing starts.

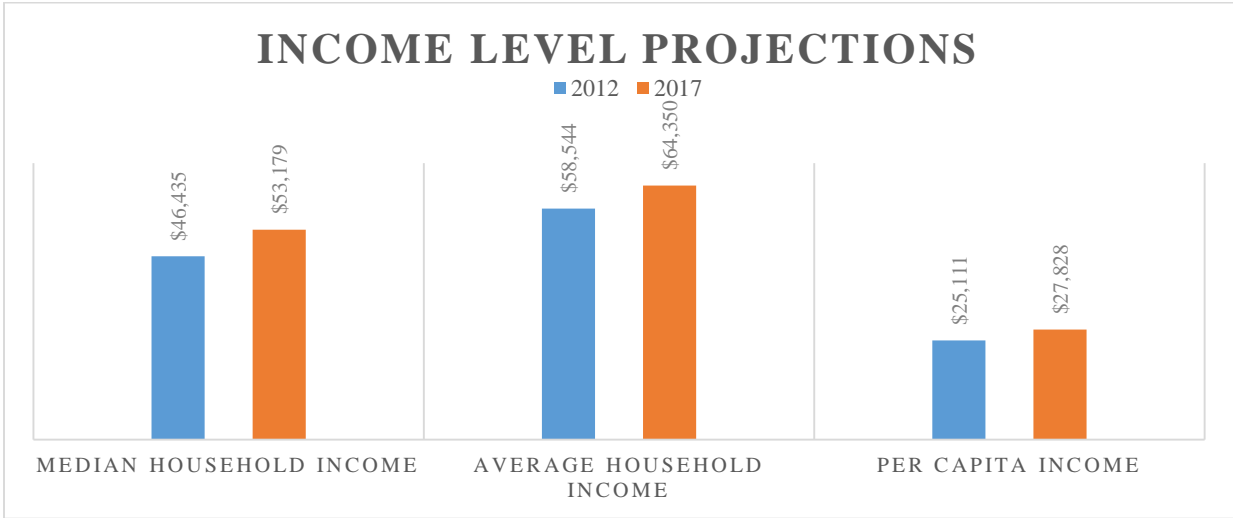


Source: Federal Reserve Economic Data (FRED)

District projections looking forward relating to income levels shows growth rates similar to the state. Median household income is anticipated to grow by 14%. Average household income 9.9%, and per capita income is anticipated to grow 10.8%. However, income growth in Lewis & Clark County with the largest employment pool masks reducing incomes in peripheral counties - in particular Meagher County

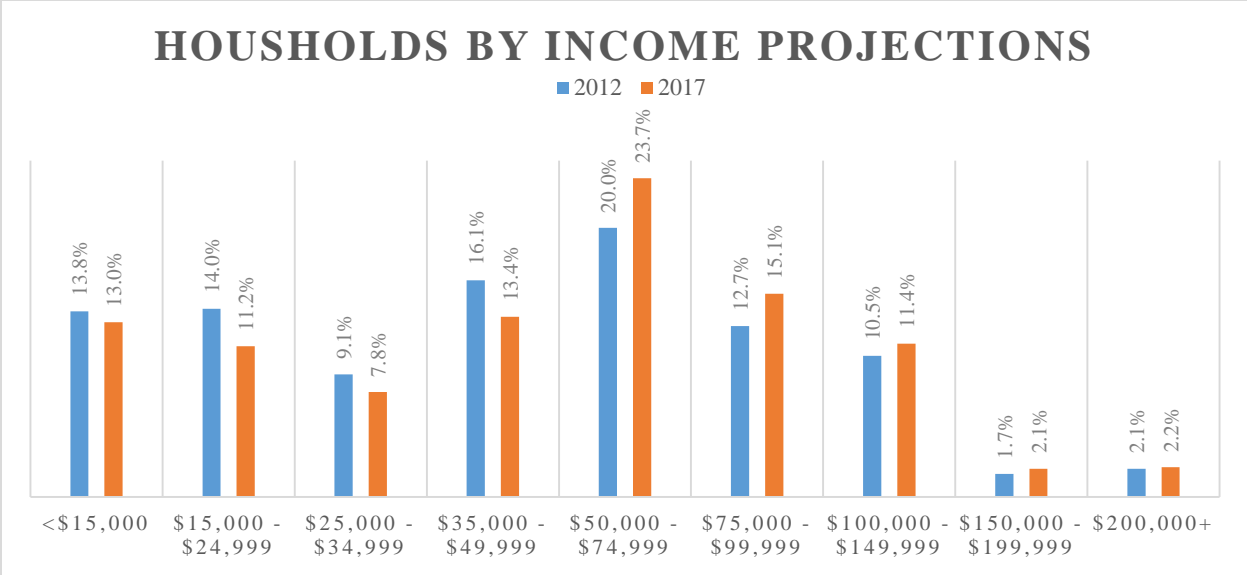


Source: US Census Bureau



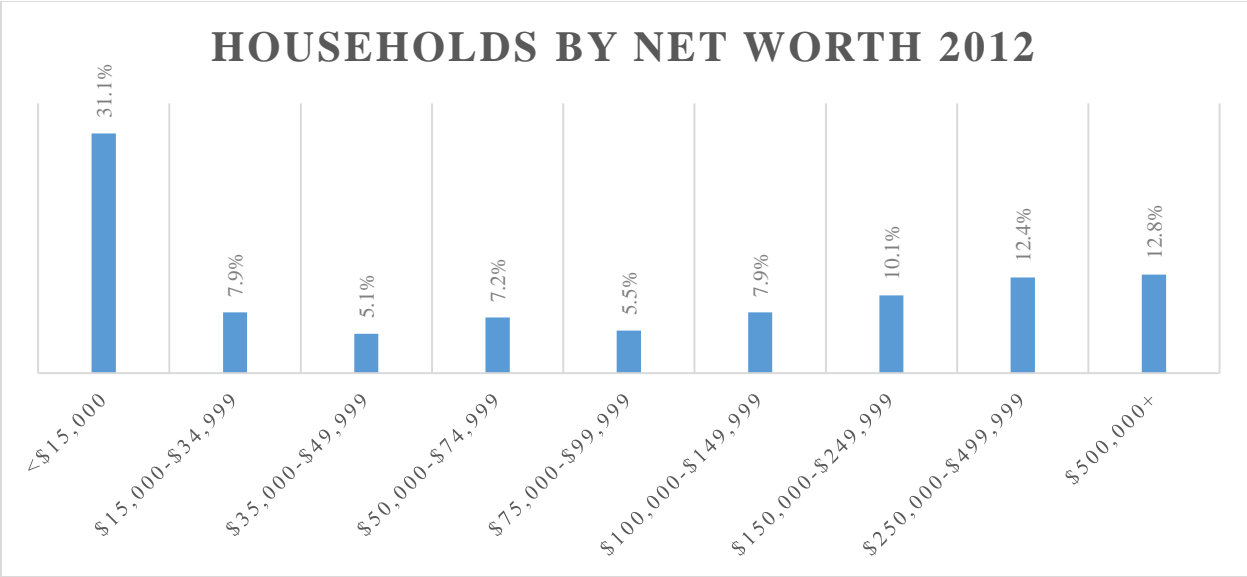
Source: Esri Business Analysis

Breaking that growth down shows that families in the lower-wage brackets will be decreasing over the next 5 years, whereas households that make greater than \$50,000 appear to be growing.



Source: Esri Business Analysis

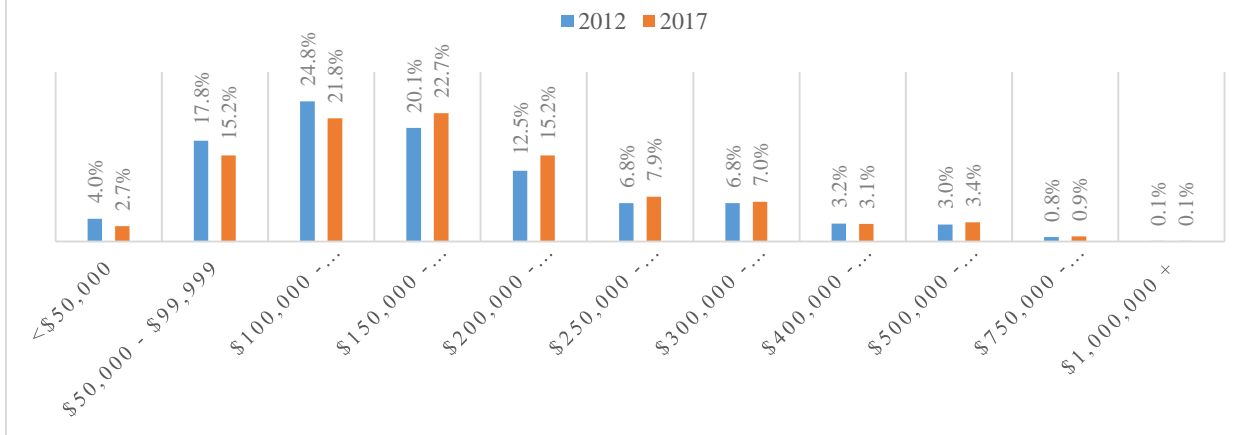
The following chart shows the distribution of the population by net worth:



Source: Esri Business Analysis

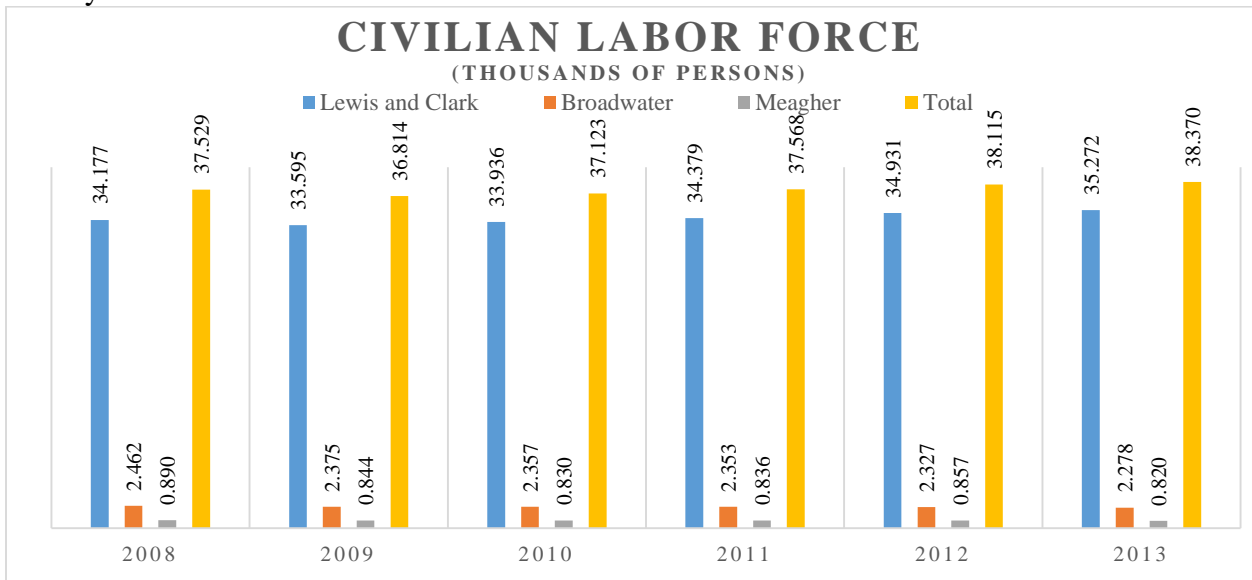
Projections of housing values shows that housing stocks in the region will be trending towards the \$150,000 to \$250,000 values.

VALUE OF OWNER OCCUPIED HOUSING UNITS PROJECTIONS



Source: Esri Business Analysis

The labor force in the region shows two different realities: the rural communities of Broadwater and Meagher Counties are showing a labor force that is declining, whereas Lewis & Clark County is a slow increase.



Source: Federal Reserve Economic Data (FRED)

Resources

The economy of the MBAC region was, and still is, driven significantly by the resources of the region. Agricultural and mineral resources of the area continue to contribute significantly to the overall economy. These two industries are seeing renewed interest in niche or select markets. This includes projects that are focusing on “Farm to Fork” food markets, as well as mineral extraction in select high-grade mineral lodes, specifically tunnel applications.

Resources related to the workforce continue to grow in the region, but are starting to show the stresses of an aged workforce. This aging workforce, coupled with an out-migration of the youth, will pose pressure on the economic engine of the region. As an example, 43.3% of the 6,145 government workers that live in Lewis & Clark County are aged 55 or older. In 1995, 56 government workers that lived in Lewis & Clark County were older than 65. Today that number exceeds 300.

Economic Development resources in the region are limited. MBAC and its collaborative agencies that include the cities, counties and chambers of commerce must be very selective and prioritize projects to create the greatest impacts.

Infrastructure

The MBAC region is not large by population, but does have the infrastructure of a larger community. It has direct access to the interstate highway system, both east-to-west with I-90, as well as the north-south utilizing I-15. The region is serviced by *Montana Rail Link* with mainline traffic, but also with daily service for small lot delivery and pickup. Commercial air service is provided by Helena Regional airport with direct flights to Seattle, Salt Lake, and Denver. Regionally, the rural communities provide small airports with available fuel.

City services are available with a varied level of capacity and life expectancy. On the whole, the regional governments continue to invest in this infrastructure and to keep compliant with regulations.

MBAC

Regional Vision and Implementation

The CEDS outreach process has created an economic development mission and a series of goals that Montana Business Assistance Connection has adopted. Through their implementation, this vision and associated goals will create a roadmap to guide the economic development priorities of the region and the organization.

Vision:

MBAC catalyzes community leaders and regional stakeholders to create opportunities that drive prosperity in our economy. These goals and actions grow business vitality, create high quality job growth and enhance the quality of life throughout the region which includes Broadwater, Lewis and Clark, and Meagher counties.

The 5 goals guiding the District over the next five years are:

Goal 1: Increase the number of jobs and investment via entrepreneurial business formation, recruiting firms, and retention and expansion of businesses throughout the District.

Goal 2: Focus activities on industrial sectors exporting goods and services from the District in order to maximize positive economic multipliers to the District economy.

Goal 3: Build on unique assets by exploiting existing strengths as identified in the Target Industry Analysis, including Industrial Cluster Development.

Goal 4: Maintain and enhance the District's physical infrastructure including the development of industry ready properties and strategic infill.

Goal 5: Foster effective collaborations with organizations such as regional colleges, SCORE, SBDC, firms, LDOs, and local governments to leverage additional resources for economic development.

The community outreach process fostered similar but unique concerns and opportunities for each county. In this document MBAC has created an overarching strategy and objective for the region, but with community sub-sections included that drill down to the local concerns.

As an overview, we have created a synopsis of each region:

Broadwater County:

The community sees a need to focus on the continued diversification of their business sectors, reinforcement of the health care segments to reflect trending demographics and a need to enhance the Quality of Life issues with an emphasis on recreation.

Lewis and Clark County:

The community has a stable economy that significantly relies on public sector employment. The demographics of the state and federal workers shows that a large number of these workers are approaching retirement age. The lack of balance with private sector industries in the region will create a worker shortage in technical segments. The region needs to focus on diversifying the economy by expanding the private sector, accompanied with emphasizing education and training to help fill the skills gap that will be growing in the public sector in the near future.

Meagher County:

The Community has not seen the population growth that the rest of the region has experienced. Livability issues dominate the public discourse with the need for quality jobs with an emphasis on the “Look” of the community. The region needs to improve infrastructure and enhance appearance, but at a “cost” that is manageable. Prioritization and outreach to regional partners is a priority, as well as taking advantage of the natural attributes of the region which includes recreation, agriculture and natural resources.

Community Feedback

During the CEDS process, MBAC received community feedback from several persons. The following is a list of the questions asked and the categories that most of the responses fell into.

- 1) What do you think are three of the Helena region’s economic problems (Lewis & Clark, Broadwater, and Meagher Counties)?
 - a. **The location**
 - i. The area seems to be stuck in the middle of Great Falls, Missoula, and Bozeman.
 - ii. It was also noted that one of the region’s best kept secrets was its location
 - iii. Harsh winters. The tendency for the winter to be colder and see greater snowfall may detract from a growing tourism industry.
 - b. **Infrastructure**
 - i. There is a lack of infrastructure outside cities.
 - ii. There is also a lack of transportation by bus, plane, or train.
 - iii. There is also a significant shortage of infrastructure in the K-12 education system
 - c. **Work Force**

- i. The economy is too dependent upon governmental jobs (mostly Lewis and Clark region, Helena specifically)
 - 1. It was also noted that this helped to provide stability
 - ii. Due to low population levels, finding enough of a workforce is also a challenge
 - iii. Many jobs are low paying, especially in the retail and service industries
- 2) What do you think should be three goals of a Helena region economic strategy?
 - a. **Strengthen current business**
 - i. Help current businesses to grow and expand
 - ii. Provide support to help retain existing business
 - b. **Expanding diversity**
 - i. Diversify employment. Many jobs in the Helena region are in the public sector.
 - ii. Attract more new businesses to help fuel growth and diversify the workforce.
 - c. **Developing opportunity**
 - i. Create more of a recreational atmosphere to make the region more attractive to new comers
 - ii. Provide more opportunities for retired workforce
 - iii. Build a business park in Helena to give new business a place to build.
- 3) What do you think should be three tactics of a Helena regional economic strategy?
 - a. **Assist current and attract new business.**

SWOT Analysis

District Strengths: The most notable strength of the regional economy is that Helena is the state capital with a high percentage of government jobs and related jobs in services and retail. The government sector provides economic stability. Also, in many households both spouses work in government which raises median household income. However, the government sector will not significantly expand, and the economic effect of government reduces with distance from the capital: the District's Meagher County receives little benefit and has significant poverty.

District Weaknesses: A common regional economic development problem for all District counties is the lack of jobs for persons in their 20s. Demographic analysis shows the 20-30 year old cohort continue to leave the District to find employment and the population left behind is aging. The prime working-age labor pool is shrinking and the dependent aged population is growing.

District Opportunities: The most significant economic opportunities include the expansion of aerospace manufacturing with almost 100 new jobs in 2014 and the possible development of a new copper mine in Meagher County that could generate 300-400 area jobs by 2018. Another

smaller opportunity is the development of national-brand stores in Helena that attracts consumers from the surrounding region. However, the new national retail development has reduced consumer demand for local stores which have been forced to close, e.g., the Helena Capitol Shopping Mall is almost completely vacant and downtown stores have recently closed in traditional retail centers.

District Threats: The major economic threat to the district is that historical trends continue: 20-30 years olds leave, the population ages, and incomes stagnate or lower. Furthermore, MBAC is focused on Meagher County due to high poverty rates (20.2%) and low per capita income (65% of US amount).

District Economic Development Strategies: These economic trends are the reasons for MBAC to facilitate the creation of export jobs and export investments while continuing to support the retention and expansion of existing businesses, and entrepreneurship. Retention and expansion of businesses will most likely result in modest job creation and retention. Exporting and entrepreneurial firms are the most likely to create new jobs and attract new investment. This is MBAC's first-level priority to bring in and develop new-job creating firms. Preconditions for recruiting exporting firms and developing entrepreneurial firms are respectively ready sites and financial capital. Preparing sites/infrastructure and capital formation are MBAC's second level priorities. MBAC is focused on Meagher County due to its poor economic condition and the possibility of a major new employer with the proposed copper mine.

Public Meeting
February 26, 2014
Meagher County Community Senior Center

15 Community members attended this Public Meeting to discuss Meagher County's Housing and Public Facility needs. Four questions were proposed to generate ideas and discussion.

1. 'What are the strengths and the positive things about living here?'

In discussing this question it is evident that Quality of Life is the most valued trait and encompasses water quality, air quality, the proximity of outdoor sports such as hunting, fishing, camping and skiing. The lower cost of living and smaller population were also seen as assets. Meagher County is a positive place to raise children and has many community activities and clubs such as American Legion, Girl & Boy Scouts, FFA and Rotary. Other positive aspects include good infrastructure such as roads, new water & sewer, a new barn for Ambulance storage and the quality of the Fire Department. Other amenities include a diverse range of services including the Food Bank, Senior Center, Schools, Youth Center, Pre-School, Home Health Services, Skilled Nursing Facility, Hospital, Medical Clinic and the Library. [The library is currently undertaking a capital campaign to construct a larger facility]

It was also noted that there are multiple local businesses that are unique such as the Spa, Pizza Theater and Red Ants Pants clothing.

2. ‘What don’t you like about living here?’

Many public buildings are very old and need updating to accommodate accessibility and improve safety. Those specifically mentioned were the schools, Jail, Courthouse, Food Bank and the Union Hall Building. Discussion also took place regarding the current housing stock. Many homes are so outdated that they will not sell and /or meet financing criteria. Out of Town transportation for medical appointments was noted as an issue along with not having a dentist in town. Economic Development was discussed as a need not only to attract additional businesses but also as a means to keeping younger people in the area. It was noted that the current watering system at the Cemetery does not allow for even watering and new trees often die due to lack of consistent water. An underground irrigation system is needed.

3. ‘What would make this a better place to live?’

Much discussion centered on the need for land use regulations and that the current City/County regulations need to be enforced so that some land owners do not create an unfavorable environment by leaving trash, abandon cars and junk in their yards as this also drives down property values and discourages new business. The group discussed the need for recycling programs and to reinvigorate the revolving loan fund as some potential ways to address the issue of abandon junk. It was also felt that coordination between the City, County and Chamber with the addition of a staff position to acquire and monitor available grants/funds would result in more success.

The ability to attract new businesses such as a bakery, gym, and U.P.S. store were seen as very important to improving the area. The availability of a walking/bike trail and transportation was also noted as a need.

The ability to attract new business and to plan for an influx of 50 — 75 families that would potentially relocate to the area if the Tintina mine goes forth is directly tied to the availability of housing. Much of the current housing stock is substandard and there is a need for both market and affordable rental housing as well as 3 — 4 bedroom for sale homes.

4. How do you envision White Sulphur Springs/Meagher County in 5 years; 10 years?

A community with managed growth and zoning regulations that would attract new business catering to an increased population sums up the vision of the future. This vision sees a community with all downtown buildings occupied, more sidewalks throughout town and a community that is conducive to having people want to live here.

Meeting summary by Mary Martin, Facilitator
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Following are SWOT details for each District county.

Meagher County – March 2013

Strengths:

- Centrally located between Helena and Great Falls cities.
- Natural resources
- Scenic Beauty
- Diverse recreation opportunities
- Fiber optic Connectivity

Weaknesses

- Aging Population
- Declining economy
- Opportunity for Jobs
- Aged or limited infrastructure

Opportunities:

- Natural Resources – Mining/Gas
- Recreation Tourism
- Fiber to house/business
- Travel route
- Hwy 12 reconstruction in White Sulphur Springs

Threats:

- Lack of job opportunities
- Aging population - lack of youth for school and business
- Absentee land owner – fewer working acres and dwindling cow/calf numbers
- General decline of community aesthetics towards blight.

Broadwater County - Public Hearing - December 2013

- ❖ Increased usage of City Pool, could become a Community Pool that could be used year round.
- ❖ The need for increased access to care related to Alzheimer's and Dementia.
- ❖ The need to review access to Assisted Living which may include Adult Daycare.
- ❖ The need to focus on "Value Added Agriculture" niche markets. This might include access to mobile processing units. This could include chickens, hops, beans, etc.
- ❖ The need to expand the imaging capabilities at the local medical facility.
- ❖ Focus on taking greater advantage of grant opportunities. The community and region are growing, look for opportunities to leverage grants to make the region more "livable" and to improve the infrastructure provided in the City and County (garbage, water, sewer, streets, roads, police, weed, mosquito, ambulance, fire, search & rescue).
- ❖ The local weather is milder than much of the surrounding area. How do we take advantage of that?
- ❖ Re-address/freshen up the Theme or Branding for the area.
- ❖ Look for outside investment in private recreation related activities, Golfing, Water Slide, Gaming, Hotel, etc.
- ❖ The need for an appropriate sized conference/meeting space. Our location would allow the region to hold meetings, conferences etc.
- ❖ The need to attract or expand the access to an upscale restaurant.
- ❖ The need to attract or expand niche shopping, similar to Goosebay Glass.
- ❖ The need to attract greater "Economic Diversity". Anything that could be done to reinforce the existing business sectors (Agriculture, Timber, Mining, Manufacturing, etc.) would be very helpful, but to also look for new industries that would further diversify the region.
- ❖ Affordable housing—this included access for those that cannot afford quality housing, but also access to appropriate sized housing.
- ❖ Increase in passenger rail service. Is there means to increase access to transportation, or the ability to telecommute?
- ❖ Look for a better facilities for the Ambulance and other safety related services provided regionally.

MBAC

Action Plans and Implementation

MBAC Regional Action Plan

| CEDS Strategy | Priority | Objective | Lead Agency | Time Frame | Jobs | Action Item | Resources |
|--|----------|--|----------------|------------|-------|--|---|
| Business Attraction | A | Develop a Targeted Approach to Attract Businesses to the Region based on Target Industry Analysis (TIA). | MBAC | 2014-2019 | 100's | Use TIA to determine specific Niche Market firms to recruit that have highest job & investment potential. | MBAC, Chambers, and Governor's Office of Economic Development. |
| Education & Outreach | B | Build an more encompassing Business Education and Outreach System for Entrepreneurs | Helena College | 2014-2019 | | Establish a relevant SBDC presence in Helena College | Personnel – Helena College, Job Service, Carroll College |
| Workforce Development & Education | B | Provide opportunities to increase the performance and efficiencies of the workforce | Helena College | 2014-2019 | | Target workforce training opportunities | Job Service, Helena College, Carroll College |
| Business Monitoring for Technical Assistance | A | Provide Responsive Business Expansion and Retention BEAR (Business Expansion and Retention) Program. | MBAC | 2014-2019 | 100's | Coordinate with SCORE, SBDC, and Helena College and Job Service to provide Services that promote the expansion of Entrepreneurs. | Personnel – Score, SBDC, Helena College, MBAC, Job Service |
| Cluster Development | A | Focus on export industrial sectors to exploit the Strengths of the region. | MBAC | 2014-2019 | | Use US DoC regional multipliers for the District to clarify target clusters such as aerospace. | MBAC, Helena College, and Governor's Office of Economic Development. |
| Infrastructure | B | Identify utilities that are needed to support further Business and Community growth | MBAC | 2014-2016 | | Prioritize properties and costs associated with infrastructure expansion and assist in grant writing to fund projects. | Municipalities, Counties, MBAC, Dept. of Commerce for CDBG. |
| Commercial Property "Shovel Ready" | A | Develop/Assist to provide property options that address the area's needs | MBAC | 2014-2016 | | Identify properties that need redevelopment/infill | Central MT Brownfield Coalition, regional developers and real estate firms. |
| Commercial Site Selector | C | Expand the use of the Site both by clients and owners | MBAC | 2014-2018 | | Work with GOED to promote the site to more real estate firms to input data. | GOED, MBAC, Realtors Associations |
| Capital Formation | A | Increase sources of capital via revolving loan funds (RLF), joint-ventures with banks, development of equity capital | MBAC | 2014-2018 | 100's | Increase MBAC RLF funds, collaborate with banks, and promote private placements and Angel fund formation. | MBAC, Banks, Angel Funds, |

Broadwater County Action Plan

| CEDS Strategy | Priority | Objective | Lead Agency | Time Frame | Jobs | Action Item | Resources |
|--------------------------------|----------|---|----------------|------------|-------|---|--|
| Broadwater Health Center | A | Expand the offerings that make the Facility Profitable | MBAC | 2014-2016 | 85 | <ul style="list-style-type: none"> • Provide Funding that supports expansion of the Imaging Department • Promote Assisted Living offerings • Provide Dementia facility | BHC, MBAC, Dept. of Commerce, |
| Conservation of Silos Property | C | Restore Structure and Protect the land assets | BCDC | 2014 | | Fence the property, Reconstruct damaged structure, land transfer to County | BCDC, MBAC, Chamber, Conservation District, Museum |
| Park and Trail Development | B | Prioritize and Expand the Sidewalk and Trail system | BCDC | 2014-2019 | | <ul style="list-style-type: none"> • Create a trail survey • Prioritize long range development schedule • Manage sidewalk improvements | BCDC, WWC, MBAC, Parks and Rec Board, RPA |
| Tourism Development | A | Expand tourism services provided at the River and Lake | MBAC | 2014-2016 | | <ul style="list-style-type: none"> • Expand # of Docks available at Broadwater Bay, • Improve road to the Goosebay facility | BOR, Broadwater County, FWP. BCDC, Chamber, MBAC |
| Transportation | A | Promote safe and convenient corridors | MBAC | 2014-2019 | | <ul style="list-style-type: none"> • Promote replacement of Toston Bridge • Facilitate bridge replacement Hwy 12 – Deep Creek Canyon • Facilitate roadway widening efforts Hwy 287 | MDOT, BCDC, Chamber, MBAC |
| Natural Resource Development | B | Promote the Safe and Sustainable use of Resources | State Agencies | 2014-2019 | 100's | <ul style="list-style-type: none"> • Promote sustainable harvest of regional forest • Promote the extraction of minerals • Promote the conservation of water | Forest Service, Chamber, BCDC, MDEQ, Conservation District, MBAC |
| Niche Agriculture | B | Promote the expansion of Niche value-added agriculture markets that generate wealth | MSU-Ext | 2014-2019 | | <ul style="list-style-type: none"> • Look at mobile processing equipment • Find product/plants that flourish in the region micro climate | MSU-Ext, BCDC, MBAC, Conservation District |

Lewis and Clark Action Plan

| CEDS Strategy | Priority | Objective | Lead Agency | Time Frame | Jobs | Action Item | Resources |
|--------------------------------------|----------|---|---|------------|------|---|---|
| Redevelopment of impaired properties | A | Remediate and ready properties for higher economic development use | MBAC | 2014-2019 | | <ul style="list-style-type: none"> • Develop the Caird Property • Prioritize reuse of Brownfield List • Develop East Helena Business Park. | MDEQ, EPA, METG, MBAC, East Helena, L&C County |
| Aerospace Cluster | A | Develop an Internationally known Aerospace Cluster | Helena Airport Authority | 2014-2016 | | <ul style="list-style-type: none"> • Identify Core Competencies • Attract like Industries • Attract & develop Ancillary Industries | Helena Airport Authority, MBAC, Boeing. |
| Tourism Development | A | Expand services & opportunities provided | Chamber/CVB, Tourism Business Improvement District (TBID) | 2014-2019 | | <ul style="list-style-type: none"> • Expand biking options • Expand retail offerings • Expand experiential opportunities | BID, Chamber/CVB, TBID, City of Helena, Lincoln, MBAC |
| Transportation | C | Promote safe and convenient corridors | MDOT | 2014-2015 | | <ul style="list-style-type: none"> • Promote greater interconnectivity around airport • Facilitate expansion of rail loading options • Promote grade separation on North Montana | MDOT, Chamber, MBAC, City of Helena |
| Natural Resource Development | B | Promote the Safe and Sustainable use of Resources | State agencies | 2014-2019 | | <ul style="list-style-type: none"> • Promote sustainable harvest of regional forest • Promote the extraction of minerals • Promote the conservation of water | Firms, and county and state agencies and MBAC |
| Defensible Spaces | C | Develop defensible spaces in the Urban – Forest Interface | Tri-County FireSafe working group | 2014-2019 | | <ul style="list-style-type: none"> • Develop standards that meet fire requirements | Tri-County FireSafe, City of Helena, L&C County, Developers |
| Education & Training | A | Strive to create a well-educated and motivated populace and work force | Helena College | 2014-2019 | | <ul style="list-style-type: none"> • Identify regional needs • Promote programs that are effective | Helena College, Carroll College, School Districts, Chamber, MBAC, Job Service |
| Fairground Expansion | B | Further develop the facility that meets and exceeds the needs of the region | Lewis & Clark County Fairground board | 2014-2019 | | <ul style="list-style-type: none"> • Develop a expansion schedule • Promote the benefits • Secure a funding source | Fair board, Chamber/CVB, TBID, MBAC, MSU-Ext |
| Growth Policy Update | A | Update the growth policy to reflect key issues including: 1) water availability, 2) wastewater disposal, 3) roads, 4) fire protection | Lewis and Clark County | 2014-2019 | | <ul style="list-style-type: none"> • Survey community • Clarify and simplify the policy • Protect economic growth and quality of life | City and County Planning |

Meagher County Action Plan

| CEDS Strategy | Priority | Objective | Lead Agency | Time Frame | Jobs | Action Item | Resources |
|------------------------------|-----------------|--|---|-------------------|-------------|---|--|
| Develop Growth Policies | A | Develop Growth Policies that reflect the rural and independent nature of the community with consideration for a proposed new mine. | MBAC | 2014 | | <ul style="list-style-type: none"> • Develop a revised Growth Policy • Prioritize land use objectives • Identify service boundaries | City of WSS, Meagher County, MBAC, Chamber |
| Remediate Community Blight | B | Improve White Sulphur Springs downtown and housing. | MBAC | 2014-2019 | Dozens | <ul style="list-style-type: none"> • Analyze needs. • Identify and apply for funds for downtown development including infrastructure. • Expand capital resources to businesses and homeowners. | MBAC, City of WSS, Meagher County, MT Main Street Program. |
| Tourism Development | B | Expand services & opportunities provided | Chamber | 2014-2019 | | <ul style="list-style-type: none"> • Expand biking options • Expand retail offerings • Expand recreational opportunities | Chamber, MBAC, City of Helena, Martinsdale, Montana Mainstreet, Russell County |
| Transportation | C | Promote safe and convenient corridors | MDOT | 2014-2017 | | <ul style="list-style-type: none"> • Facilitate reconstruction opportunities of Hwy 12 • Promote streetscape beautification | MDOT, Chamber, MBAC, City of WSS |
| Natural Resource Development | A | Safe and Sustainable use of Resources | Tintina Resources, MT Department of Environmental Quality, MBAC | 2014-2017 | 300+ | <ul style="list-style-type: none"> • MBAC assist in planning for development of a new copper mine. | Tintina Resources, county and state agencies and MBAC. |

MBAC

Evaluation

Our organizational performance is continually evaluated by the numerous state and federal agencies that have entrusted our District with performance responsibilities relative to the proper management of their specific programs. These evaluations include, but are not limited to, financial audits, regularly scheduled reporting obligations, and frequent communication with the respective agencies. As a matter of course, the Montana Business Assistance Connection Board of Directors is responsible for evaluating and reporting CEDS “Action Plan” progress. The Board will continue to comply with all EDA reporting requirements. Our District’s effectiveness is also evaluated on an ongoing basis by our Board of Directors and CEDS committee via staff communication on the progress of current projects. Project updates occur through such means as our Board of Director’s meetings, personal contacts, meetings of member entities, MBAC’s newsletters, as well as the EDA Annual Report and CEDS update. The status of activities and progress on objectives, including achievement of goals, will be reviewed at each quarterly Board of Director’s meeting. A “Project Evaluation” chart, updated by MBAC staff for each Board meeting, corresponds specifically to projects in progress and outlines the project’s title, its CEDS category, financial partners, funding levels, and anticipated date of completion. A chart detailing “Completed Projects” to date is also provided. While activity will be ongoing, the evaluation of progress will be done at the Board of Director’s meetings.

Performance Measures

Performance measures will be tied directly to the long-term economic development goals as previously identified in this document. The following criteria will be used to measure our performance as an Economic Development District (EDD).

The level and frequency of participation by government, business, and community leaders in projects, including Board and CEDS committee meetings.

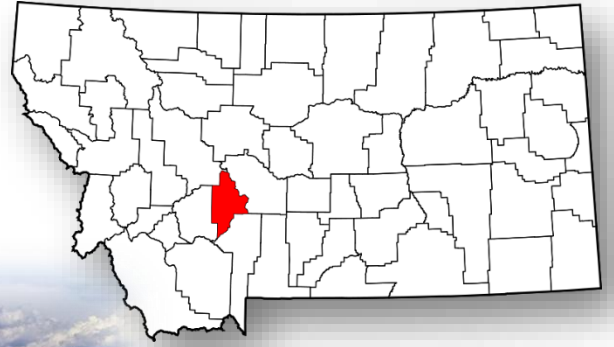
The level at which we comply with all EDA Planning and Technical Assistance grant award and administrative conditions.

The level and frequency to which District staff interacts with communities in the region to provide assistance towards identified infrastructure deficiencies.


The level at which we meet the criteria established by the Montana Department of Commerce’s Certified Regional Development Corporation Program.

Number of jobs created or retained per project.

The amount and types of funding leveraged per project.



Broadwater County



The background image shows a tall water tower with a globe on top and an American flag. Below it is a dark stone war memorial with gold lettering. The memorial has two main sections: the top one says 'IN HONOR OF THE MEMBERS OF ALL WARS FROM BROADWATER COUNTY' and the bottom one is titled 'BROADWATER COUNTY WAR DEAD' and lists names under 'W W I' and 'W W II'.

| | |
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OVERVIEW

Broadwater County was created February 9, 1895, taking the Missouri River valley portions of Jefferson and Meagher Counties. This was an attempt to make everyday life more efficient for the 4,000 people of the valley. Commerce and legal required a long trek over mountain ranges to the county seats in White Sulphur Springs or Boulder. This division was made possible by hard work of the then State Senator Gordon Watt and Lieutenant Governor A. E. Spriggs. Newly

created Broadwater County included 1,238 square miles of the headwaters of the Missouri River basin.

The region was first explored by the Lewis & Clark – Corps of Discovery on July 24, 1805 with well-known locations still visible including the Crimson Bluffs, Yorks Islands, and the Little Gates of the Mountains. Gold was discovered in the region on Confederate Gulch in 1864, creating a gold boom to the region. 580,550 ounces of placer gold was removed from this mining district alone. At today's prices, this district produced \$775 million dollars of gold, most being recovered over 5 years.



The region grew consistently from the early days with mining, logging, and agriculture dominating the economy. In 1883, the Northern Pacific Railroad created the rail-stop that became Townsend, the county seat when Broadwater County was formed.

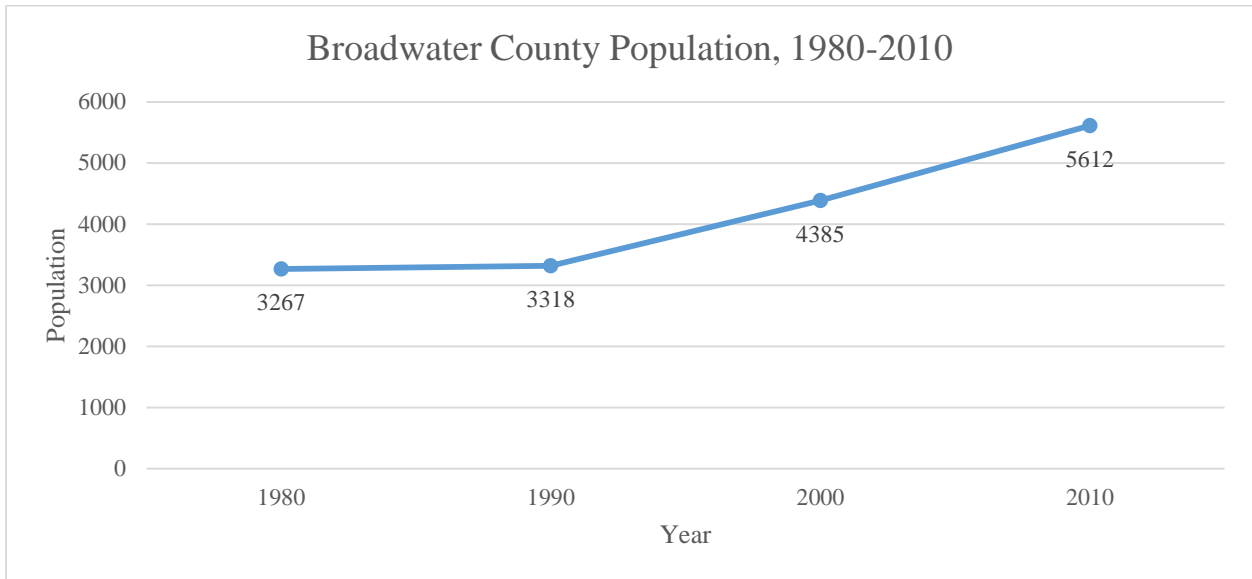


In 1940, the Toston Dam was completed on the Missouri River with an accompanying irrigation canal that brought much needed water to the fertile soils of the basin miles to the north. The dam was retrofitted in 1989 with a 10 MW run-of-the-river hydroelectric generation plant.

In 1954 the Canyon Ferry Dam was completed on the Missouri River, creating Canyon Ferry Lake which dominates Broadwater County. The hydroelectric unit has an installed capacity of 50 MW. The filling of the lake, displaced the town of Canton. Today many of the homes in Townsend had been moved from the Canton town site. The most notable home was that of A.B. Cook, a local cattle rancher. The home is now a local Bed and Breakfast.

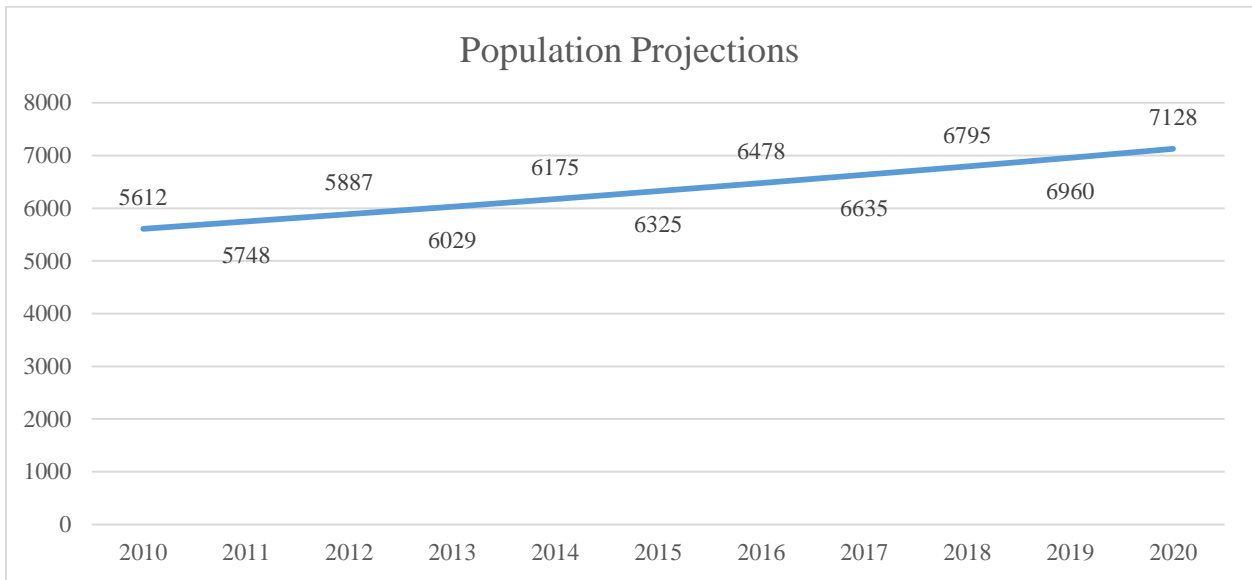
POPULATION

In 2010, the US Census Bureau determined the population of Broadwater County was 5,612. Broadwater County is strategically located between the cities of Bozeman and Helena. These urban regions boast populations of 92,614 and 63,395 respectfully. Due to this strategic location, from 1990 to 2010, Broadwater County experienced a rapid population growth of 69%, averaging a 2.8% annual growth rate.



Sources: US Bureau of the Census--Montana Population of Counties by Decennial Census: 1900 to 1990; U.S. Census Bureau, Census 2000; U.S. Census Bureau, 2010 Census

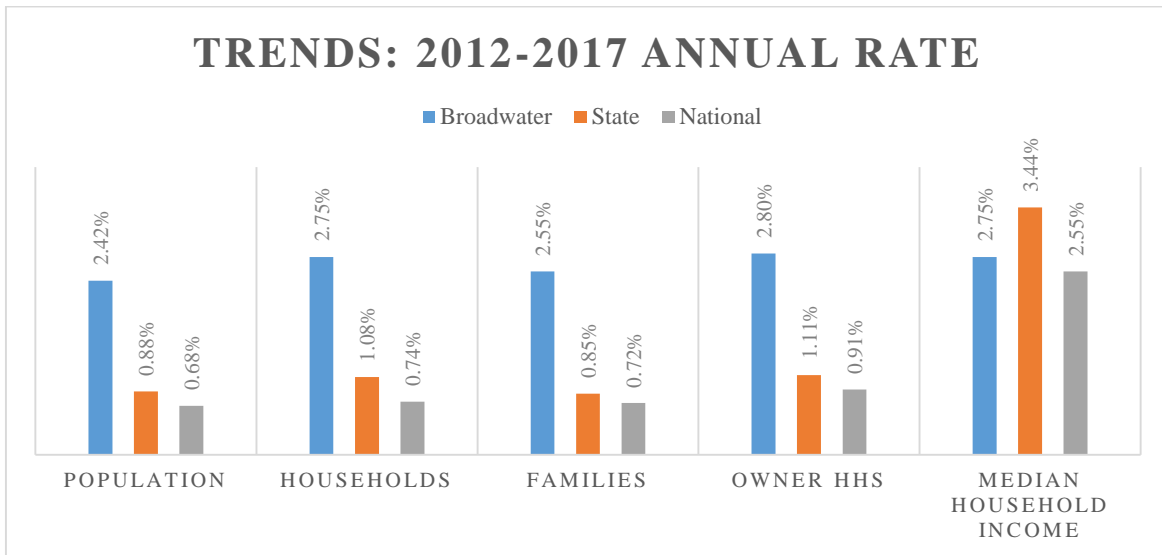
Looking forward, the 5 year growth projections in Broadwater County look to continue at a rapid rate. By the year 2020, the population is projected to have grown more than 25%.



Source: Esri Business Analysis

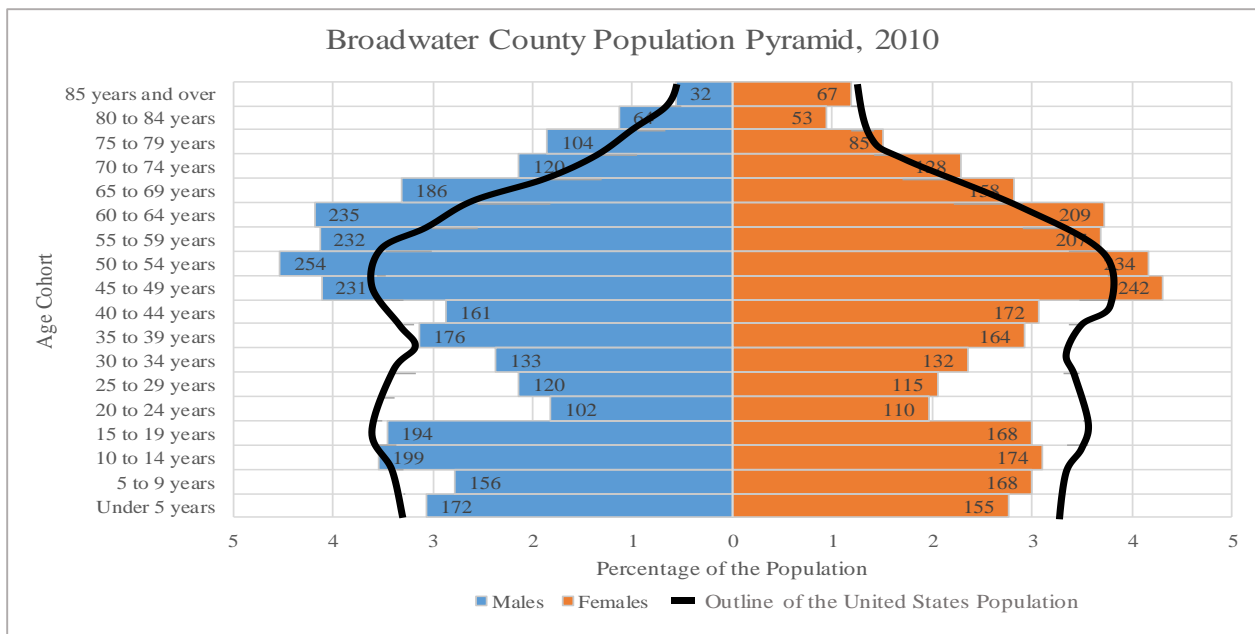
Growth in Broadwater County is occurring primarily outside of the city limits of Townsend. During the previous 20 years, rural sub-development growth had been extensive with an excess of 2,000 lots available for development.

Comparing Broadwater County to the State of Montana and the United States projections shows that growth rates will continue at faster than average, except for the Median Household Income that will lag state averages.



Source: Esri Business Analysis

The population pyramid for the County tells a common story playing out in rural communities. The median age in 2012 was 45.9 years of age and the community is expected to continue to grey with a projected median age in 2017 being 47 years of age. Young workers leave the county to find jobs or attend higher education.



Source: U.S. Census Bureau, 2010 Census

Economy – Private Sector

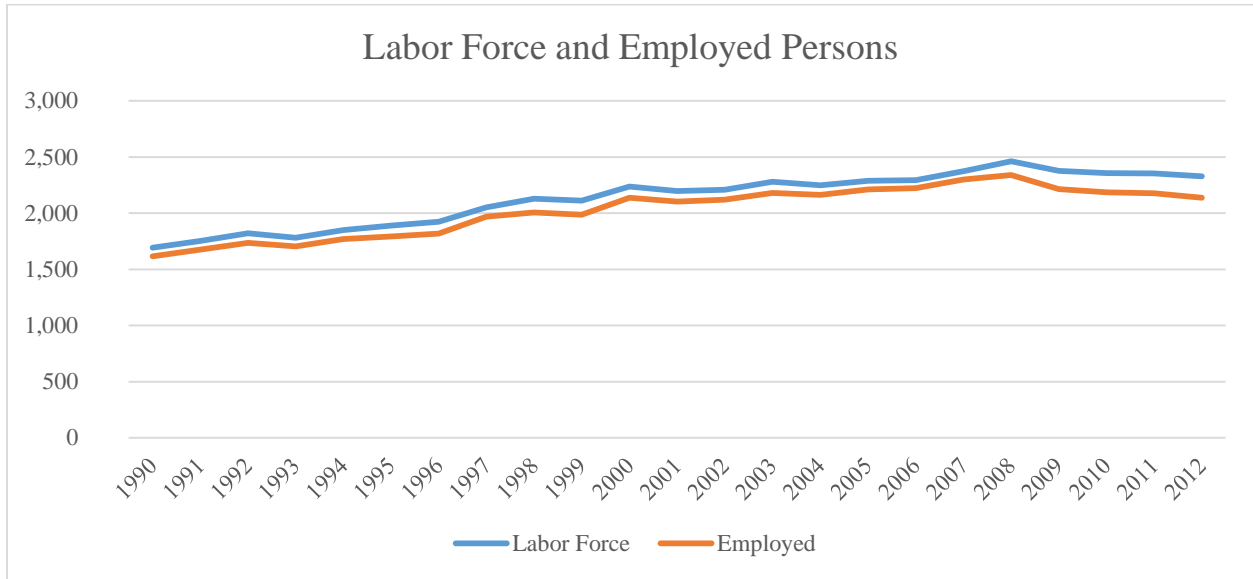
The Cost of Living index for Broadwater County (*City-Data.com, in March of 2012*) was scored at 88.1 as compared to a national average of 100, indicating that it is generally less expensive to live in Broadwater County. The US Census Bureau’s Small Area Income and Poverty Estimates (SAIPE) program determined for Broadwater County in 2012, 702 residents (12.3%) of Broadwater County were living in poverty and 223 (18.2%) of those residents were under the age of 18.

The economy of the region has historically been driven by commodity prices. The economy has been driven around mining, logging and agriculture as seen by the top 5 employers to the region. But with the installation of Canyon Ferry Dam and the resulting reservoir, the community has experienced an increase in tourism and recreation related businesses.

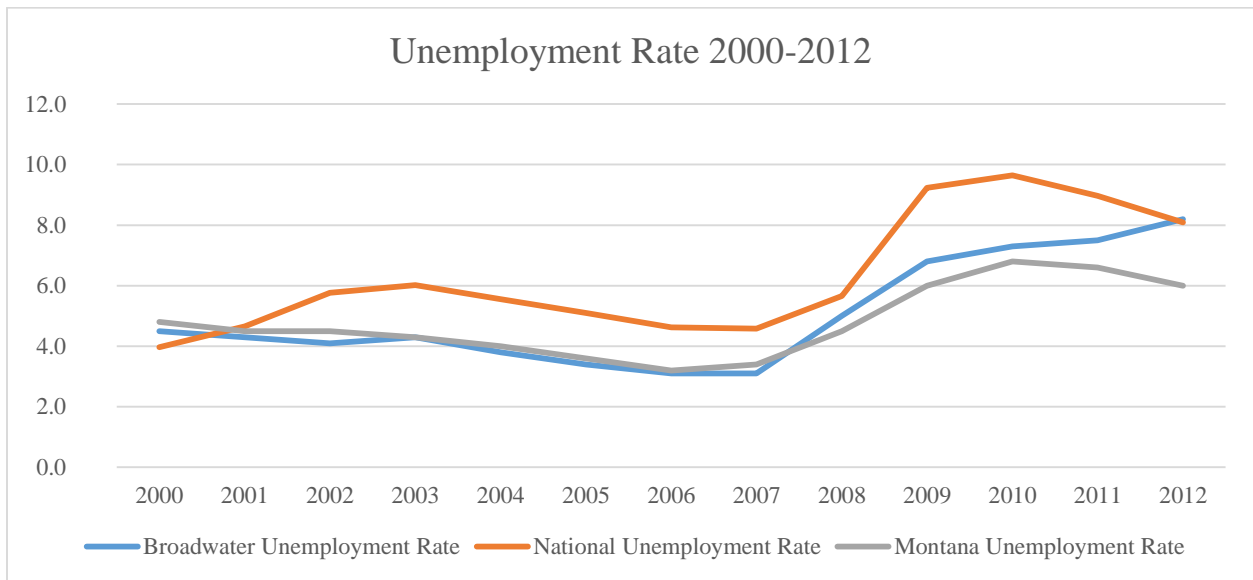
In recent years, the region’s proximity to Helena and Bozeman has driven an increase in a commuter class of professionals that live in the region, but work in the more urban locations. The regions central location within the state has also driven an increase in sales and service related business such as Watsons Irrigation.

| Top Private Employers in Broadwater County Based on 2nd quarter 2011 data | |
|---|------------|
| Business Name | Size Class |
| RY Timber | 6 |
| Wheat Montana Bakery | 6 |
| Broadwater Health Center | 5 |
| Bob's Supermarket | 4 |
| Graymont Western US Inc. | 4 |
| Employment Size Class Coding: Class 6 = 100 - 249; Class 5 = 50 - 99; Class 4 = 20 - 49 | |

EMPLOYMENT



Source: Bureau of Labor Statistics

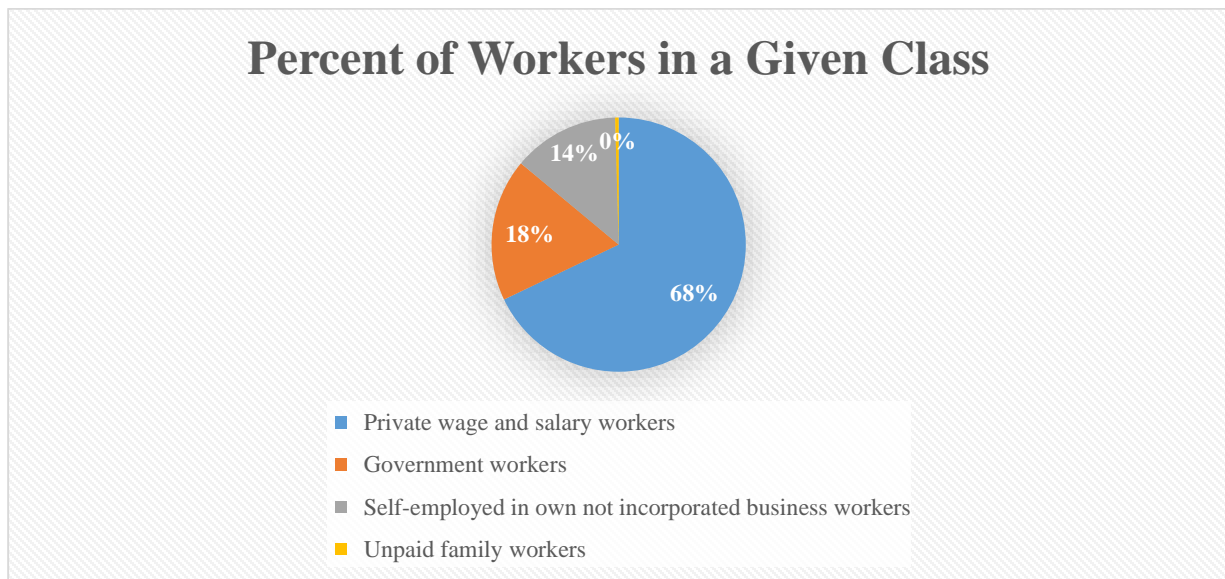


Source: Bureau of Labor Statistics

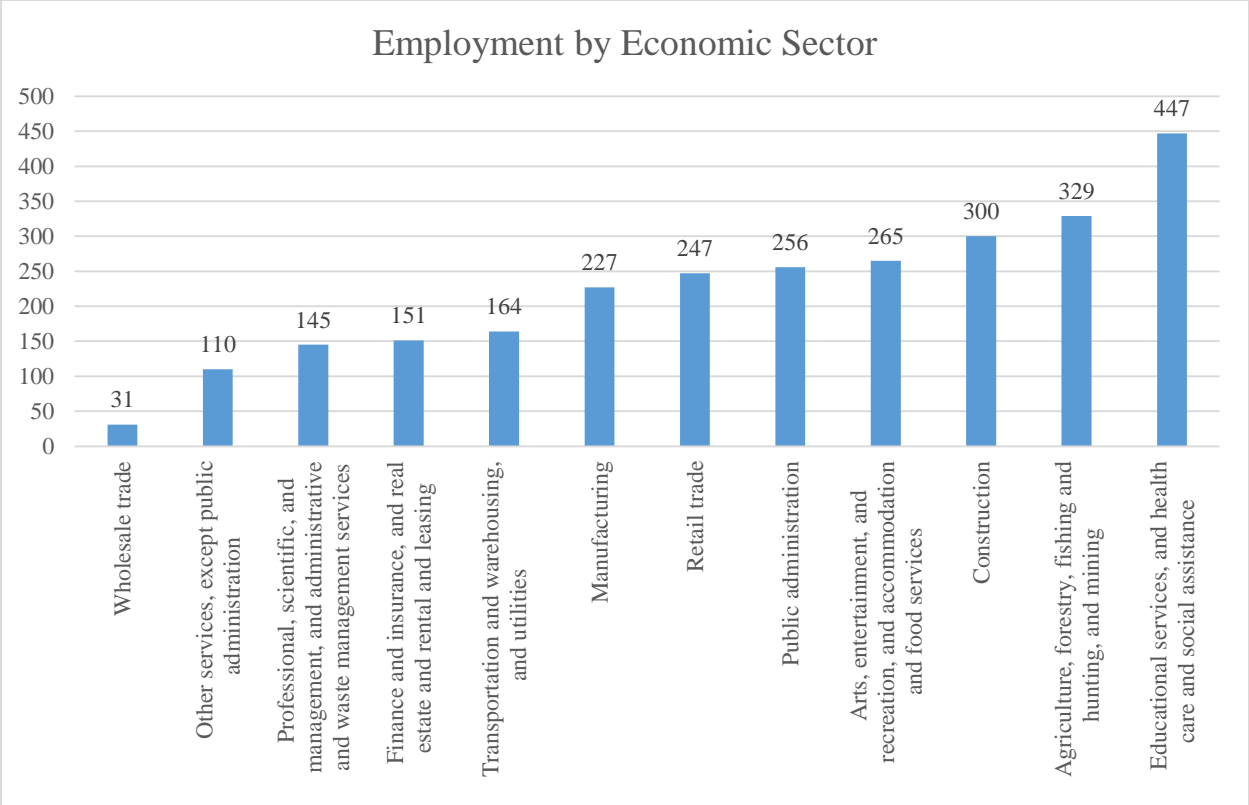
ESTIMATED EMPLOYMENT BY ECONOMIC SECTOR, 2010



Source: US Census Bureau



Source: US Census Bureau



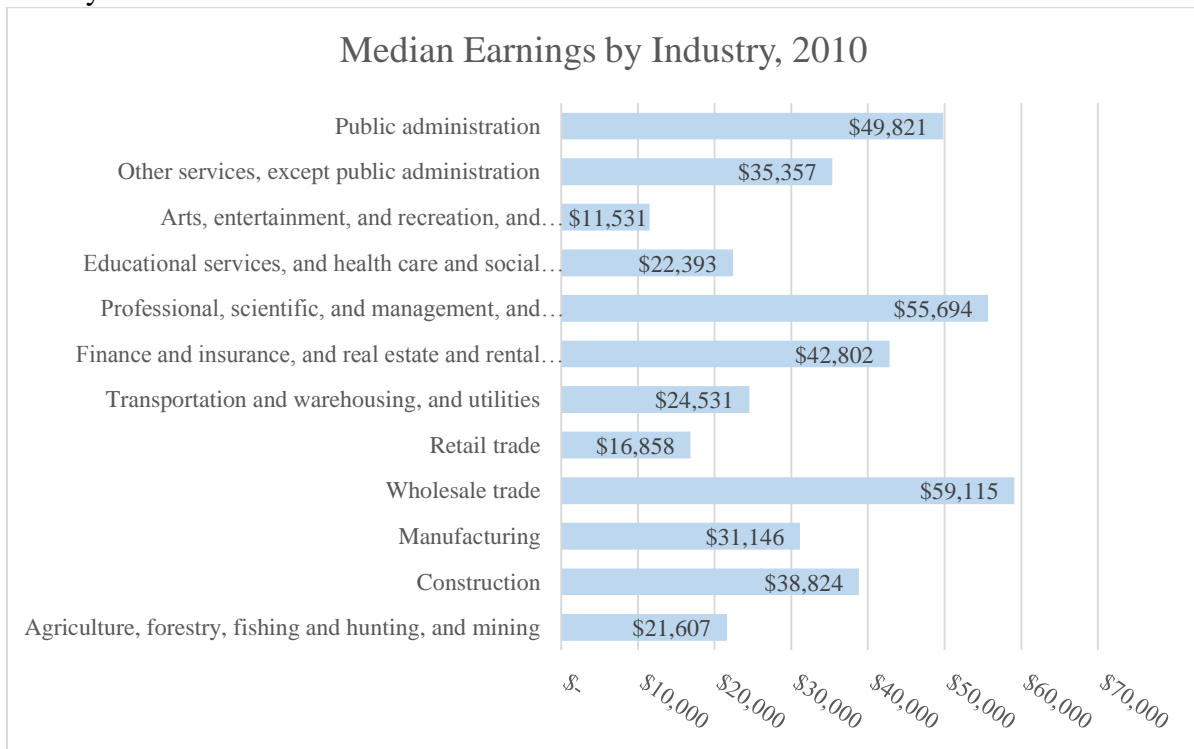
Source: U.S. Census Bureau, 2008-2012 American Community Survey

The table below lists the location quotients (with 1 or higher) by industry for Broadwater County. The quotient is derived by dividing the number of jobs in an industry by the total number of jobs in Broadwater County. That number is then compared to the same ratio for the national level. A score of 1 or more indicates an industry employs more persons than the national level, meaning that the industry is profitable in the area and exports products.

| Location Quotients calculated from Quarterly Census of Employment and Wages Data | | | |
|--|-------------------|--|-------------------|
| Industry | Broadwater County | Industry | Broadwater County |
| Base Industry: Total, all industries | 1 | NAICS 713 Amusements, gambling, and recreation | 1.06 |
| NAICS 112 Animal production and agriculture | 13.8 | NAICS 721 Accommodation | 1.14 |
| NAICS 238 Specialty trade contractors | 1.42 | NAICS 722 Food services and drinking places | 1.25 |
| NAICS 441 Motor vehicle and parts dealers | 2.13 | NAICS 811 Repair and maintenance | 1.93 |
| NAICS 444 Building material and garden supply stores | 2.06 | Location Quotient: Ratio of area industry employment to total area employment divided by the same ratio for the nation. A number greater than 1 indicates a regional export industry. The larger the number the greater the export strength. | |

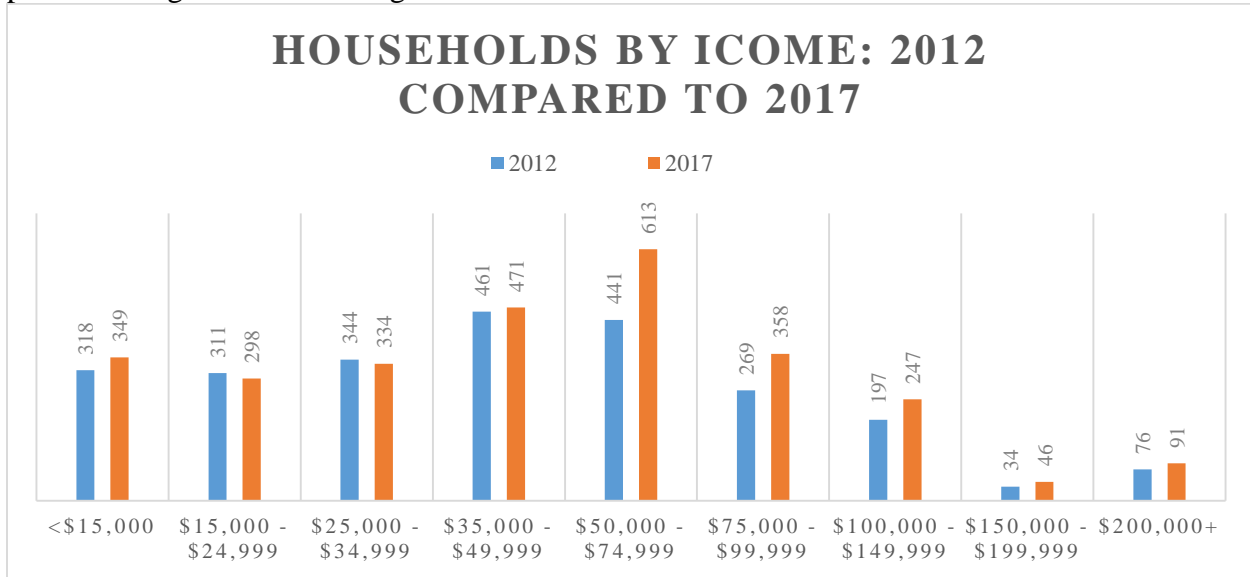
MEDIAN EARNINGS BY INDUSTRY

The following bar chart displays the median annual earnings for each industry in Broadwater County:



Source: U.S. Census Bureau, 2008-2012 American Community Survey

In Broadwater County for the year 2012, the median household income was \$41,850 with an average household income of \$57,090. By 2017, the median household income is expected to grow to \$47,941 with the average household income increasing to \$62,878. This shows that the region is gaining ground as compared to the national median average, going from 83.44% to 84.26% of national averages. The following graph depicts the projected change in number of persons in a given income range:

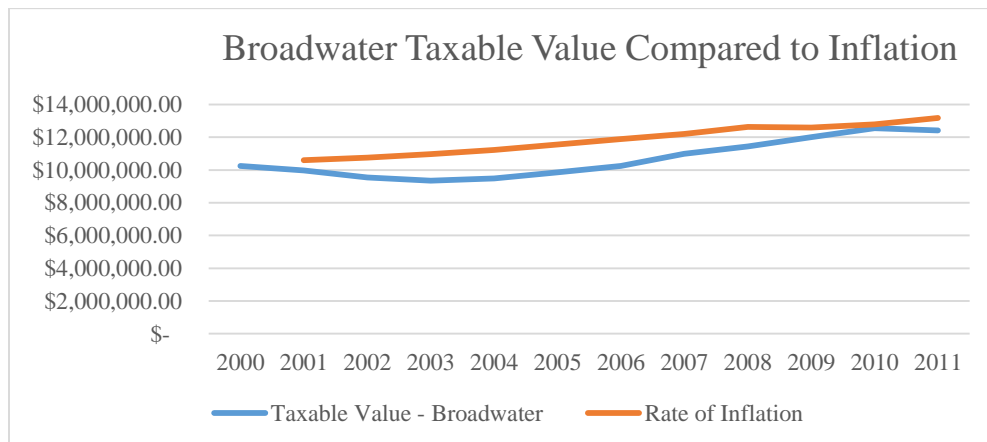


Source: Esri Business Analysis

ECONOMY – PUBLIC SECTOR

TAXABLE VALUE AND GOVERNMENT SPENDING

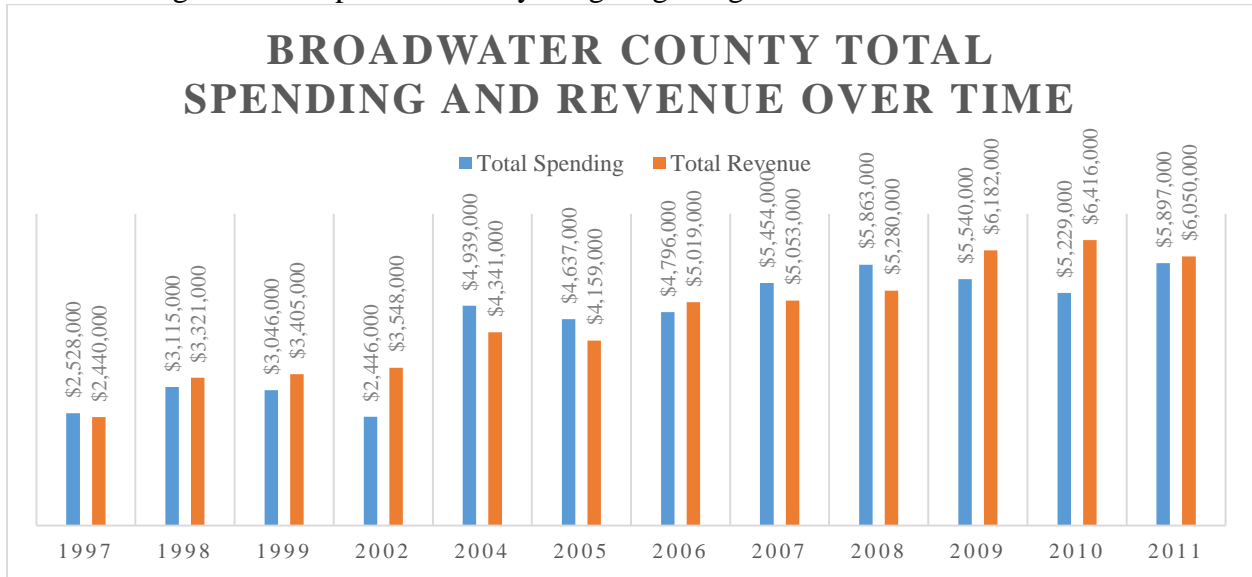
The following graph shows the change in taxable value for Broadwater County from 2000-2011. The blue line depicts the taxable value and the orange line depicts inflation over that same time period.



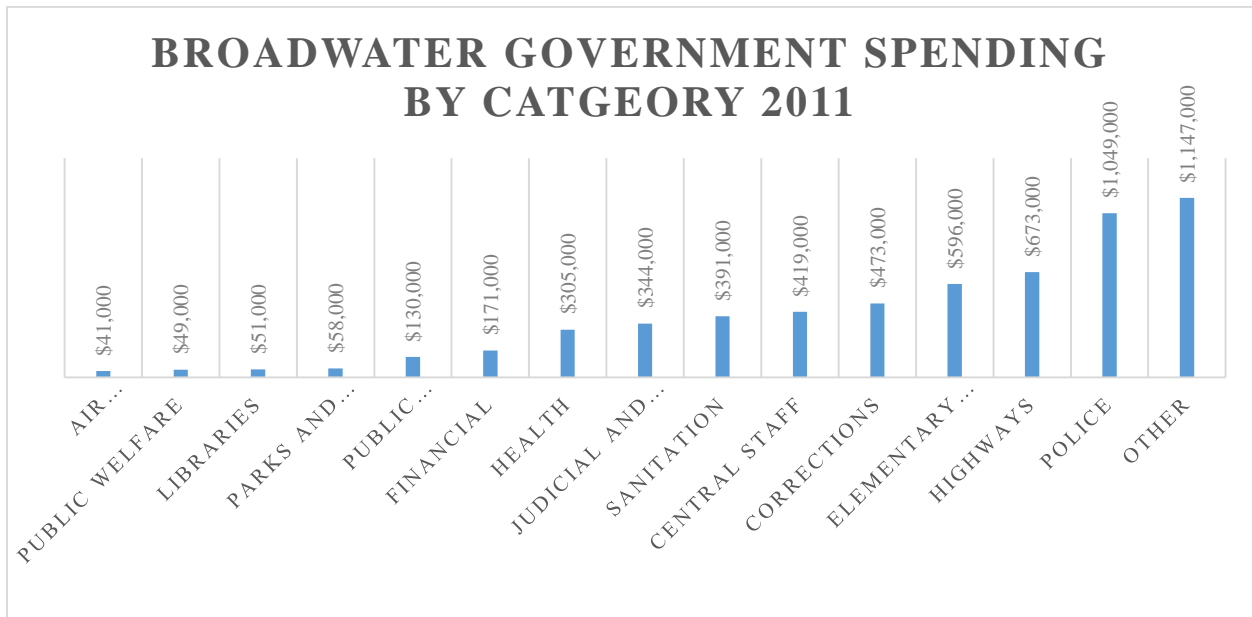
Source: The Montana Tax Foundation

As demonstrated in the above graph, the taxable value of Broadwater County is increasing near the same rate as inflation over the past 12 years. This makes it more likely that the County can keep up with inflationary costs that are associated with providing services.

The following 5 charts depict the County budgeting categories and costs of services.

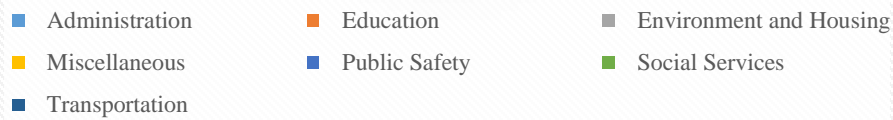
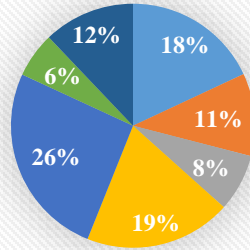


Source: US Census Bureau



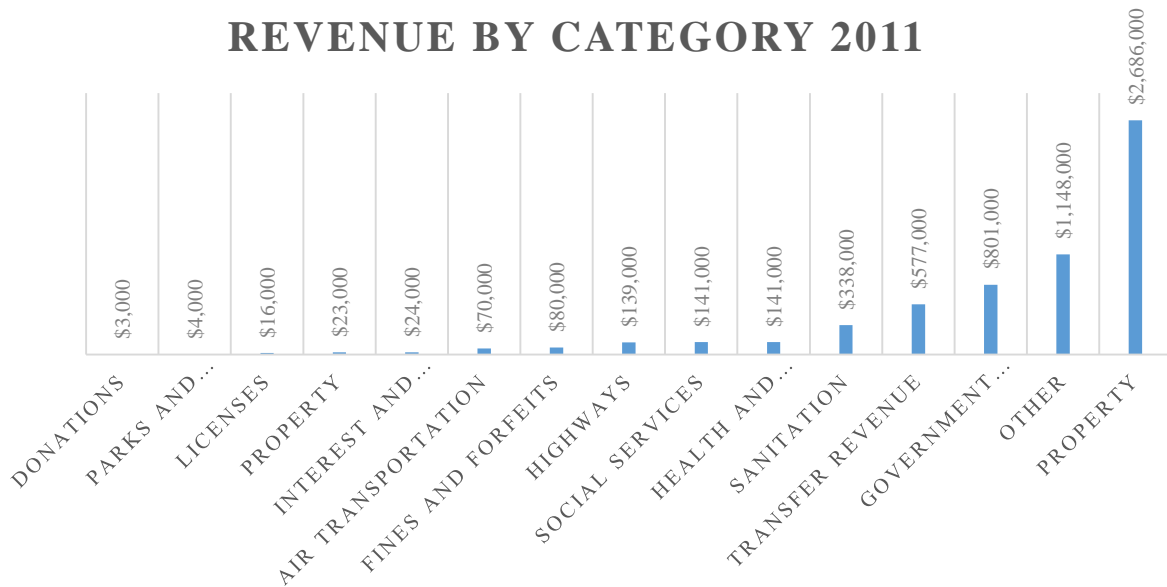
Source: US Census Bureau

Broadwater Government Spending By Category 2011 (%)



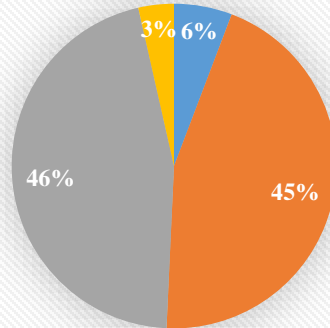
Source: US Census Bureau

REVENUE BY CATEGORY 2011



Source: US Census Bureau

Broadwater Government Revenue By Category 2011 (%)



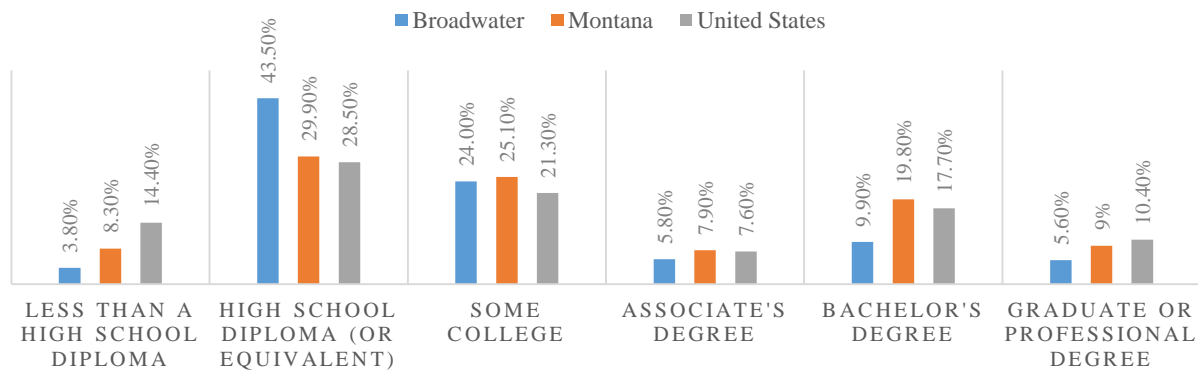
■ Environment and Housing ■ Miscellaneous ■ Taxes ■ Transportation

Source: US Census Bureau

EDUCATION

The chart below displays the highest level of education attained by persons aged 25 and older.

HIGHEST LEVEL OF EDUCATIONAL ATTAINMENT (POPULATION 25 YEARS AND OLDER)



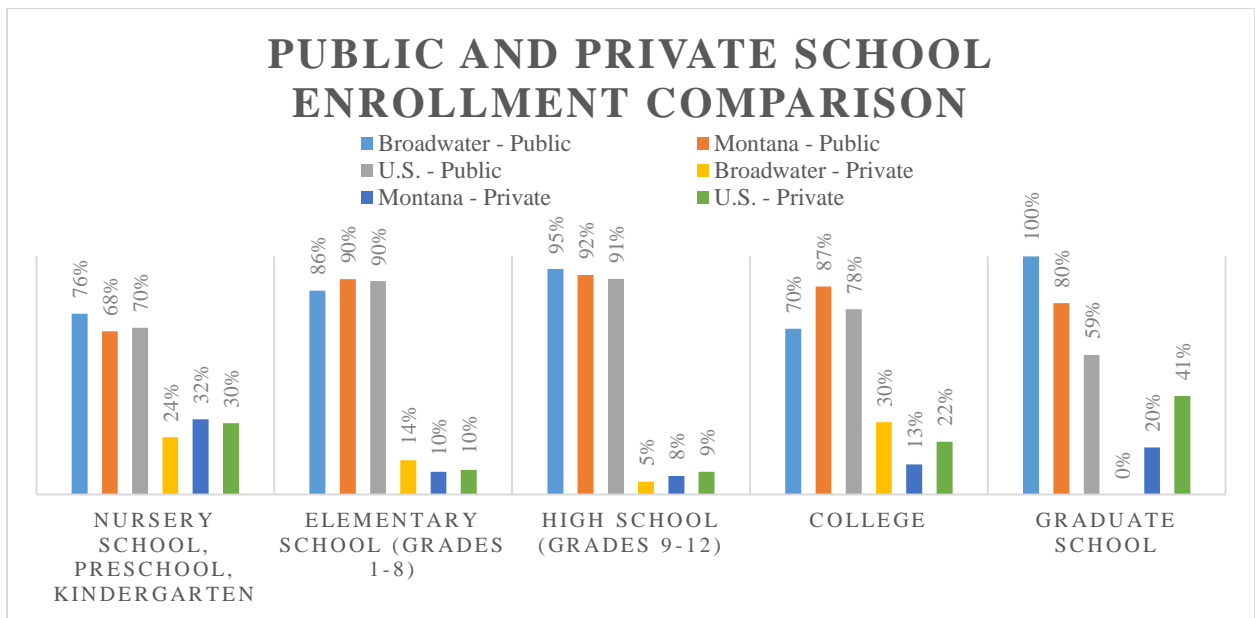
Source: U.S. Census Bureau, American Community Survey 2010 (US & MT), and 2005-2009 estimates (county)

As the above chart shows, the percent of persons over the age of 25 in Broadwater County with less than a high school diploma (3.8%) is much lower than the Montana overall average (8.3%) as well as the United States (14.4%). The County is above average in percentage of persons with

a high school diploma (or equivalent) and maintains with averages of persons with some College or an Associate’s degree. The area is lacking Bachelor’s or higher education.

There is one school in Broadwater County. The school is located in Townsend. The elementary school (Cecelia Hazelton) teaches grades K-8 and has an enrollment of 351 students. The elementary school employs 7 teachers - 2 for each grade except for 2nd—and 20 classrooms. Broadwater High School has an enrollment of 247 students and employs 9 teachers. The high school has 14 classrooms. 6 of the faculty members are shared between the elementary school and high school.

| School Name | City | Number of Students | Female Students | Male Students | Female - Male Student Ratio |
|-------------------------|----------|--------------------|-----------------|---------------|-----------------------------|
| Cecelia Hazelton School | Townsend | 351 | 155 | 196 | 0.79 |
| Broadwater High School | Townsend | 247 | 112 | 135 | 0.83 |
| Townsend 7-8 | Townsend | 120 | 56 | 64 | 0.88 |



Source: US Census American Community Survey 2008-2012

To learn more about the education system in Broadwater County, visit their website at: [www.http://townsendps.schoolwires.com](http://townsendps.schoolwires.com)

HEALTH, MEDICAL, AND EMERGENCY SERVICES

LAW ENFORCEMENT

Broadwater County Sheriff's Department

The Broadwater County Sheriff's Department employs 8 full-time officers, 2 part time deputies, the sheriff, 13 full-time control officers and 2 part time officers. The department also provides law enforcement to Townsend through an inter-local agreement.

FIRE PROTECTION

City of Townsend V.F.D.

Broadwater County Rural Fire District

Broadwater County has two fire protection agencies: The City of Townsend V.F.D., and Broadwater County Fire District V.F.D. County fire halls are located in Winston, Duck Creek, Toston and Radersburg. In total, Broadwater County has 3 structure trucks, 8 tenders, 8 brush trucks and 51 volunteer fire personnel. There are 7 dry hydrants in the county, as well as 17 locations designated for water withdraw from canals, river or lakes.

HOSPITAL AND NURSING HOME

Broadwater Health Center

The Broadwater Health Center, located in Townshend, offers both inpatient and outpatient services to all of Broadwater County. Inpatient services are fully able to address typical hospitalization needs, including both acute hospitalization and recuperative stays. Outpatient services include Laboratory, Radiology (X-ray), and Physical Therapy. Broadwater Health Center has 18 beds and an emergency room that is open 24-hours a day. The ER is staffed by Registered Nurses with a Doctor, Nurse Practitioner, or Physician Assistant on call. Broadwater Health Center is serviced by 2 MDs, 3 PAs, and 2 physical therapists.

EMERGENCY MEDICAL Broadwater County Disaster and Emergency Service

In Broadwater County, there are 14 licensed EMT's and 2 ambulances to provide emergency medical services to the residents.

MUNICIPAL SERVICES

| Community Infrastructure Systems | |
|---|---|
| Townsend | |
| Water | Groundwater Supply |
| Wastewater | 3-Cell partially mixed aerated Lagoon with quiescent cell |
| Power | Overhead/Underground Northwestern Energy |
| Natural Gas | Underground Propane Service |
| Traffic | Rural |
| Railroad | Montana Rail Link |
| Airport | Townsend Airport |

Townsend is supplied with drinking water by a combination of three wells. The town’s water system is gravity driven from a water tower and distributes its water to the 1,878 residents through a system of PVC, copper and steel piping. The system holds 250,000 gallons of fire reserves in a water tower and has fire service hydrants evenly spaced on two block intervals around town.

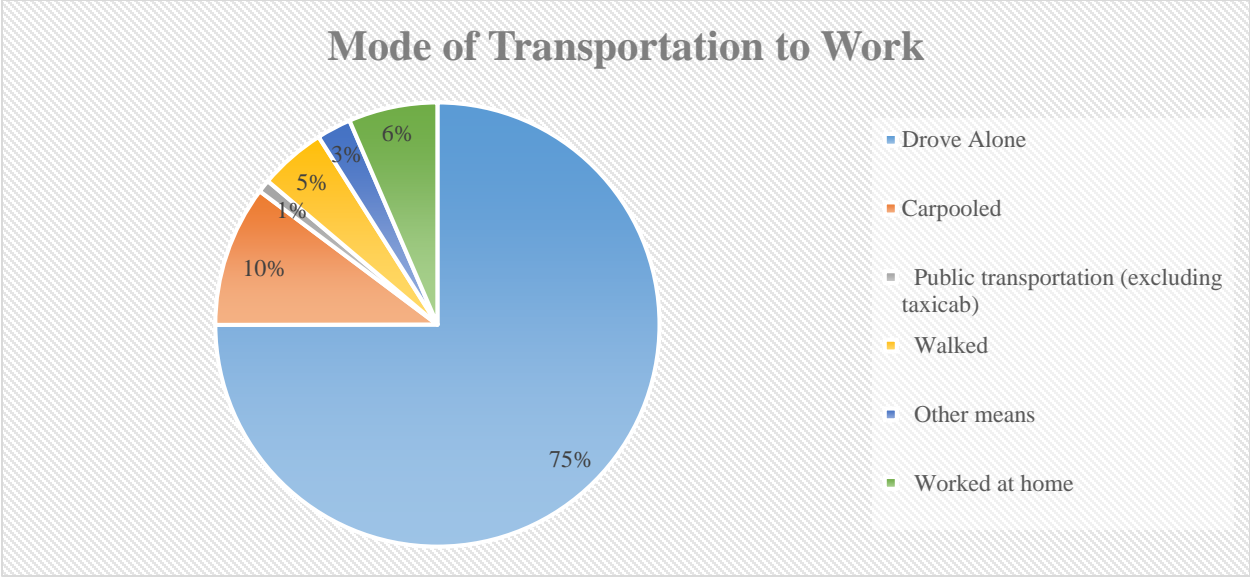
UTILITIES

Electric Utilities are provided by Northwestern Energy and Vigilante Electric. Propane is distributed in the City of Townsend by Northwestern Energy. Rural locals receive propane from Amerigas, and Montana Energy Alliance. Heating Oil is distributed by Rocky Mountain Supply.

Natural Gas is not available.

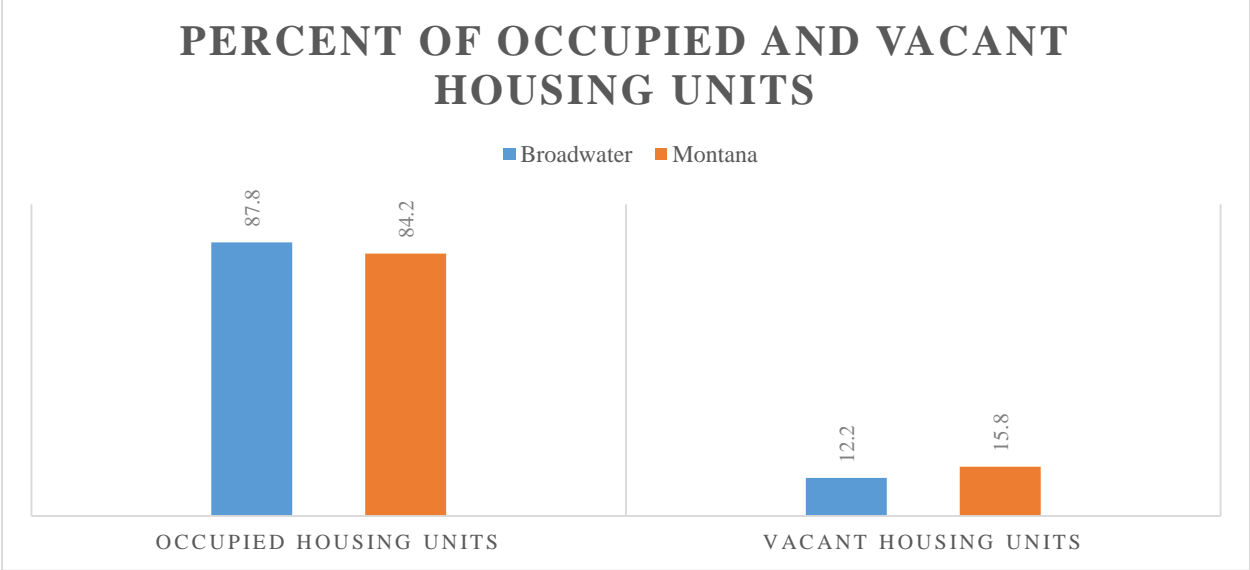
TRANSPORTATION

Transportation throughout the region is provided by Montana highways, County and City roads and streets. There is a County paved airfield east of Townsend. The facility has aviation gas, but not jet fuel. Interstate highway I-90 crosses the south end of the County and Montana Rail Link provides rail service in Broadwater County, with daily service 5 days a week.



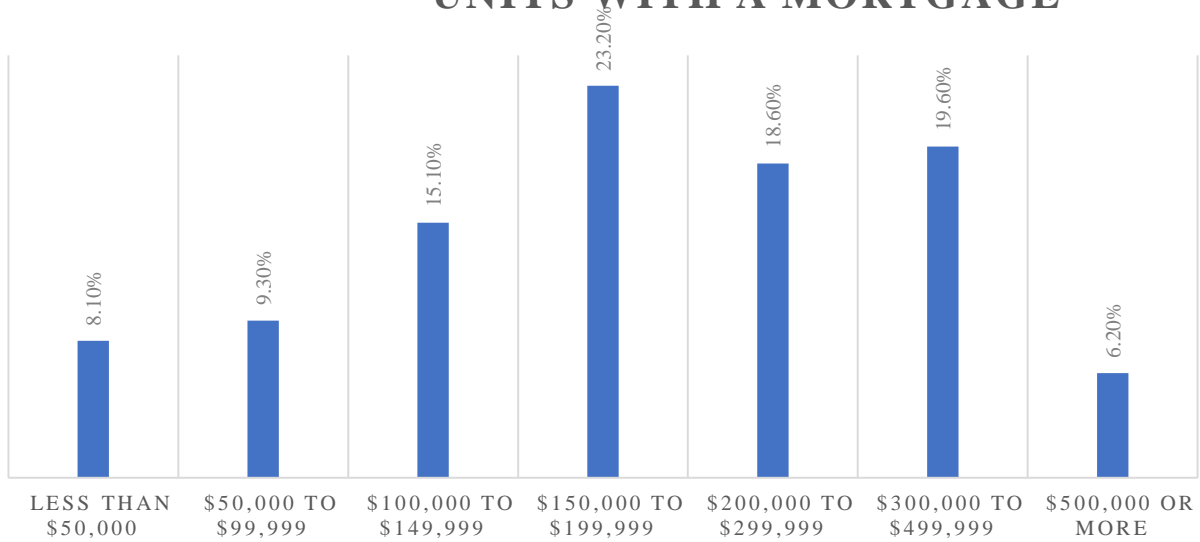
Source: US Census Bureau

HOUSING STOCK AND CHARACTERISTICS



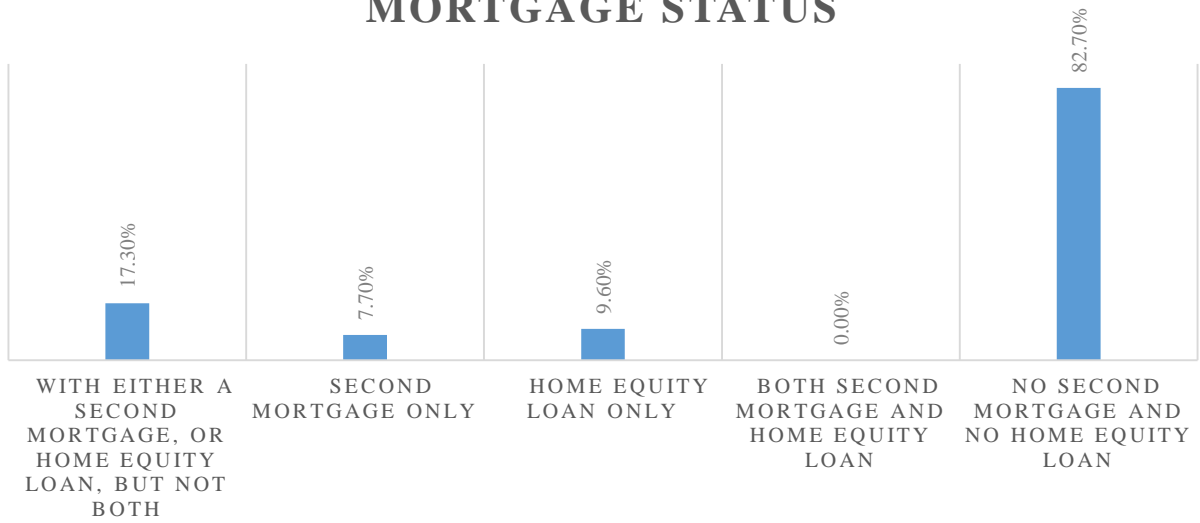
Source: US Census Bureau

VALUE OF OWNER-OCCUPIED HOUSING UNITS WITH A MORTGAGE

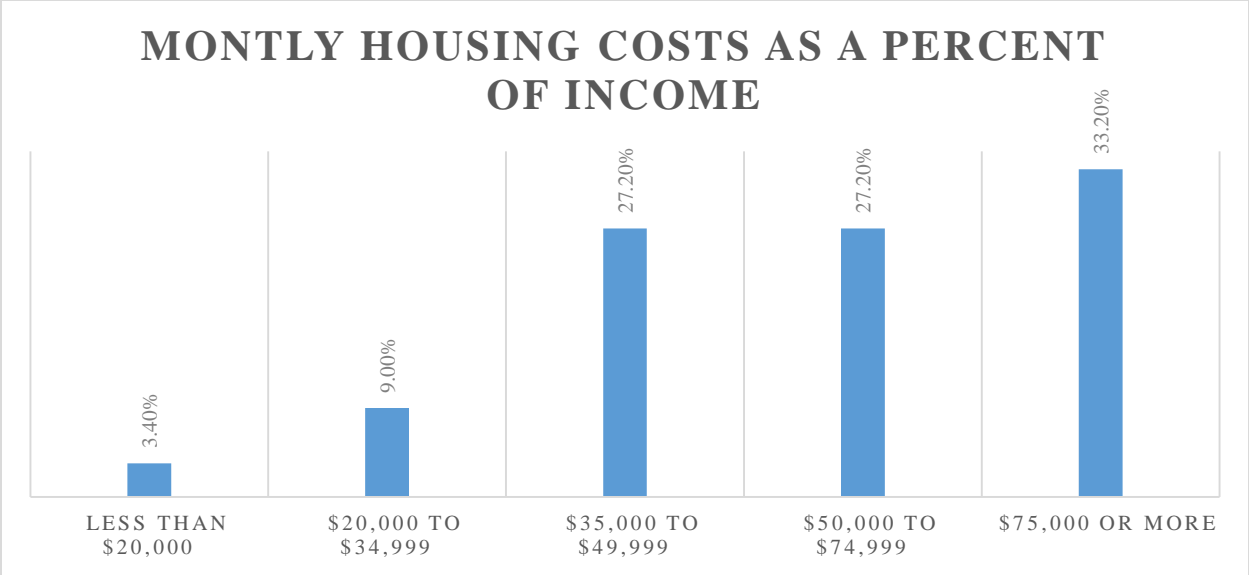


Source: US Census Bureau

MORTGAGE STATUS



Source: US Census Bureau



Source: US Census Bureau



Source: US Census Bureau

The following table shows the percentage of houses that were built in each 10-year period:

| YEAR STRUCTURE BUILT | Percentage |
|----------------------|------------|
| 2010 or later | 0.00% |
| 2000 to 2009 | 19.40% |
| 1980 to 1999 | 31.80% |
| 1960 to 1979 | 21.20% |
| 1940 to 1959 | 7.60% |
| 1939 or earlier | 19.90% |

SOURCE: US CENSUS 2010

AGRICULTURE

| AGRICULTURAL STATISTICS FOR BROADWATER COUNTY | | | |
|--|-------------|-------------|----------|
| | 2007 Census | 2002 Census | % Change |
| FARMS | | | |
| Farms: (number) | 302 | 279 | 8% |
| Land in farms (acres) | 474892 | 469782 | 1% |
| Average size of farms (acres) | 1572 | 1684 | -7% |
| Median size of farms (acres) | 233 | 400 | -42% |
| Farms by size: (number) | | | |
| Less than 1,000 acres | 210 | 195 | 8% |
| 1,000 acres or more | 92 | 84 | 10% |
| Farms by value of products sold: (number) | | | |
| Less than \$100,000 | 242 | 217 | 12% |
| \$100,000 or more | 60 | 62 | -3% |
| Farms by type of organization: (number) | | | |
| Family, Individual, Partnership | 262 | 265 | -1% |
| Corporation, Cooperative, Trust | 40 | 14 | 186% |
| LIVESTOCK INVENTORY AND CROPS HARVESTED | | | |
| Livestock and Poultry Inventory (number) | | | |
| Cattle and calves | 20078 | 18555 | 8% |
| Hogs and pigs | | 238 | |
| Horses and ponies | 980 | 826 | 19% |
| Chickens (layers and broilers) | 575 | | |
| Crops Harvested (acres) | | | |
| Wheat for grain, All | 34125 | 37268 | -8% |
| Winter wheat for grain | 12093 | 9054 | 34% |
| Spring wheat for grain | 22032 | 26905 | -18% |
| Durum wheat for grain | 0 | 1309 | -100% |
| Oats for grain | 352 | | |
| Barley for grain | 3723 | 5377 | -31% |
| Hay, haylage, grass silage | 26989 | 34088 | -21% |
| OPERATOR DEMOGRAPHICS | | | |
| Primary occupation: (number) | | | |
| Farming | 171 | 185 | -8% |
| Other | 131 | 94 | 39% |
| Place of residence: (number) | | | |

| | | | |
|--|------|------|------|
| On farm operated | 247 | 242 | 2% |
| Not on farm operated | 55 | 37 | 49% |
| Years on present farm: (number) | | | |
| Less than 10 years | 85 | 103 | -17% |
| 10 years or more | 217 | 176 | 23% |
| Age group: (number) | | | |
| Under 55 years | 113 | 148 | -24% |
| 55 years and over | 189 | 131 | 44% |
| Average age of operators: (number) | 58.5 | 55.4 | 6% |
| Source: US Department of Agriculture | | | |

NATURAL RESOURCE AND ENVIRONMENTAL ISSUES

With the exception of Townsend wastewater system the majority of the wastewater in Broadwater County is disposed of through individual private septic systems. As the population of Broadwater County grows there are areas where the concentration of wastewater systems may be impacting the groundwater supply.

Broadwater County has been a producer of timber for the Lumber industry for many years. RY Timber maintains lumber mills both Townsend and in Livingston, producing stud grade lumber. In recent years it has proven to be very difficult to source timber from federal lands. Private land owners with forested properties have been managing their properties and selling timber into regional mills. An epidemic of Pine Bark Beetle as well as other invasive species have infested the forested regions in the County. Much of the affected timber has not been harvested, and at this time is no longer viable for use as saw logs.

Mining has been a historic industry in Broadwater County. Currently Graymont Western operates a Limestone Quarry and processing facility, producing hydrated lime and quick lime. In 2013 Graymont received a revised operating permit to extend the life of the quarry and invested extensively in the rail based load out facility.

Historically the region is well known for placer gold on the west slopes of the Big Belt Mountains, Copper, Gold and Silver in the Elkhorn Mountains. The entire region has many other shows of mineralization.

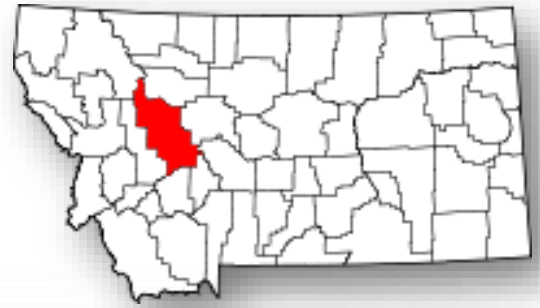
Natural Resources of other note in the region are large deposits of lime in the north of the County near McMasters, limestone base construction marble at the southern end of the Limestone range and a deposit of Thorium nodules in Duck Creek.

For an interactive map of known mineral deposits in Broadwater County, follow this link to the MBAC website. From this site you can gain access to layers that are used in Google Earth and identify historic deposits with associated known data.

www.MBAC.biz/Mineralization.php

Historic mining districts in Broadwater County:

| | |
|---|----------------------------|
| http://www.deq.mt.gov/abandonedmines/linkdocs/30tech.mcp | Confederate Gulch District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/33tech.mcp | Lone Mountain District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/32tech.mcp | Magpie Gulch District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/35tech.mcp | Park/Hassel District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/36tech.mcp | Radersburg District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/37tech.mcp | Winston District |

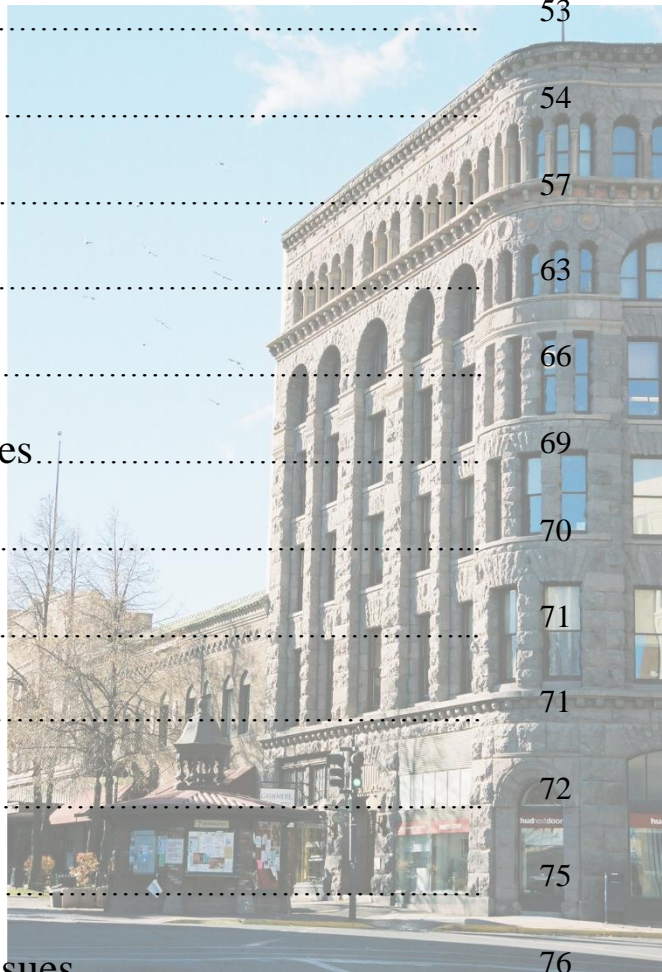


EAST HELENA
CITY POOL



Lewis and Clark County

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Overview

Lewis and Clark County was created in 1864 within the Montana Territory, originally called Edgerton County after the first Territorial Governor Sidney Edgerton. The region was renamed Lewis and Clark County in 1868 after the Lewis and Clark expedition. The Corps of Discovery first came thru the region in July of 1805 with great wonder at the Gates of the Mountains.



Fur trappers founded a small trading outpost in 1840, in the Canyon Creek region, north of Helena. Later, on July 14, 1864 the City of Helena was founded with the discovery of placer gold deposits in present day Last Chance Gulch, by the Four Georgians. On October 30, 1864 the local population authorized the layout of the streets, and chose the name Helena.

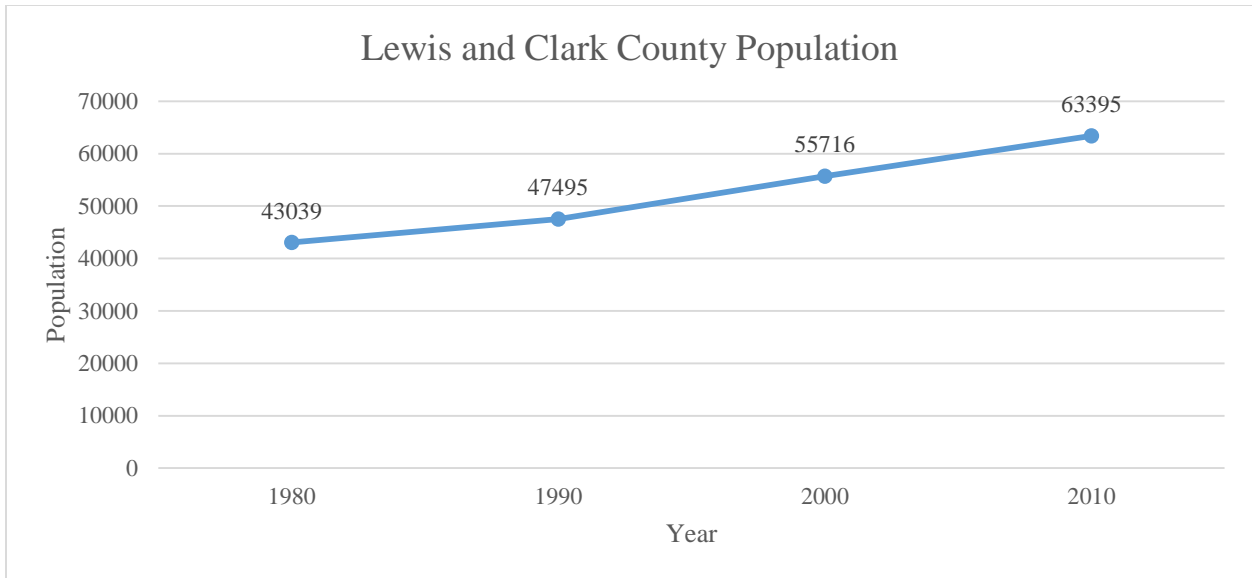
The region grew quickly, spurred on by placer gold mining which transitioned into Lode tunnel mining. Agriculture sprang up quickly in the river valleys to supply goods to the mining communities in the region. Investors and businessmen took root in Helena making it the financial, political and cultural center of Montana. In 1875, Helena was made the capital of the Montana Territories and by 1883, the Northern Pacific railroad had reached the bustling community, with the Great Northern soon following. By 1890, the City of Helena had become well known as a “civilized” community with a streetcar system that stretch from the State Nursery in the west to the smelting facility in the east. Many thought that Helena would become one of the great cultural communities that would rival Denver and San Francisco. The “Silver Panic” of 1893, brought those aspirations to a close.



The Lewis and Clark County region is a contrast of urban development in the south around Helena, to the wild remoteness of the Bob Marshall Wilderness in the north. The County, covering a distance of 110 miles.

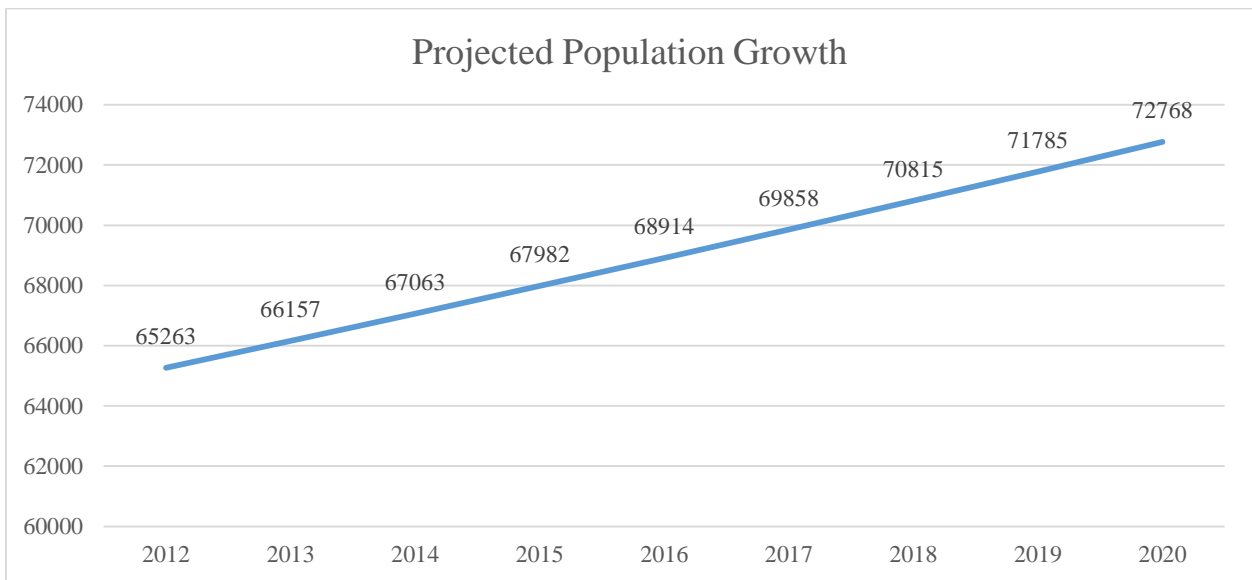
Population

In 2010, the US Census Bureau determined the population of Lewis and Clark County was 63,395. The city of Helena (28,190 people) is the County seat and Capital of the State of Montana. The Helena region is centrally located within the populous region of western Montana with a total population of 428,000 people living within 2 hours of the capital.



Sources: US Bureau of the Census--Montana Population of Counties by Decennial Census: 1900 to 1990; U.S. Census Bureau, Census 2000; U.S. Census Bureau, 2010 Census

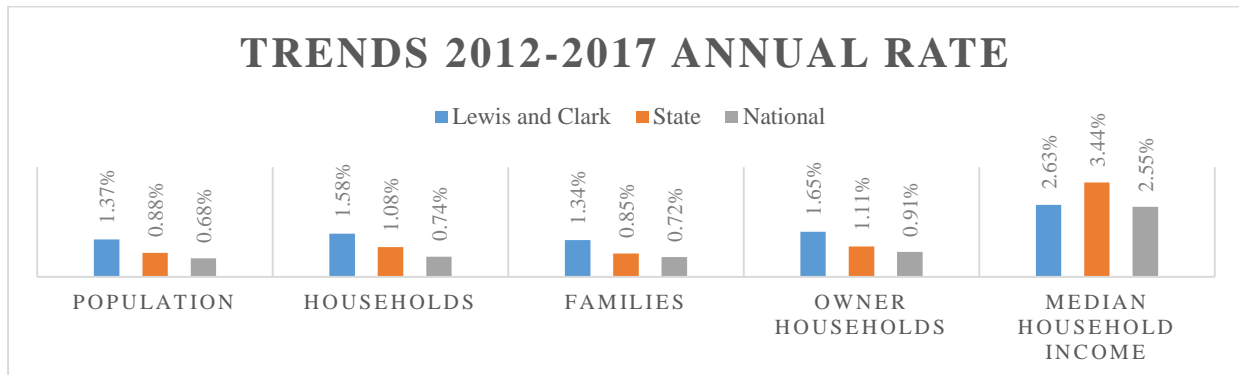
Looking forward, the 5-year growth projections in Lewis and Clark County look to continue at a consistent rate.



Sources: Esri Business Analysis

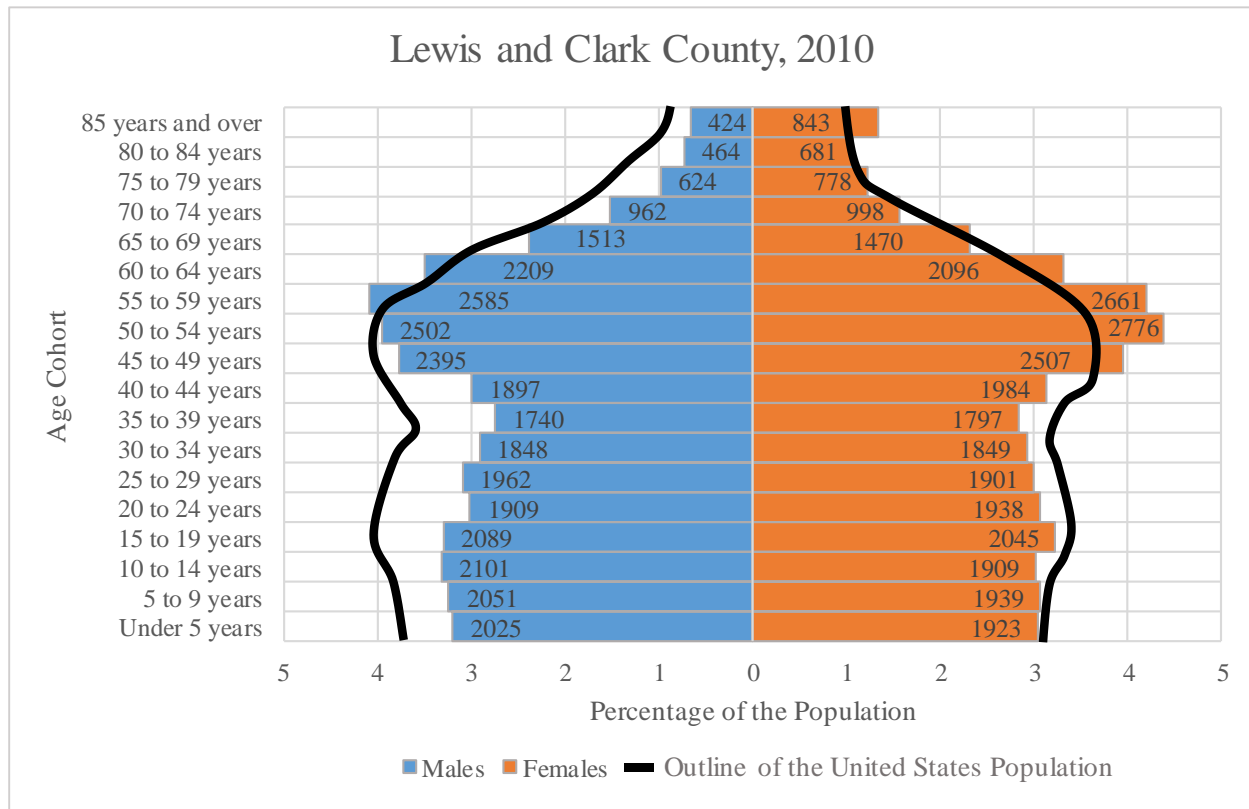
Growth in Lewis and Clark County is primarily occurring in and around the City limits of Helena.

Comparing Lewis and Clark County to the State of Montana and the United States projections shows that growth rates will continue at faster than average, except for the Median Household Income that will lag state averages



Source: Esri Business Analysis

The population pyramid for the County shows a pattern more closely following US norms but still showing an outmigration of youth from the ages of 20-44 years of age. The median age in 2012 was 41.3 years of age with an expected median age in 2017 being 42.1 years of age.



Source: US Census Bureau

Economy – Private Sector

The Cost of Living index for Lewis and Clark County, (*City-Data.com, in March of 2012*) was scored at 87.9 as compared to a national average of 100, indicating that it is generally less expensive to live in Lewis and Clark County.¹ The US Census Bureau’s Small Area Income and Poverty Estimates (SAIPE) program estimates that in 2012, 7,101 residents (11.2%) of Lewis and Clark County were living in poverty, with 2,181 residents under the age of 18 (15.6%) living in poverty.

The economy of the region is distinctly government related. The Helena valley is buoyed by government employment and the service sector. The remainder of the county is driven by commodity prices, mostly beef, lamb, hay and wheat.

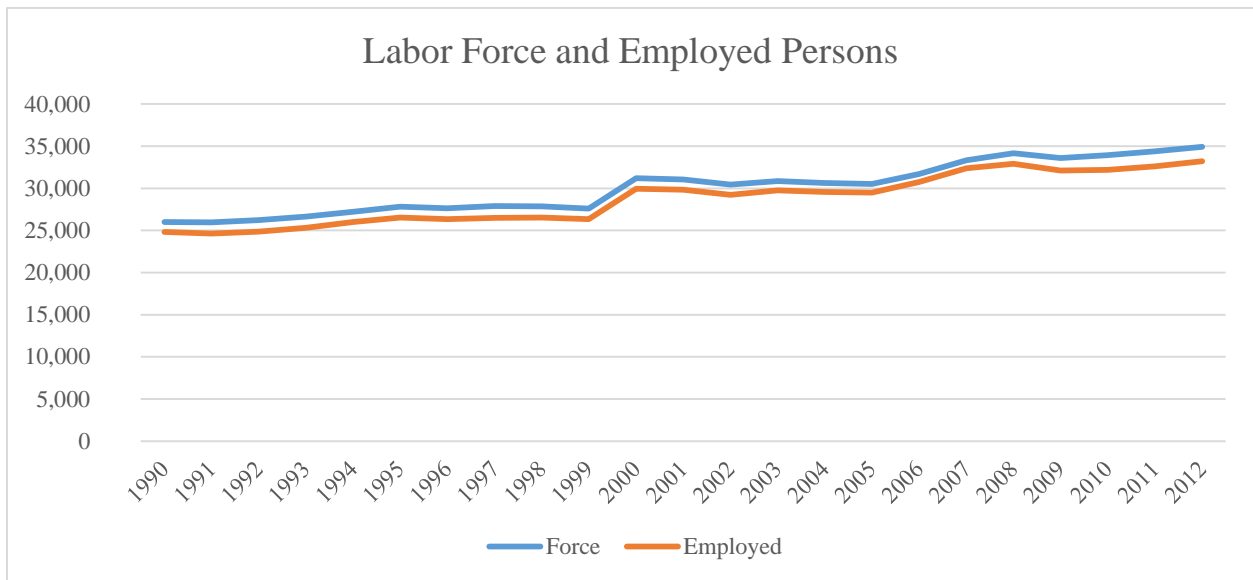
The top employers in the region, excluding government which is the largest employer, comprise a significant number of health related businesses, data management, not for profits, banks, engineering and an emerging aerospace manufacturing sector.

In 2012, Lewis and Clark County employed 7,000 individuals in the Public Administration category. Of unique importance, 43.3% of this workforce is aged 55 and older. As this workforce approaches retirement, significant pressure will be placed on the labor pool of the region.

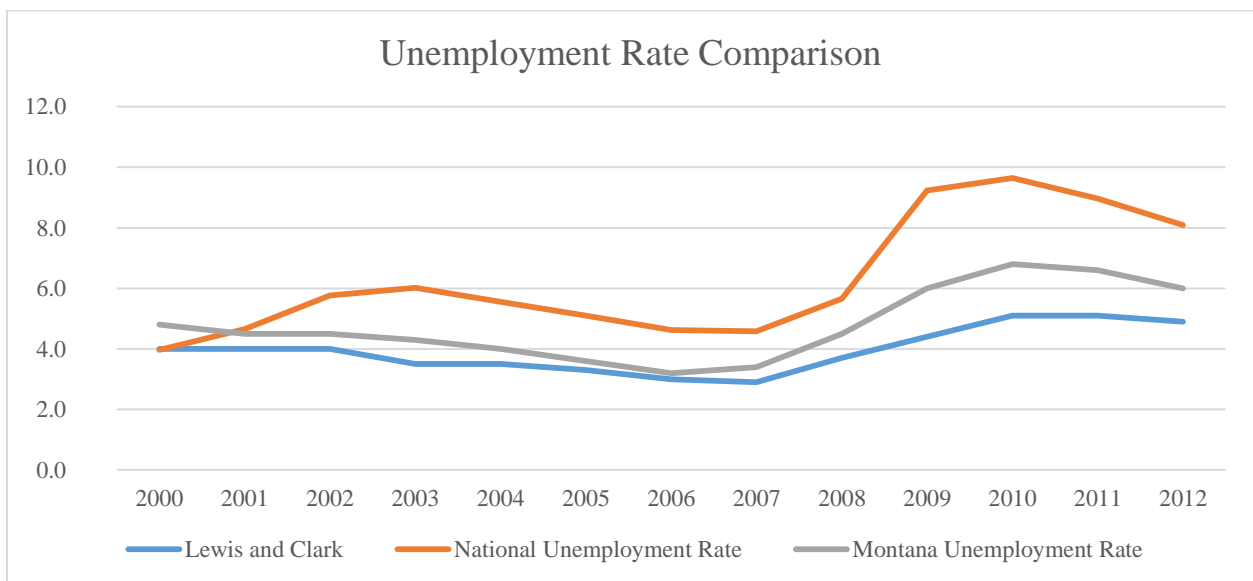
| Top Private Employers in Lewis and Clark County Based on 2nd quarter 2011 data | |
|---|------------|
| Business Name | Size Class |
| St. Peter's Hospital | 9 |
| Blue Cross/Blue Shield | 7 |
| Carroll College | 7 |
| Shodair Hospital | 7 |
| Wal-Mart | 7 |
| A2Z Staffing Solutions | 6 |
| Albertsons | 6 |
| Costco | 6 |
| Family Outreach | 6 |
| Helena Sand & Gravel | 6 |
| Intermountain Children's Home | 6 |
| McDonald's | 6 |
| Mountain West Bank | 6 |
| Charter (formerly Bresnan) | 6 |
| Rocky Mountain Development Council | 6 |
| Student Assistance Foundation | 6 |
| Boeing Company | 6 |
| Town Pump | 6 |
| Valley Bank | 6 |
| West Mont | 6 |
| Employment Size Class Coding: Class 9 = 1,000+ employees; Class 8 = 500 - 999; Class 7 = 250 - 499; Class 6 = 100 – 249 | |

¹ http://www.city-data.com/county/Lewis_and_Clark_County-MT.html

EMPLOYMENT



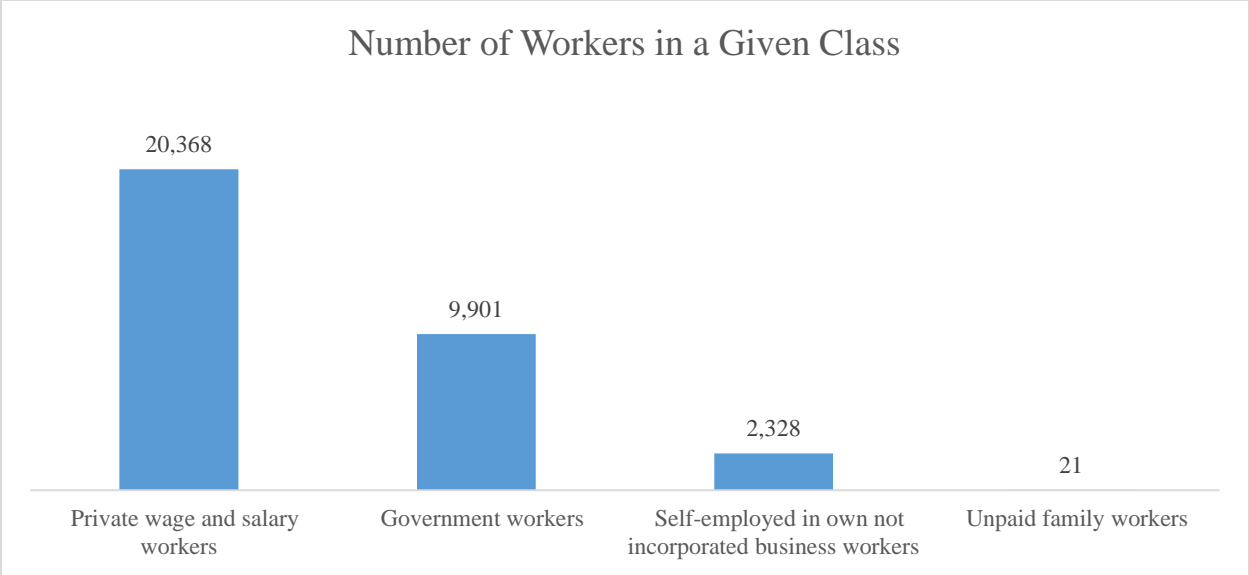
Source: Bureau of Labor Statistics



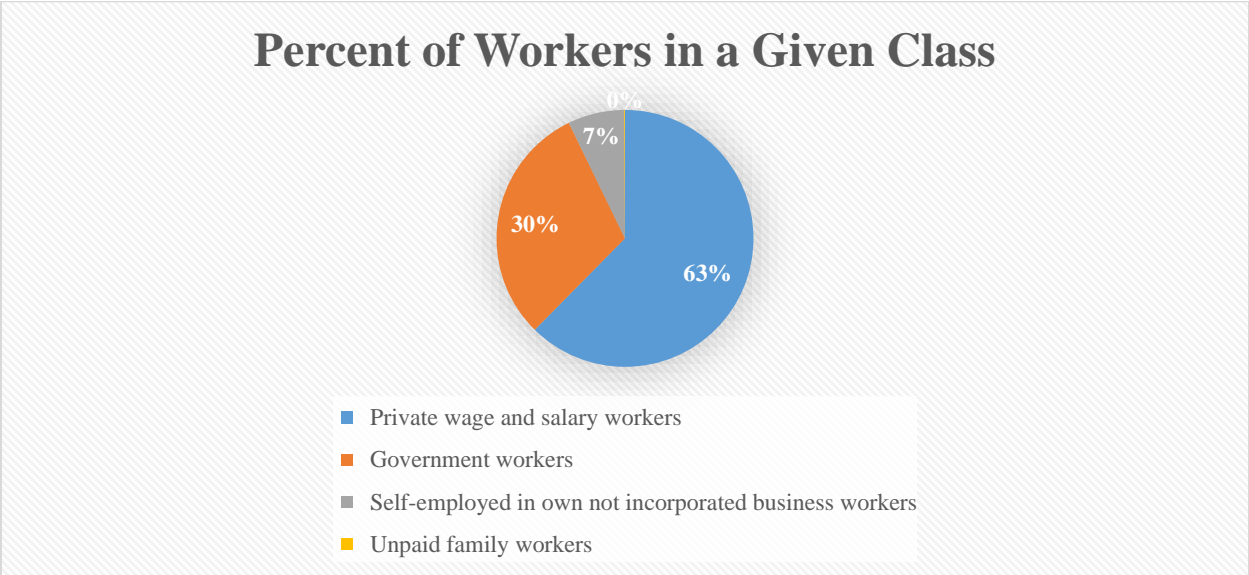
Source: Bureau of Labor Statistics

ESTIMATED EMPLOYMENT BY ECONOMIC SECTOR, 2010

The total civilian employed population, 16 years and older, in Lewis and Clark County is 20,368.

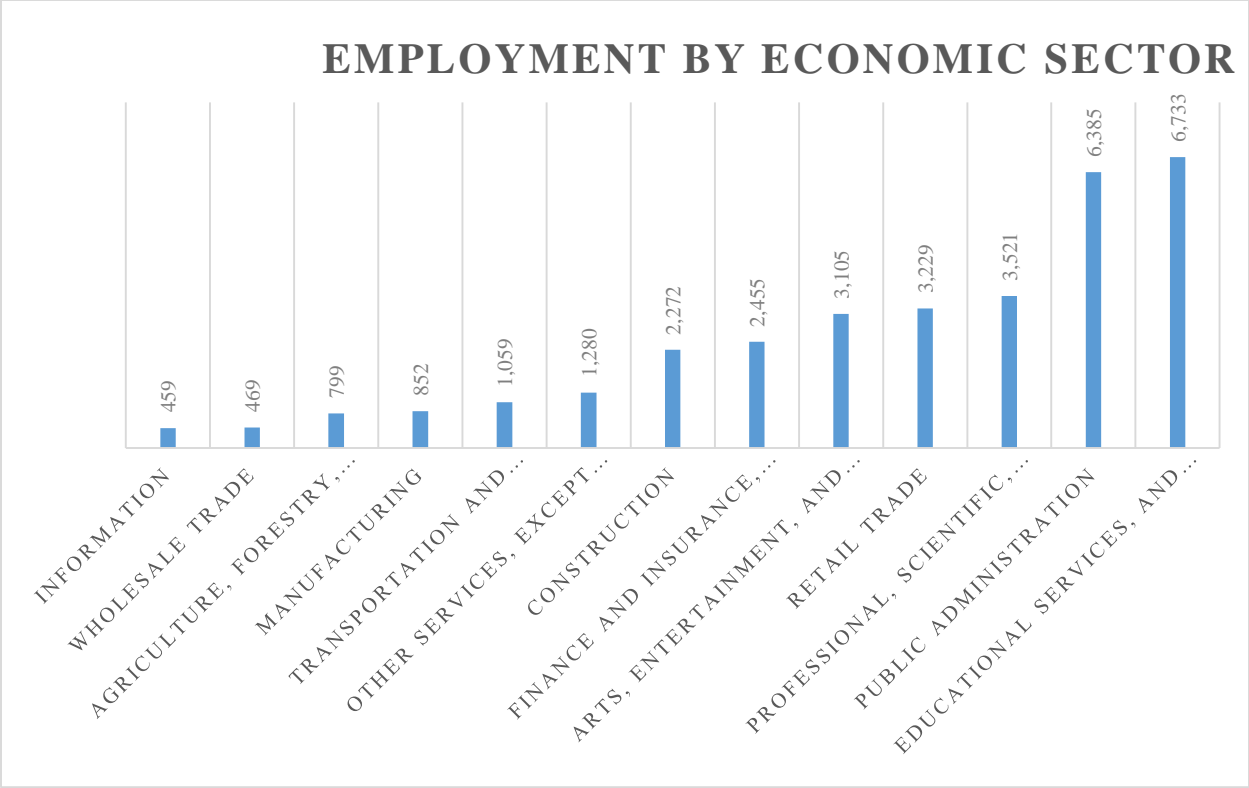


Source: US Census Bureau



Source: US Census Bureau

The following column chart shows the number of full-time and part-time jobs for the civilian employed population, 16 years and over, in Lewis and Clark County.



Source: U.S. Census Bureau, 2008-2012 American Community Survey

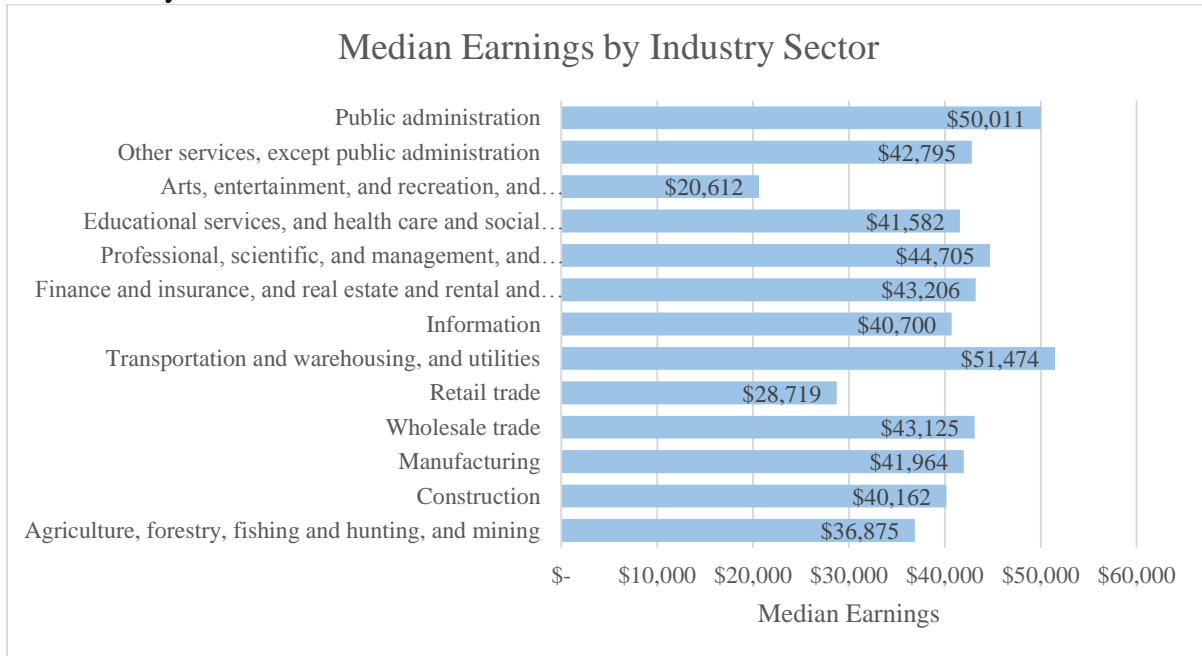
The table below lists the location quotients (with 1 or higher an export industry) by industry for Lewis and Clark County. The quotient is derived by dividing the number of jobs in an industry by the total number of jobs in Broadwater County. That number is then compared to the same ratio for the national level. A score of 1 or more indicates an industry employs more persons than the national level, meaning that the industry is profitable in the area and exports products.

Location Quotients calculated from Quarterly Census of Employment and Wages Data

| Industry | Lewis and Clark County | Industry | Lewis and Clark County |
|--|------------------------|---|------------------------|
| NAICS 112 Animal production and agriculture | 1.95 | NAICS 452 General merchandise stores | 1.56 |
| NAICS 236 Construction of buildings | 1.39 | NAICS 453 Miscellaneous store retailers | 1.67 |
| NAICS 237 Heavy and civil engineering construction | 1.53 | NAICS 492 Couriers and messengers | 1.1 |
| NAICS 312 Beverage and tobacco product manufacturing | 1.11 | NAICS 515 Broadcasting, except Internet | 1.29 |
| NAICS 441 Motor vehicle and parts dealers | 1.31 | NAICS 517 Telecommunications | 1.46 |
| NAICS 442 Furniture and home furnishings stores | 1.34 | NAICS 518 Data processing, hosting and related services | 3.81 |
| NAICS 443 Electronics and appliance stores | 1.39 | NAICS 522 Credit intermediation and related activities | 1.33 |
| NAICS 444 Building material and garden supply stores | 1.69 | NAICS 524 Insurance carriers and related activities | 1.78 |
| NAICS 541 Professional and technical services | 1.14 | NAICS 713 Amusements, gambling, and recreation | 1.99 |
| NAICS 611 Educational services | 1.01 | NAICS 721 Accommodation | 1.23 |
| NAICS 624 Social assistance | 1.68 | NAICS 722 Food services and drinking places | 1.16 |
| NAICS 447 Gasoline stations | 1.23 | NAICS 811 Repair and maintenance | 1.18 |
| NAICS 451 Sports, hobby, music instrument, book stores | 2.27 | NAICS 813 Membership associations and organizations | 5.08 |

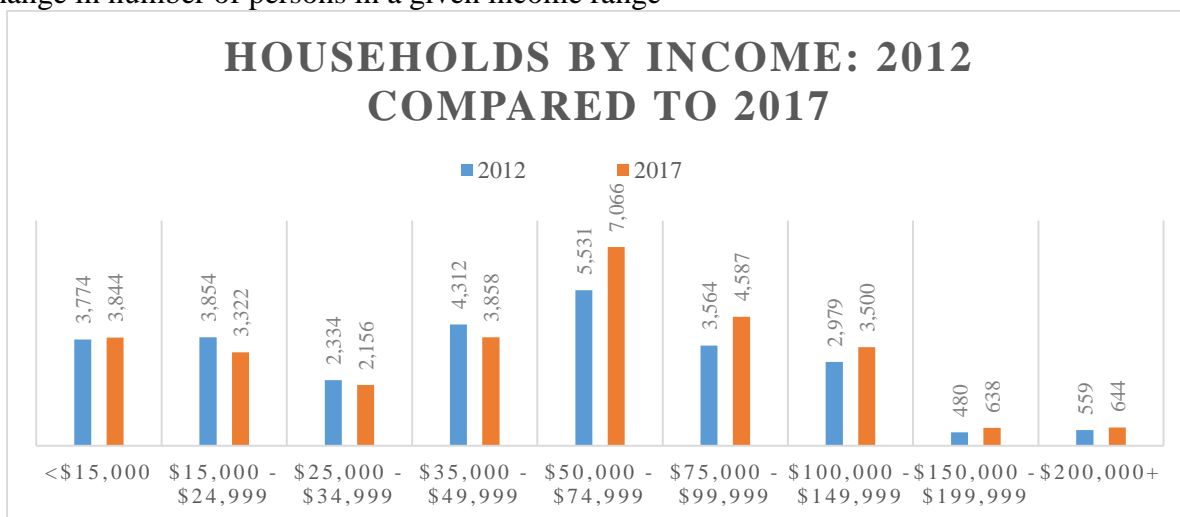
MEDIAN EARNINGS BY INDUSTRY

The following bar chart displays the median annual earnings for each industry in Lewis and Clark County:



Source: U.S. Census Bureau, 2008-2012 American Community Survey

In Lewis and Clark County for the year 2012, the median household income was \$47,335 with an average household income of \$59,043. By the year 2017, the median household income is expected to grow to \$53,907 with the average household income increasing to \$64,918. This shows that the region is maintaining ground as compared to the national median average, going from 94.41% to 94.7539% of national averages. The following graph depicts the projected change in number of persons in a given income range

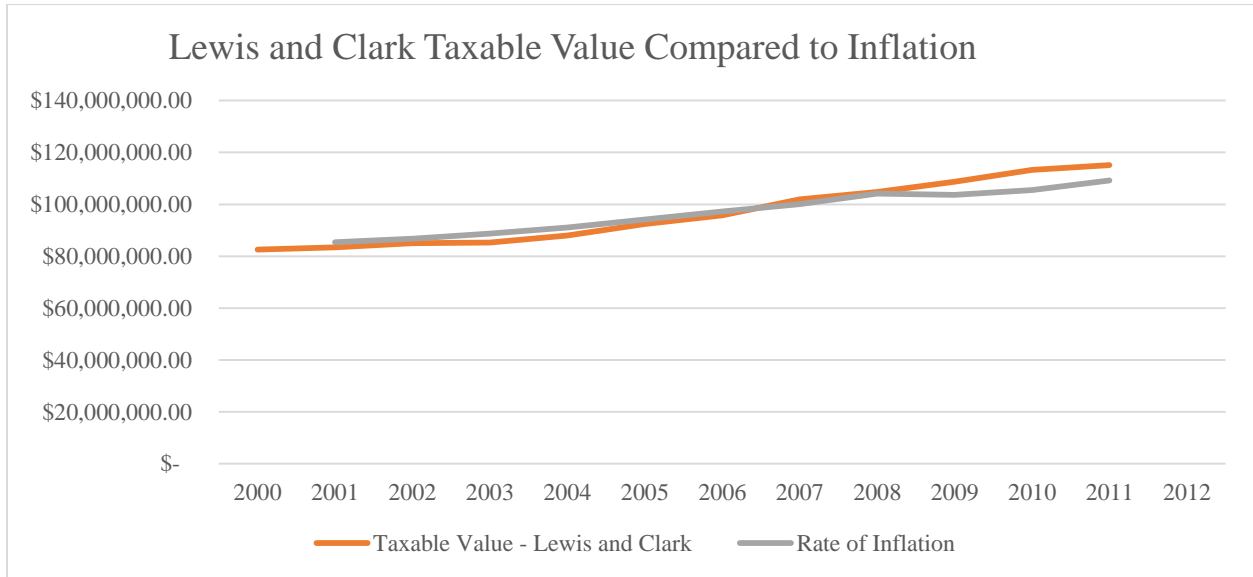


Source: Esri Business Analysis

Economy – Public Sector

TAXABLE VALUE AND GOVERNMENT SPENDING

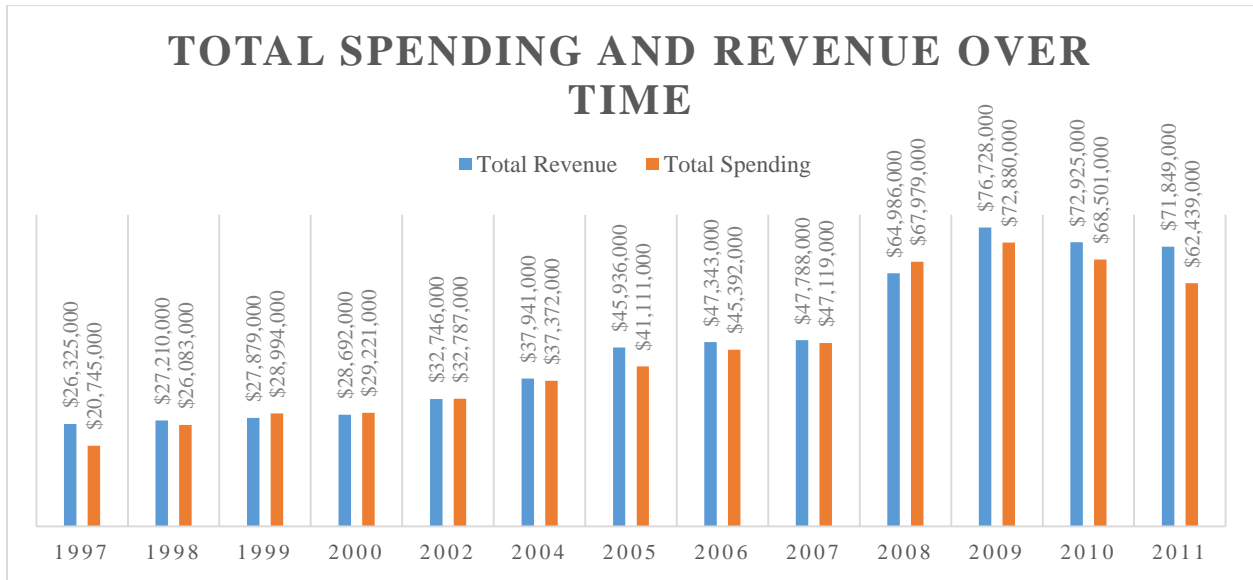
The following graph shows the change in taxable value for Lewis and Clark County from 2000-2011. The orange line depicts the taxable value, the grey line depicts inflation over that same time period



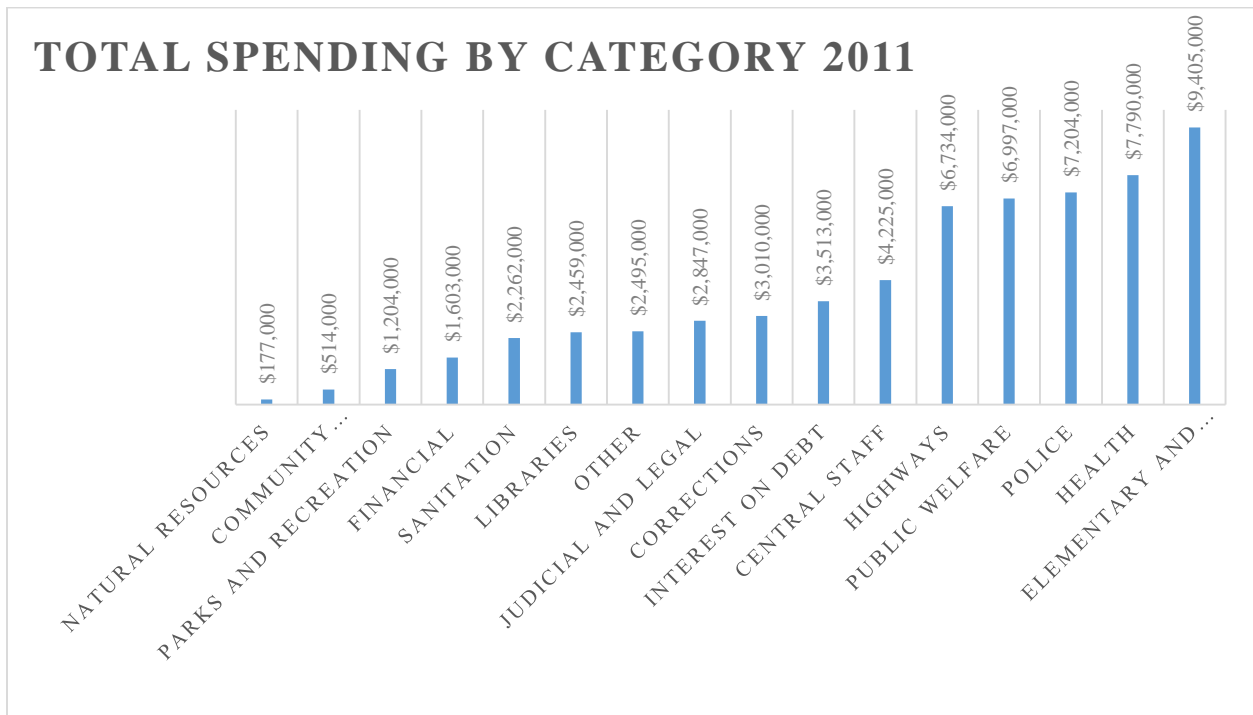
Source: The Montana Tax Foundation

As demonstrated by the above graph, the taxable value of Lewis and Clark County has been keeping pace with inflation over the past 12 years.

The following 5 charts depict the County budgeting categories and costs of services

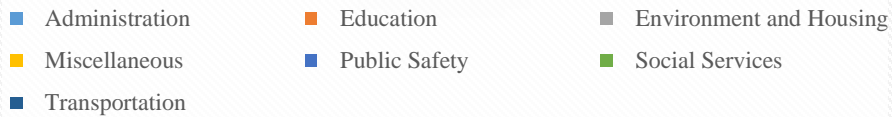
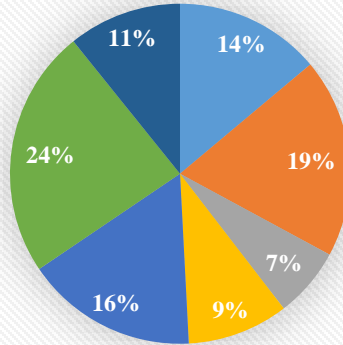


Source: US Census Bureau



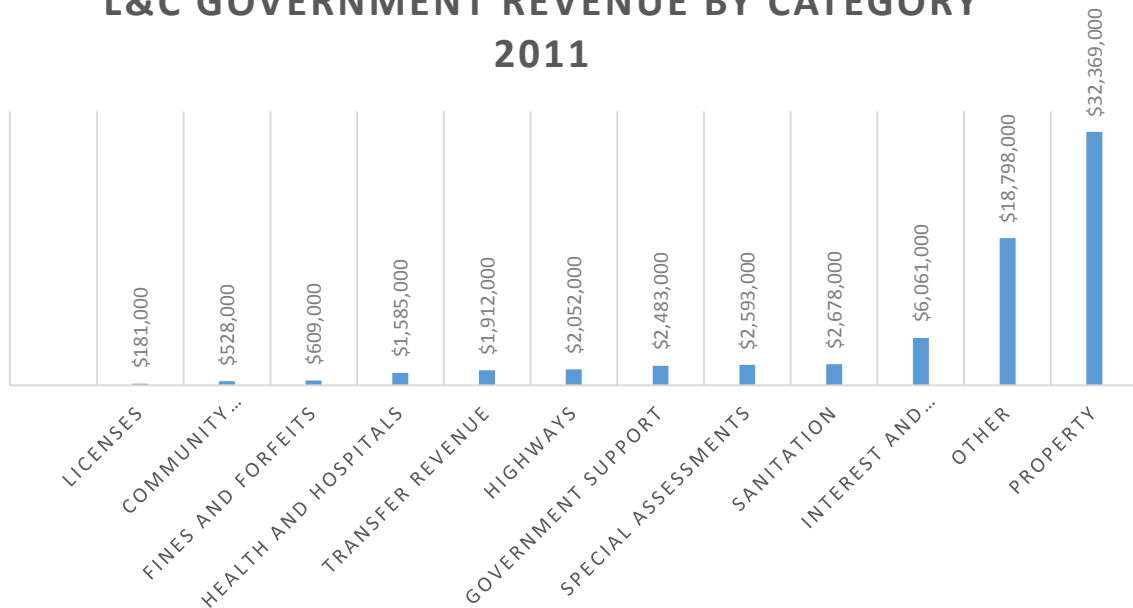
Source: US Census Bureau

L&C Government Spending by Category (%) 2011



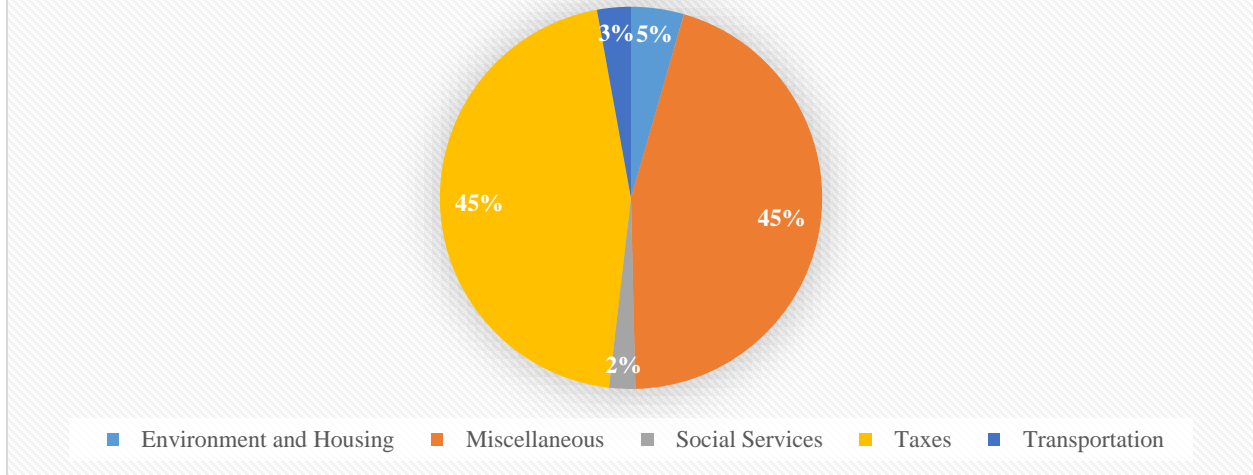
Source: US Census Bureau

L&C GOVERNMENT REVENUE BY CATEGORY 2011



Source: US Census Bureau

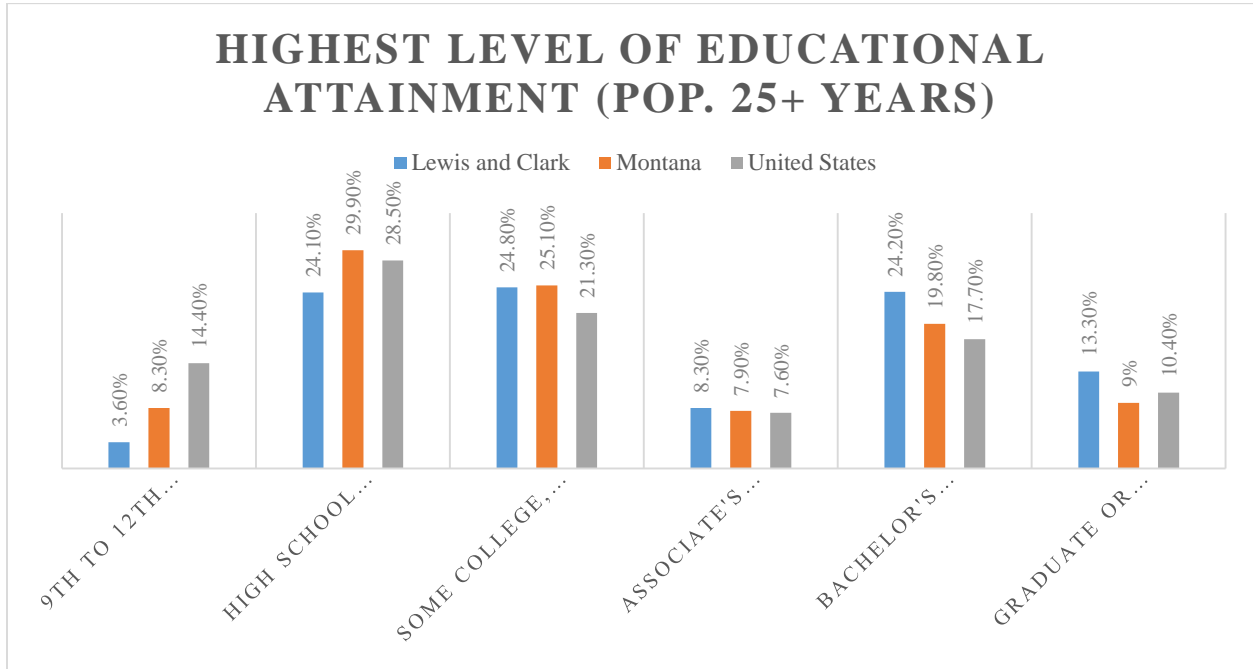
L&C Government Revenue by Category (%) 2011



Source: US Census Bureau

Education

The chart below displays the highest level of educational attainment in persons aged 25 or more.



Source: U.S. Census Bureau, American Community Survey 2010 (US & MT), and 2005-2009 estimates (county)

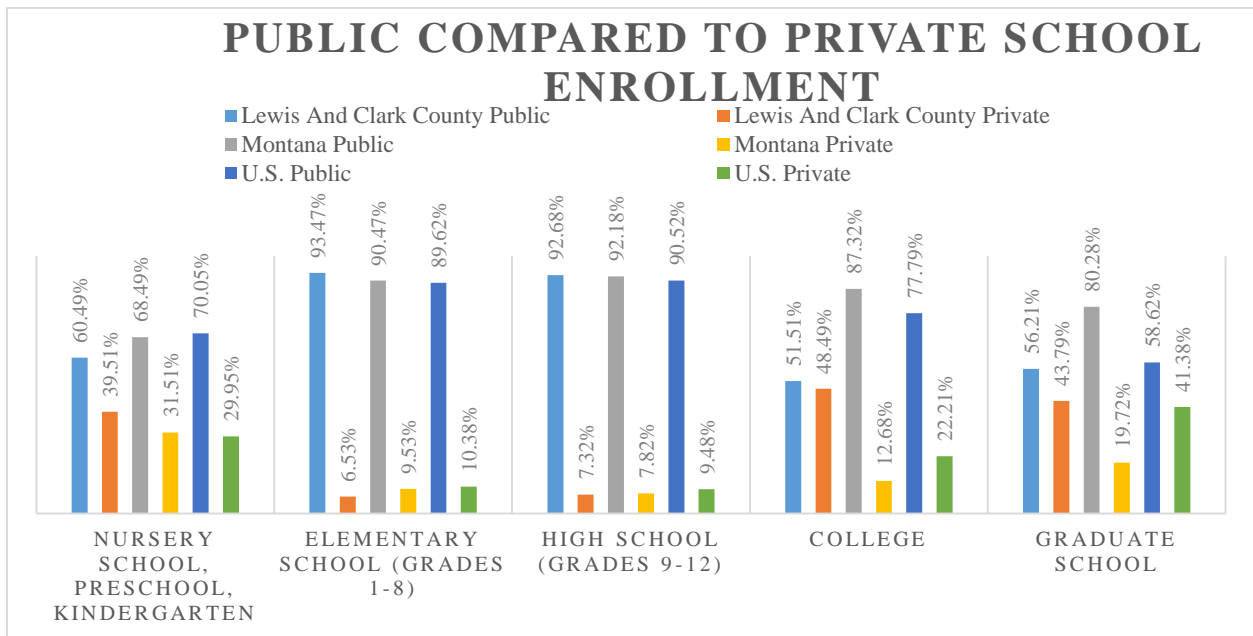
As the chart shows, Lewis and Clark County is an educated community with 70.6% of the populous having some college courses or greater. Those with less than a high school diploma (3.6%) is much lower than the Montana overall average of 8.3% as well as the United States (14.4%).

There are eight school district in Lewis and Clark County.

| School Name | City | Number of Students | Female Students | Male Students | Female - Male Student Ratio |
|----------------------------|--------------|--------------------|-----------------|---------------|-----------------------------|
| Augusta High School | Augusta | 38 | 20 | 18 | 1.11 |
| Augusta Elementary School | Augusta | 32 | 11 | 21 | 0.52 |
| Augusta 7-8 | Augusta | 12 | 7 | 5 | 1.4 |
| Trinity School | Canyon Creek | 24 | 9 | 15 | 0.6 |
| Radley Elementary School | East Helena | 481 | 231 | 250 | 0.92 |
| East Valley Middle School | East Helena | 393 | 193 | 200 | 0.96 |
| Eastgate School | East Helena | 258 | 123 | 135 | 0.91 |
| Helena High School | Helena | 1,642 | 818 | 824 | 0.99 |
| Capital High School | Helena | 1,369 | 669 | 700 | 0.96 |
| C R Anderson Middle School | Helena | 1,028 | 501 | 527 | 0.95 |
| Helena Middle School | Helena | 653 | 309 | 344 | 0.9 |
| Four Georgians School | Helena | 511 | 241 | 270 | 0.89 |
| Rossiter School | Helena | 490 | 240 | 250 | 0.96 |
| Smith School | Helena | 312 | 153 | 159 | 0.96 |
| Warren School | Helena | 310 | 136 | 174 | 0.78 |
| Jim Darcy School | Helena | 287 | 137 | 150 | 0.91 |
| Broadwater School | Helena | 283 | 151 | 132 | 1.14 |
| Central School | Helena | 281 | 140 | 141 | 0.99 |

| | | | | | |
|---------------------------|------------|-----|-----|-----|------|
| Hawthorne School | Helena | 255 | 132 | 123 | 1.07 |
| Bryant School | Helena | 248 | 104 | 144 | 0.72 |
| Jefferson School | Helena | 246 | 115 | 131 | 0.88 |
| Kessler Elementary School | Helena | 232 | 107 | 125 | 0.86 |
| Lincoln Elementary School | Lincoln | 81 | 40 | 41 | 0.98 |
| Lincoln High School | Lincoln | 66 | 31 | 35 | 0.89 |
| Lincoln 7-8 | Lincoln | 22 | 11 | 11 | 1 |
| Auchard Creek School | Wolf Creek | 26 | 18 | 8 | 2.25 |
| Wolf Creek School | Wolf Creek | 12 | 9 | 3 | 3 |

Source: US Department of Education



Source: US Census American Community Survey

To learn more about the education system in Lewis and Clark County, visit the County Superintendent of Schools website to direct you to your specific district:

<http://www.lccountymt.gov/education/superintendent.html>

Health, Medical, and Emergency Services

LAW ENFORCEMENT

Lewis and Clark County Sheriff's Department

The Lewis & Clark County Sheriff's Office is the chief law enforcement agency in Lewis & Clark County, Montana. It is comprised of sixty employees including sworn officers, detention officers and professional support staff. The Sheriff's Office provides general law enforcement, detention functions, and rural fire support and search and rescue operations for the citizens of Lewis & Clark County in a service area of over two million acres. Additionally, this agency provides specialized regional services to all of the county and contract law enforcement to specific areas.

FIRE PROTECTION

There are 16 fire departments that assist Lewis and Clark County with fire protection. The Lewis and Clark VFD is the primary fire department. It currently has thirteen volunteer firefighters under the leadership of an appointed chief, Walter Jester. Currently the department has four fire apparatus: one 1972 Seagraves 1250 GPM engine; one 1981 Chevrolet one ton 4X4 brush unit; one 1970 International 800 gallon water tender; and one 1994 Chevrolet 4X4 pickup used as an equipment and command vehicle. The department is currently rebuilding a 1980 Ford 1500 gallon water tender.

HOSPITALS

St. Peters Hospital
Shodair Children's Hospital

St. Peter's employs approximately 1,180 staff members. Medical staff consists of 110 physicians representing approximately 30 different specialties, with significant strength in the primary care specialty areas. Staff members provide medical care and service in the areas of family practice, specialty care, surgery, cancer treatment, orthopedics, cardiology, behavioral health, hospice, seven-day-a-week urgent care and more. There are also approximately 100 people that volunteer for nearly 13,000 hours at St. Peter's annually. St. Peter's Hospital is a sole provider, not-for-profit, licensed 123-bed facility. It is accredited by the Joint Commission and is an affiliate of VHA-Mountain States.

Shodair's medical specialists develop programs that provide care and treatment of children suffering from illness, diseases, and other physical, mental, and emotional conditions that impair their health and well-being. Shodair's Child and Adolescent Psychiatry Program has 3 units: Acute Care, Children's Residential and Adolescent Residential. The Program has a total of 88 beds and is staffed by 5 psychiatrists who specialize in the treatment of children and adolescents, 9 primary therapists, 2 psychologists, 1 speech-language pathologist, and a number of RN's, LPN's, special education teachers, mental health technicians and music, art and recreation

therapists. Shodair also houses the Montana Medical Genetics Program that consists of 5 departments: Clinical Genetics, a laboratory, Cytogenetics, DNA, and Newborn Screening Follow-up.

| Municipal Services | | | | | | |
|---------------------------|--|--|--|--|--|--|
| | Community Infrastructure Systems | | | | | |
| | East Helena | Augusta | Craig | Wolf Creek | Helena | Lincoln |
| Water | Groundwater Treatment * | Private Wells | Private Wells | Private Wells | Ground/Surface Water Treatment | Private Wells |
| Wastewater | Central Mechanical Treatment * | Total Retention Lagoons* | Private Septic Systems | Private Septic Systems | Central Mechanical Treatment | Step System and Lagoons |
| Power | Overhead/Underground Northwestern Energy | Overhead/Underground Northwestern Energy | Overhead/Underground Northwestern Energy | Overhead/Underground Northwestern Energy | Overhead/Underground Northwestern Energy | Overhead/Underground Northwestern Energy |
| Natural Gas | Northwestern Energy Distribution | Underground Distribution System | Underground Distribution System | Underground Distribution System | Underground Distribution System | N/A |
| Traffic | Complex Urban/Rural Hwy 287 | Rural Hwy 287 / Hwy 12 | Rural | Rural | Complex Rural | Rural |
| Railroad | Montana Rail Link | N/A | N/A | N/A | Montana Rail Link | N/A |
| Airport | Helena Regional Airport | Augusta Airport | N/A | N/A | Helena Regional Airport | Lincoln Airport |

Utilities

Electric Utilities are provided by Northwestern Energy and Vigilante Electric. Natural Gas is distributed by Northwestern Energy. Propane in rural regions, not supplied by a dedicated natural gas line is distributed Amerigas, and Montana Energy Alliance.

Charter and 3 Rivers Communication provide phone service.

Transportation

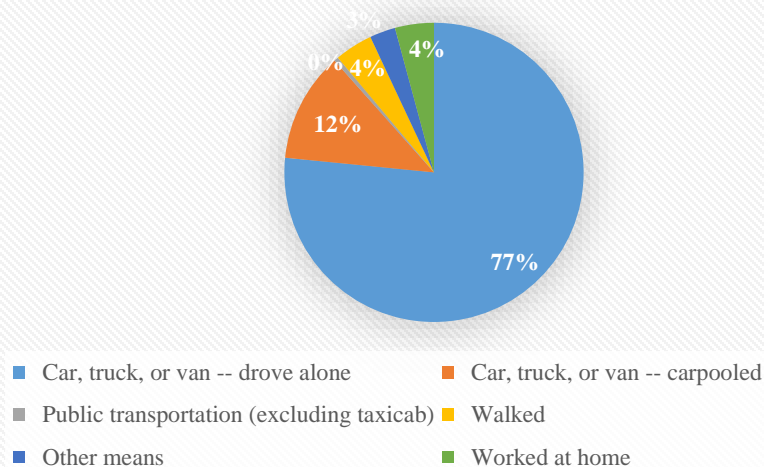
Transportation throughout the region is provided by Montana highways, County and City roads and streets. Interstate highway I-15 provides direct access to routes north and south.

Montana Rail Link provides rail service in Lewis and Clark County, with daily service 6 days a week. <https://www.montanarail.com/>

Helena Regional Airport provides service to Seattle, Salt Lake, Minneapolis/St. Paul, and Denver. <http://helenaairport.com/>

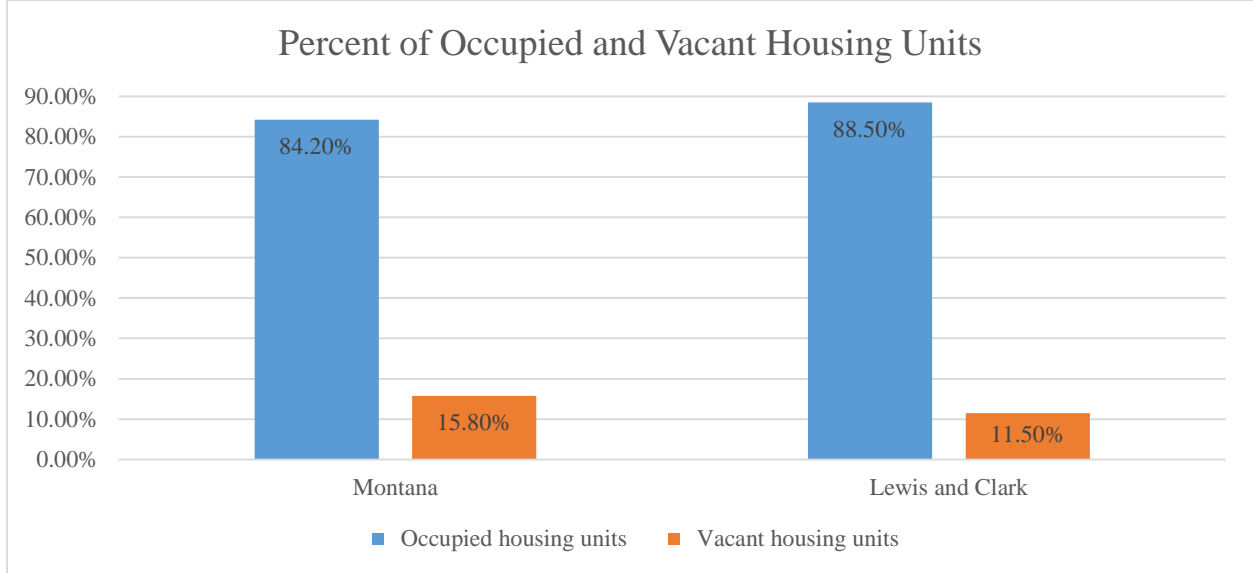
The County maintains public airfields in Augusta, Benchmark, Lincoln and Mountain Lakes Field.

Mode of Transportation to Work

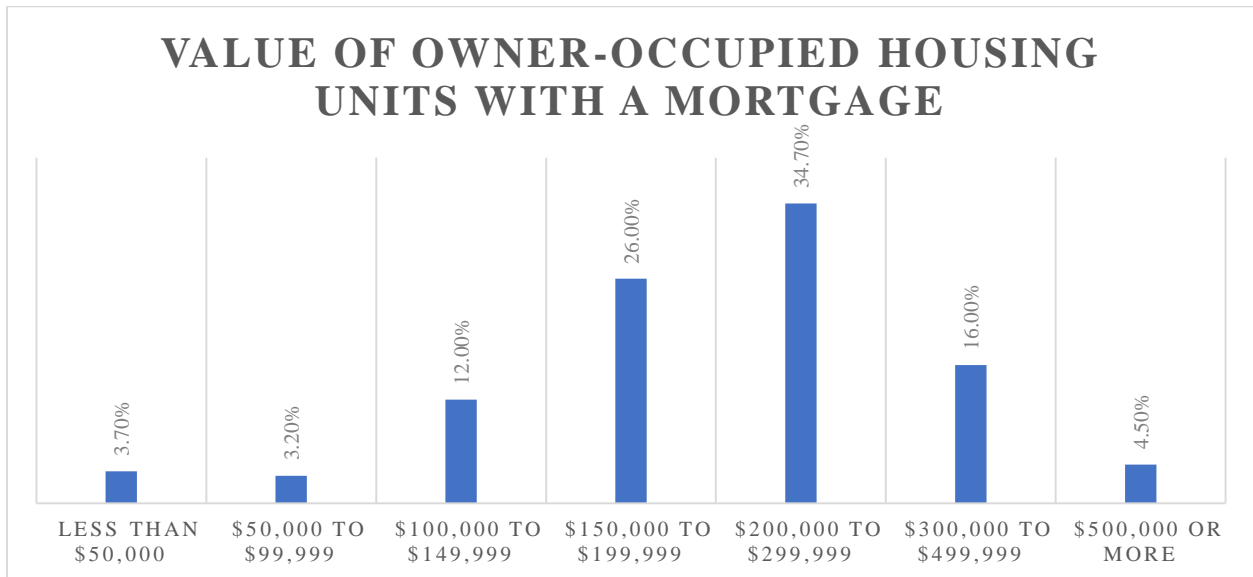


Source: US Census Bureau

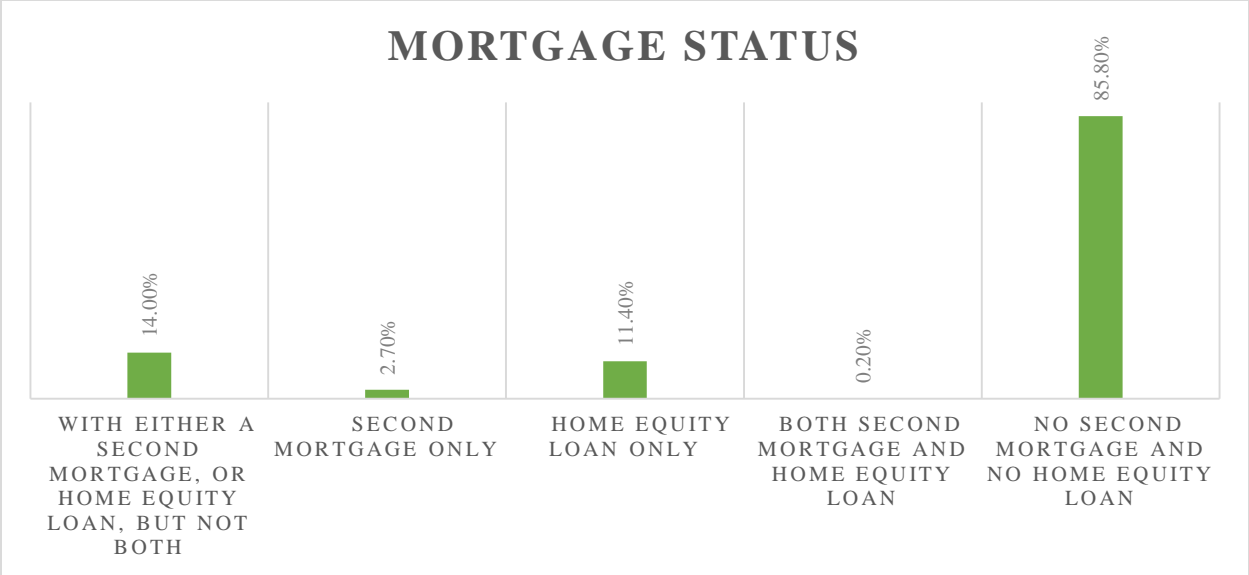
Housing Stock and Characteristics



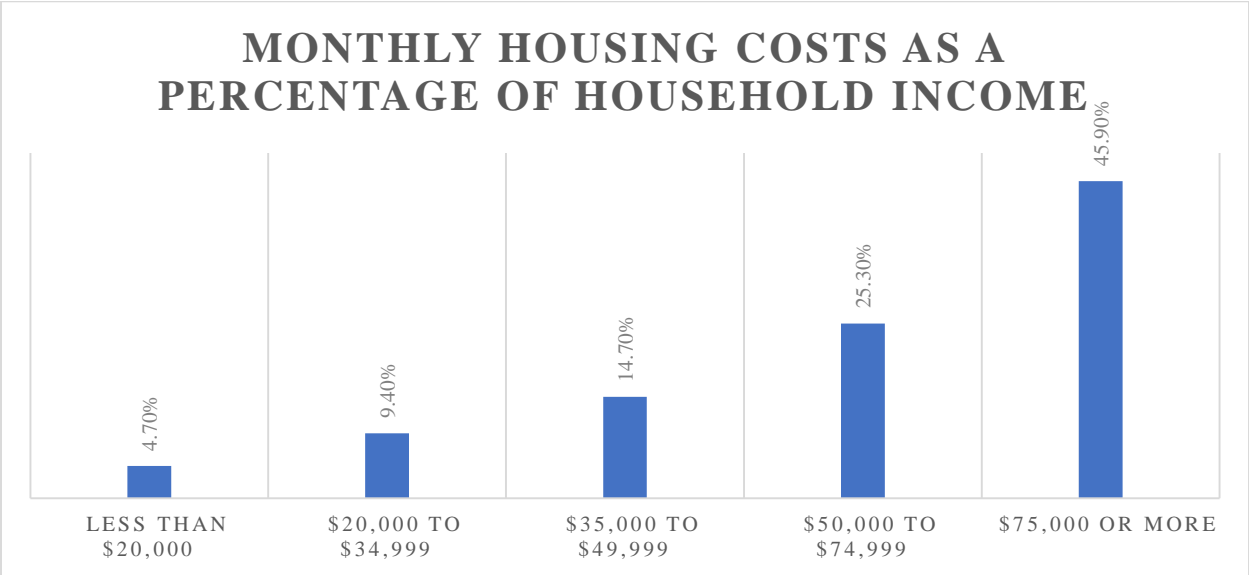
Source: US Census Bureau



Source: US Census Bureau



Source: US Census Bureau



Source: US Census Bureau



Source: US Census Bureau

The following table shows the percentage of houses that were built in each 10-year period:

| YEAR STRUCTURE BUILT | Units |
|-----------------------------|--------------|
| Built 2010 or later | 274 |
| Built 2000 to 2009 | 4762 |
| Built 1990 to 1999 | 4508 |
| Built 1980 to 1989 | 3676 |
| Built 1970 to 1979 | 5976 |
| Built 1960 to 1969 | 2656 |
| Built 1950 to 1959 | 2184 |
| Built 1940 to 1949 | 1257 |
| Built 1939 or earlier | 4769 |

Source: US Census 2010

Agriculture

| AGRICULTURAL STATISTICS FOR LEWIS AND CLARK COUNTY | | | |
|--|-------------|-------------|----------|
| | 2007 Census | 2002 Census | % Change |
| FARMS | | | |
| Farms: (number) | 675.00 | 635.00 | 6% |
| Land in farms (acres) | 971240.00 | 841826.00 | 15% |
| Average size of farms (acres) | 1439.00 | 1326.00 | 9% |
| Median size of farms (acres) | 50.00 | 60.00 | -17% |
| Farms by size: (number) | | | |
| Less than 1,000 acres | 578.00 | 541.00 | 7% |
| 1,000 acres or more | 97.00 | 94.00 | 3% |
| Farms by value of products sold: (number) | | | |
| Less than \$100,000 | 616.00 | 586.00 | 5% |
| \$100,000 or more | 59.00 | 49.00 | 20% |
| Farms by type of organization: (number) | | | |
| Family, Individual, Partnership | 618.00 | 596.00 | 4% |
| Corporation, Cooperative, Trust | 57.00 | 39.00 | 46% |
| LIVESTOCK INVENTORY AND CROPS HARVESTED | | | |
| Livestock and Poultry Inventory (number) | | | |
| Cattle and calve | 45607.00 | 39644.00 | 15% |
| Sheep and lambs | 3244.00 | 3776.00 | -14% |
| Horses and ponies | 2732.00 | 2492.00 | 10% |
| Crops Harvested (acres) | | | |
| Wheat for grain, All | 17552.00 | 6829.00 | 157% |
| Barley for grain | 10329.00 | 7786.00 | 33% |
| Hay, haylage, grass silage | 42925.00 | 45339.00 | -5% |
| OPERATOR DEMOGRAPHICS | | | |
| Primary occupation: (number) | | | |
| Farming | 267.00 | 337.00 | -20% |
| Other | 408.00 | 301.00 | 36% |
| Place of residence: (number) | | | |
| On farm operated | 597.00 | 570.00 | 5% |
| Not on farm operated | 78.00 | 65.00 | 20% |
| Years on present farm: (number) | | | |
| Less than 10 years | 185.00 | 186.00 | -1% |
| 10 years or more | 490.00 | 449.00 | 9% |
| Age group: (number) | | | |

| | | | |
|--------------------------------------|--------|--------|------|
| Under 55 years | 285.00 | 326.00 | -13% |
| 55 years and over | 390.00 | 309.00 | 26% |
| Average age of operators: (number) | 57.40 | 55.50 | 3% |
| Source: US Department of Agriculture | | | |

Natural Resource and Environmental Issues

Lewis and Clark County has been a producer of timber for the Lumber industry for many years. RY Timber maintains a lumber mill in Townsend, Pyramid Mountain Lumber in Seely Lake and Sun Mountain Lumber in Deer Lodge. In recent years it has proven to be very difficult to source timber from federal lands. Private land owners with forested properties have been managing their properties and selling timber into regional mills. An epidemic of Pine Bark Beetle as well as other invasive species have infested the forested regions in the County. Much of the affected timber has not been harvested, and at this time is no longer viable for use as saw logs.

Mining has been a historic industry in Lewis and Clark County. This includes the precious stone – Sapphire which is prevalent along portions of the Missouri River, such a Spokane Bar.

Historically the region is well known for placer gold, but also deposits of Copper, Gold, Silver and Lead.

Natural Resources of other note in the region are large deposits of limestone and shows of Molybdenum outside of Canyon Creek.

For an interactive map of known mineral deposits in Lewis and Clark County, follow this link to the MBAC website. From this site you can gain access to layers that are used in Google Earth and identify historic deposits with associated known data.

Historic mining districts in Lewis and Clark County.

| | |
|---|--------------------------------|
| http://www.deq.mt.gov/abandonedmines/linkdocs/94tech.mcp | Austin District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/96tech.mcp | Gould/Stemple District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/103tech.mcp | Rimini District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/95tech.mcp | Blue Cloud District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/203tech.mcp | Bob Marshall District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/97tech.mcp | Heddleston/Mike Horse District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/98tech.mcp | Helena/Last Chance District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/32tech.mcp | Hellgate District |

| | |
|---|------------------------------|
| http://www.deq.mt.gov/abandonedmines/linkdocs/99tech.mcp | Lincoln District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/100tech.mcp | Marysville District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/101tech.mcp | Missouri River District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/104tech.mcp | Scratchgravel Hills District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/105tech.mcp | Wolf Creek District |
| http://www.deq.mt.gov/abandonedmines/linkdocs/106tech.mcp | York District |

Warm Spring activity around the Helena region is of potential economic interest. Warm spring in the Boulder, Alhambra, Broadwater and Marysville areas have shown interest leading to an extensive study in 1973 at the Marysville geothermal area. Dr. David Blackwell of Southern Methodist University drilled blind holes in the Marysville and White Earth areas and found extensive heat sources. It is estimated that the source rock temperatures are:

Boulder - 136 °C

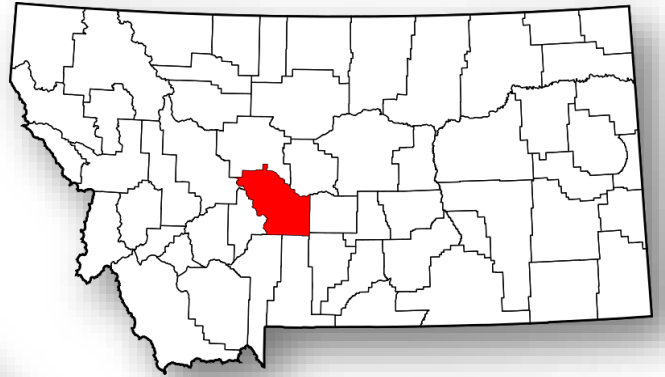
Alhambra – 96 °C

Broadwater – 118 °C

Marysville – 130 °C with heat flow data of 240 °C/km

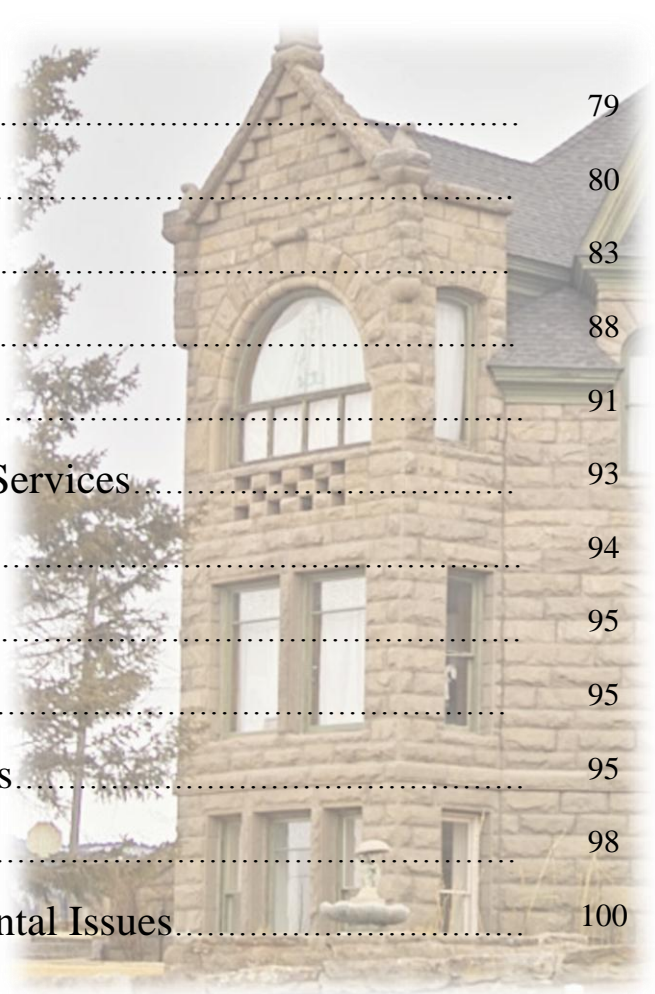
For an interactive map of known mineral deposits in Lewis and Clark County, follow this link to the MBAC website. From this site you can gain access to layers that are used in Google Earth and identify historic deposits with associated known data.

www.MBAC.biz/Mineralization.php



Meagher County

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Overview

Meagher County was created in the Montana Territory in 1867, and named after the colorful general Thomas Francis Meagher, the acting Governor of the Montana Territories from 1865-1867. The County was cut out of Chouteau and Gallatin counties and originally totaled 20,000 square miles. From 1867-1920, portions of the Judith, Musselshell, Smith and Missouri River basins were removed from the original Meagher County, creating new counties. By 1920, Meagher County was 2,395 square miles.

The County Seat was moved from Diamond City to White Sulphur Springs in 1880. White Sulphur Springs was founded by James Brewer in 1866 at the site of Trinity Springs, a thermal hot spring that was frequented by the Flathead Indians as



well as many other tribes and considered neutral territory because of its medicinal value. Initially called Brewer's Springs, the facility was sold to Dr. Parberry in 1876 and renamed White Sulphur Springs.

The region grew rapidly with the discovery of gold in Confederate Gulch at Diamond City in 1864. The population of the region swelled to more than 5,000 people by 1868, driven by placer gold deposits in the Big Belt Mountains. But, by 1870, the placer deposits of Diamond City and Confederate Gulch had plaid out and the population moved on looking for new found mineral deposits and riches in towns like Castle, Copperopolis and Neihart.

The grand valley of Meagher County became the bread basket to the mining cities and supplied timber and agriculture to the surrounding region.

The valley in the early days was dominated by sheep ranches, such as the C.M. Bair ranch in Martinsdale but later transitioned to cattle ranching and hay production. The region still remains a productive ranching community.²



The panic of 1893 brought lead and silver mines in Castle to a standstill, but construction continued on the Montana Railroad (Jawbone Railroad) from Lombard to Ringling then Loweth, with the hope that the rail line would facilitate the reopening of the mining districts. In 1908, what remained of the Montana Railroad was sold to the Chicago, Milwaukee, St. Paul and Pacific Railroad Company, which later became the Milwaukee Road.



The region also includes the communities of Martinsdale, Checkerboard, Lennep and Ringling.

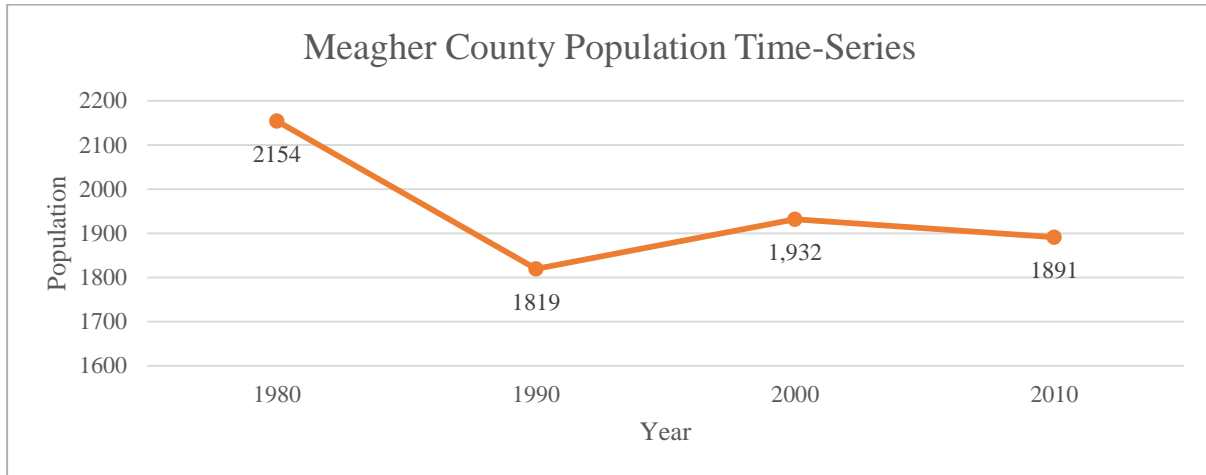
Population

In 2010, the US Census Bureau determined the population of Meagher County was 1,891. This was a far cry from the population in Meagher County during its heyday in 1867 of over 5,000 people. In 1980, Meagher County had a population of 2,154, but in 1984 the closure of two lumber mills and the associated timber harvest jobs that were related accounted for a steep decline of -1.6% annually in population that continued into the 1990's.

² Excerpts taken from Meagher County: An Early-Day Pictorial History, 1867-1967:
<http://cdm103401.cdmhost.com/cdm/compoundobject/collection/p15018coll43/id/11744>

The population estimate in Meagher County for 2012 was 1,905, with a 5 year forecast of 1,883 by 2017. This equates to a -.23% annual decrease. Median age in 2012 was 50.8 years of age, with an estimated median age of 52.0 by the year 2017.³ If this aging trend continues, Meagher County will be the 6th oldest county by age in the State of Montana. This has implications to both the agriculture and recreation industries of the area.

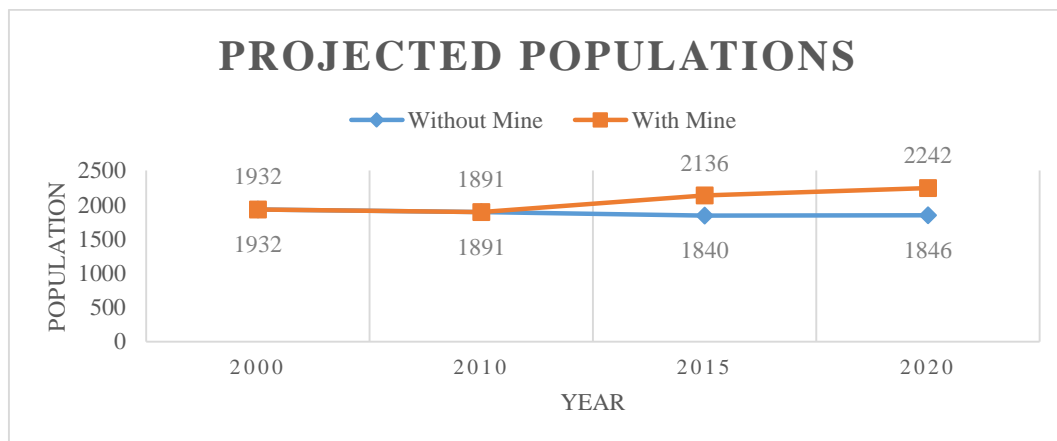
The following line chart shows the changes in Meagher County’s population from 1980-2010:



Sources: US Bureau of the Census—Montana Population of Counties by Decennial Census: 1900 to 1990; U.S. Census Bureau, Census 2000; U.S. Census Bureau, 2010 Census

In January of 2014, the Montana Department of Environmental Quality approved a revised mining permit to Tintina Resources for the construction of an underground mine decline to further evaluate a copper/cobalt deposit. If this mining endeavor is successful and a fully funded mine is constructed, the population numbers in Meagher County will be significantly altered.

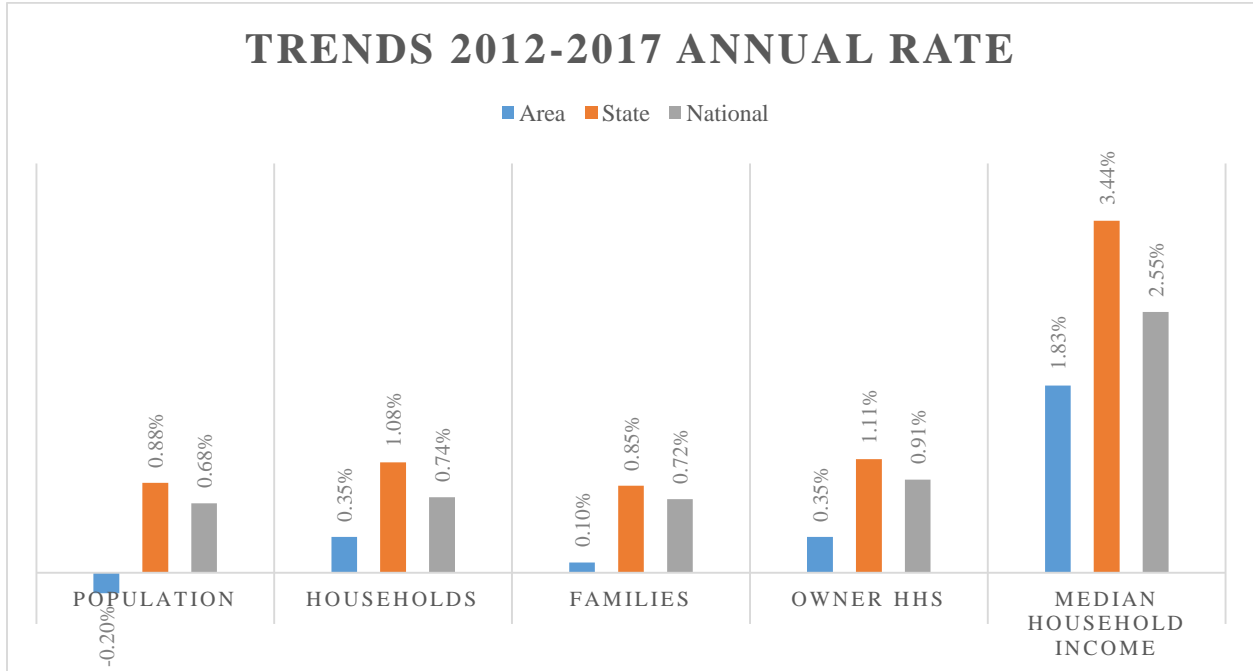
The following chart depicts the estimated population growth to the community with and without the mine. These numbers, projected to 2020, assume mining operations beginning with the construction of the decline in 2014 and mine commencement in 2016.



³ Esri, Business Analysis data, 2012, with growth projections for Tintina Resources

Sources: US Bureau of the Census--Montana Population of Counties by Decennial Census: 1900 to 1990; U.S. Census Bureau, Census 2000; U.S. Census Bureau, 2010 Census

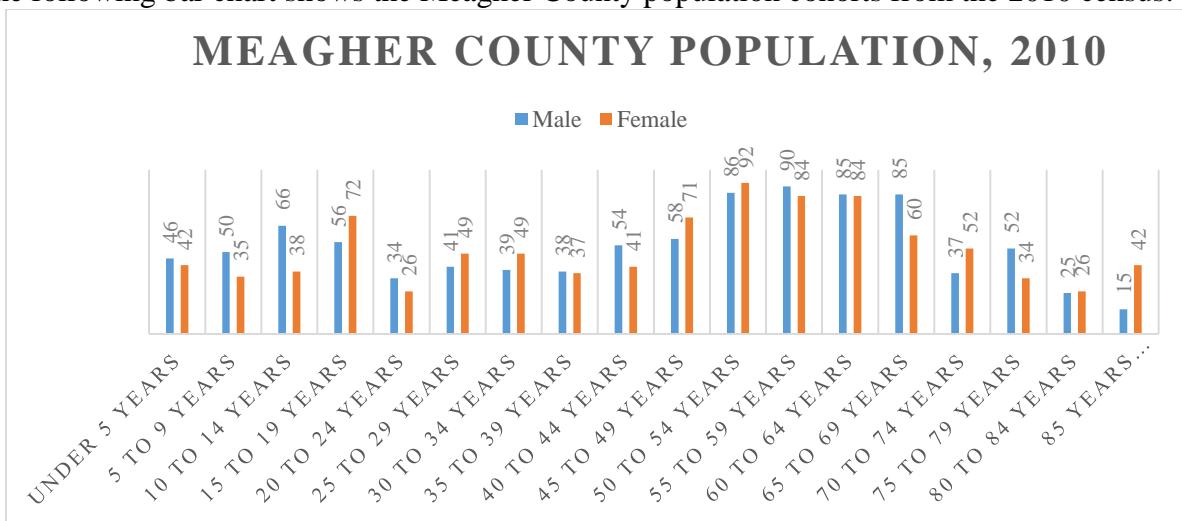
The following bar chart depicts the estimated change in growth for Meagher County by the year 2017:



Sources: Esri Business Analysis, Community Profile 2012

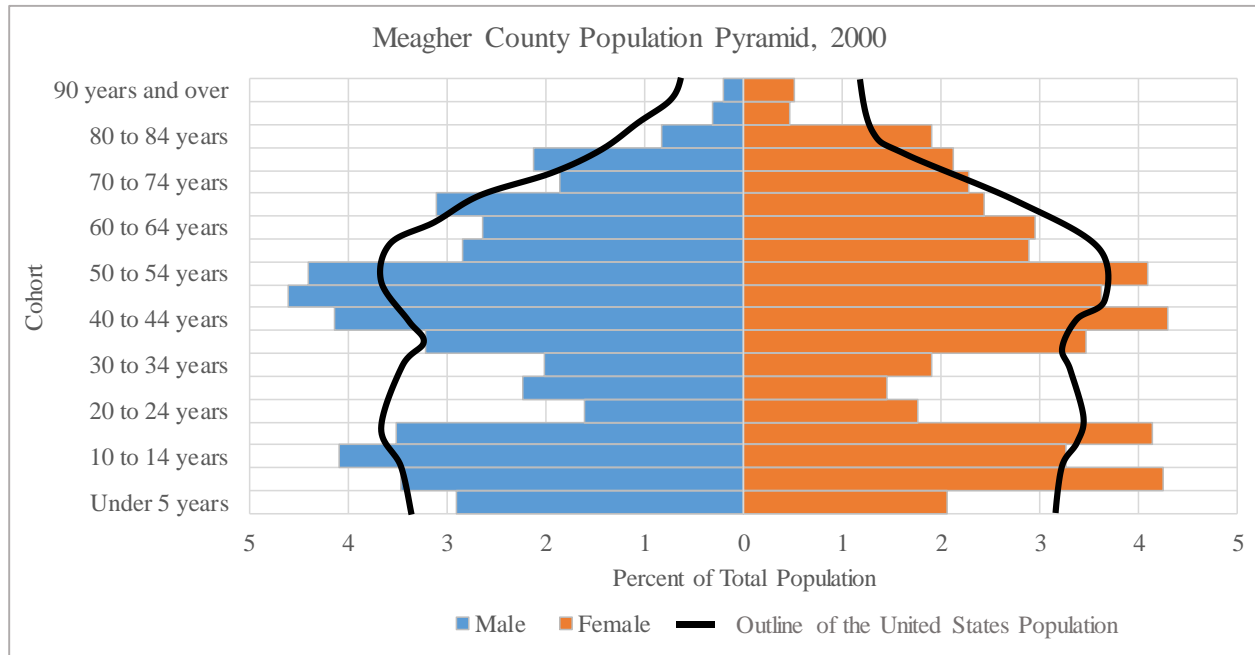
POPULATION OF MEAGHER COUNTY BY AGE; 2010

The following bar chart shows the Meagher County population cohorts from the 2010 census:



Source: U.S. Census Bureau, 2010 Census

The following bar chart contrasts percentages of Meagher County’s and the United States’ population cohorts. Meagher County has a relatively older population compared to that of the United States. In 2010 the median age in Meagher County was 50 years and the median age in the United States was 37. It is projected that the median age in Meagher County will be 52 by 2017.



Source: U.S. Census Bureau, 2010 Census

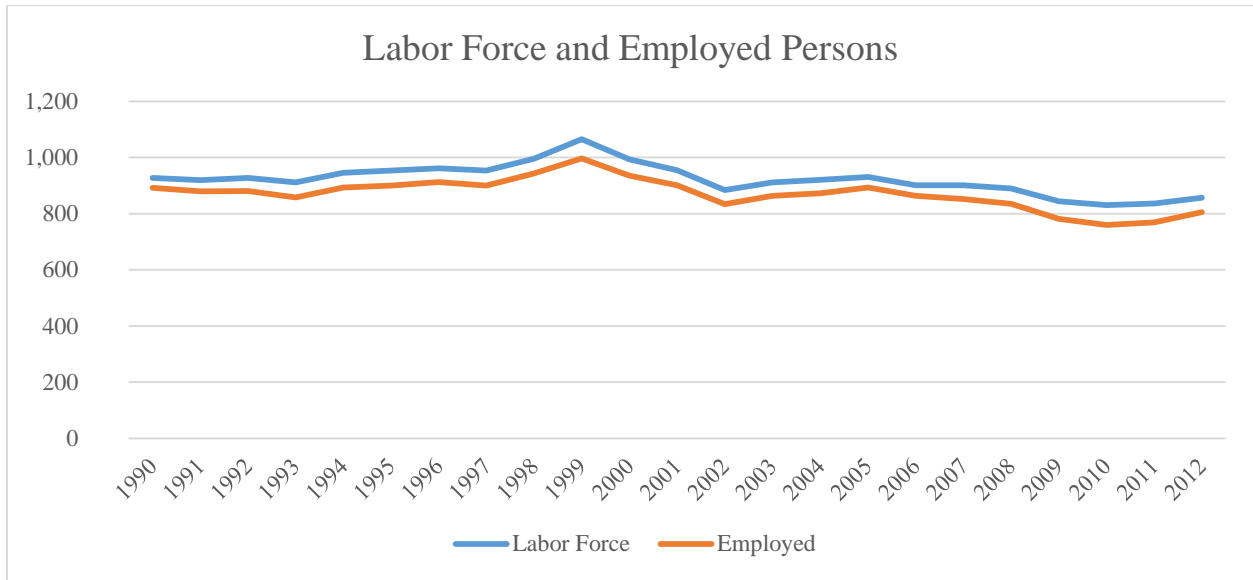
Economy – Private Sector

The economy of Meagher County is comprised primarily of Agriculture, Tourism, with a small amount of mining and logging. According to City-Data.com, in March of 2012, the Cost of Living index for Meagher County was scored at 87.3 as compared to a national average of 100, indicating that it is generally less expensive to live in Meagher County.⁴ The US Census Bureau’s Small Area Income and Poverty Estimates (SAIPE) program determined that in 2012, 353 residents (19.1%) of Meagher County were living in poverty, with 103 of those residents being under the age of 18.

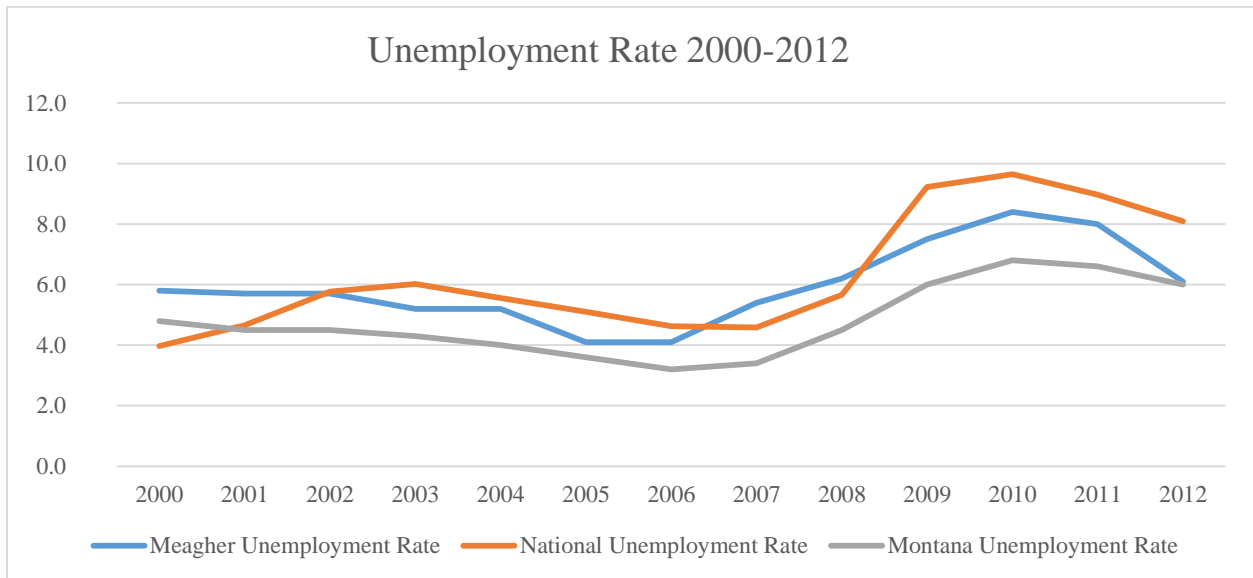
| Top Private Employers in Meagher County Based on 2nd quarter 2011 data | |
|--|------------|
| Business Name | Size Class |
| Mountainview Medical Center | 5 |
| Showdown Ski Area | 4 |
| The Equestrian Center at Horse Creek | 4 |
| Town Pump | 4 |
| Bank of the Rockies | 3 |
| Branding Iron Café | 3 |
| Castle Mountain Ranch Inc. | 3 |
| Galt Ranch | 3 |
| Mathis Food Farm | 3 |
| Seventy-One Ranch LP | 3 |
| Employment Size Class Coding: Class 5 = 50 - 99; Class 4 = 20 - 49; Class 3 = 10 - 19 | |

⁴ http://www.city-data.com/county/Meagher_County-MT.html

EMPLOYMENT



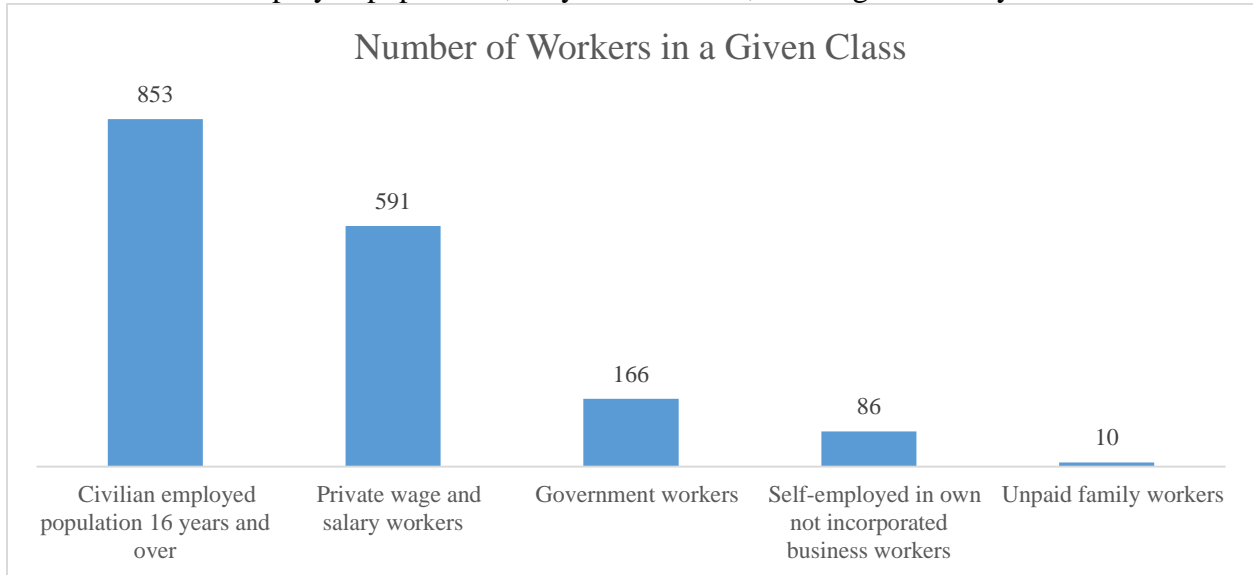
Source: Bureau of Labor Statistics



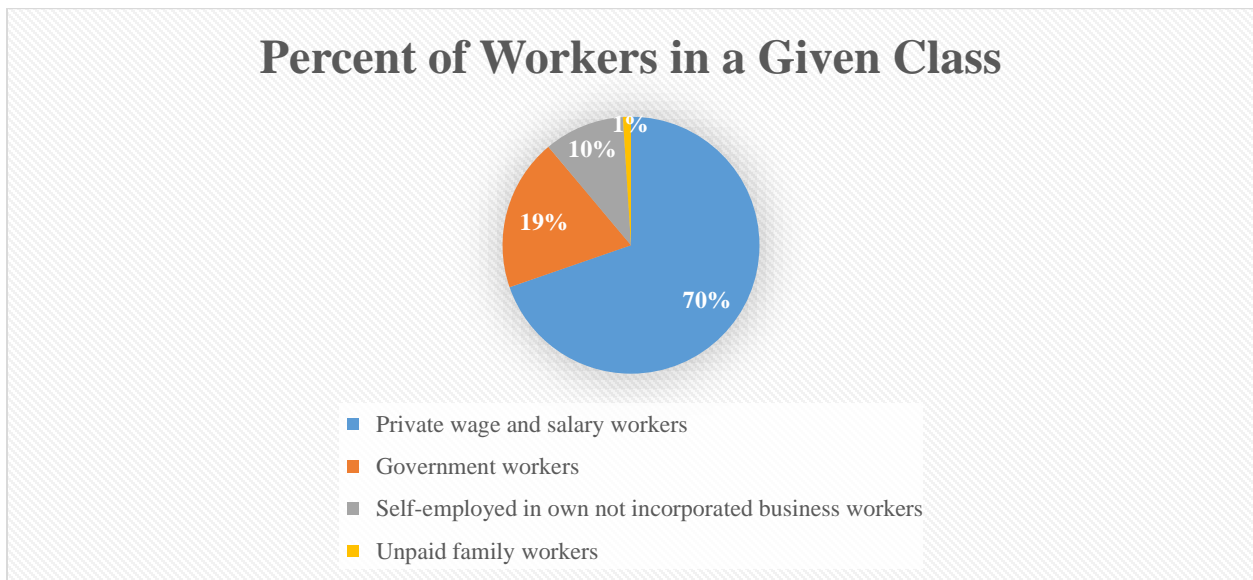
Source: Bureau of Labor Statistics

ESTIMATED EMPLOYMENT BY ECONOMIC SECTOR, 2010

The total civilian employed population, 16 years and over, in Meagher County is 853.



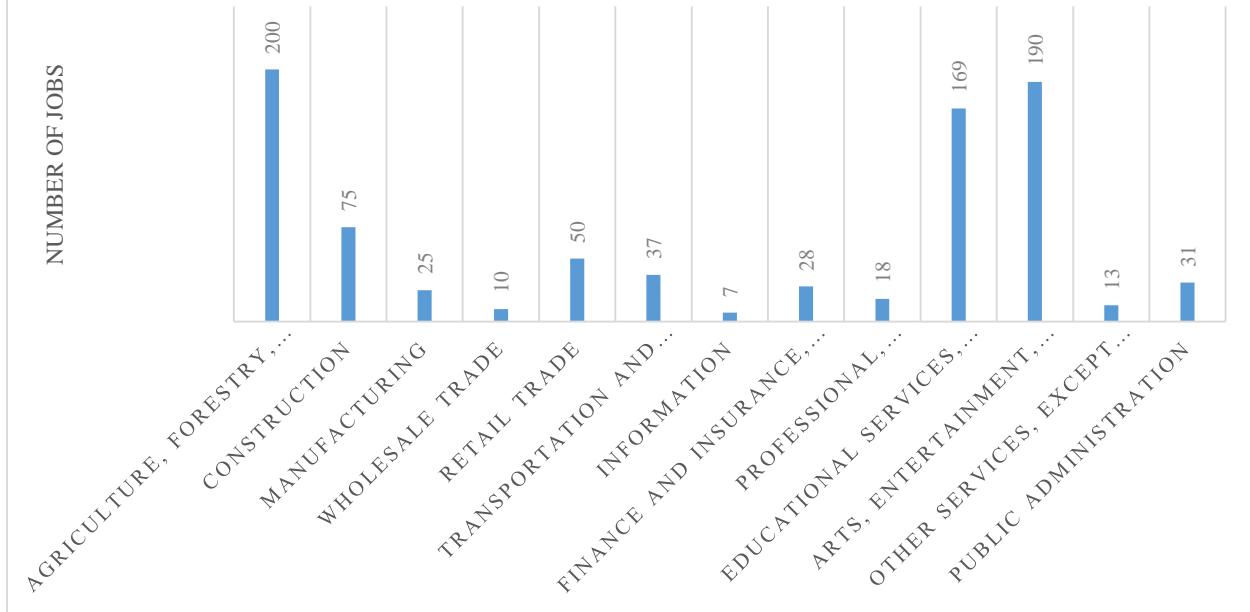
Source: US Census Bureau



Source: US Census Bureau

The following column chart shows the number of full-time and part-time jobs for the civilian employed population, 16 years and over, in Meagher County.

EMPLOYMENT BY ECONOMIC SECTOR



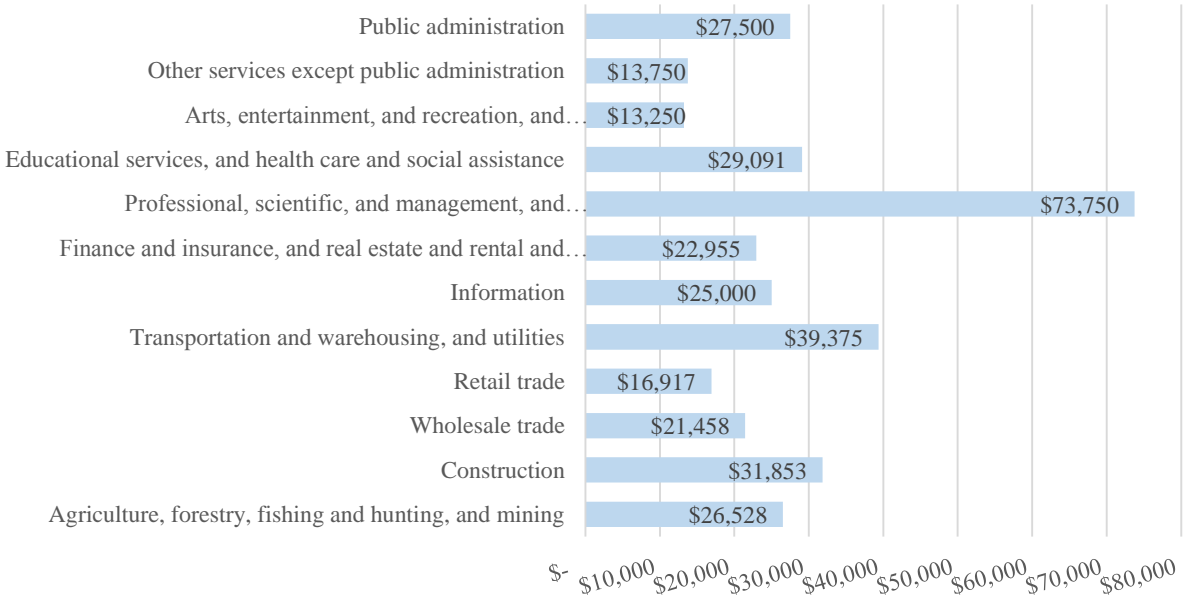
Source: U.S. Census Bureau, 2008-2012 American Community Survey

The table below lists the location quotients (with 1 or higher being an export industry) by industry for Meagher County. The quotient is derived by dividing the number of jobs in an industry by the total number of jobs in Broadwater County. That number is then compared to the same ratio for the national level. A score of 1 or more indicates an industry employs more persons than the national level, meaning that the industry is profitable in the area and exports products.

| Location Quotients calculated from Quarterly Census of Employment and Wages Data | | | |
|--|----------------|---|----------------|
| Industry | Meagher County | Industry | Meagher County |
| Base Industry: Total, all industries | 1 | NAICS 484 Truck transportation | 2.99 |
| NAICS 112 Animal production and agriculture | 98.52 | NAICS 721 Accommodation | 3.45 |
| NAICS 236 Construction of buildings | 2.24 | NAICS 722 Food services and drinking places | 1.18 |
| NAICS 445 Food and beverage stores | 1.84 | NAICS 813 Membership associations and organizations | 1.51 |

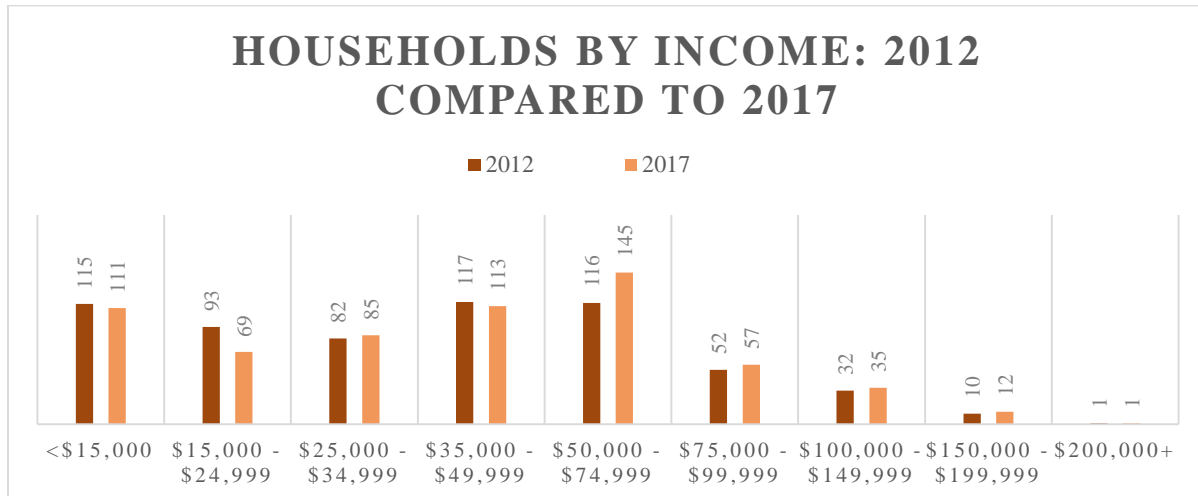
MEDIAN EARNINGS BY INDUSTRY

Median Earnings by Industry, 2010



Source: U.S. Census Bureau, 2008-2012 American Community Survey

In Meagher County for the year 2012, the median household income was \$37,304 with an average household income of \$45,857. By the year 2017, the median household income is expected to grow to \$40,617 with the average household income increasing to \$48,689. This shows that the region is decreasing compared to the national median average, going from 74.37% to 71.39% of national averages. The following graph depicts the projected change in number of persons in a given income range:

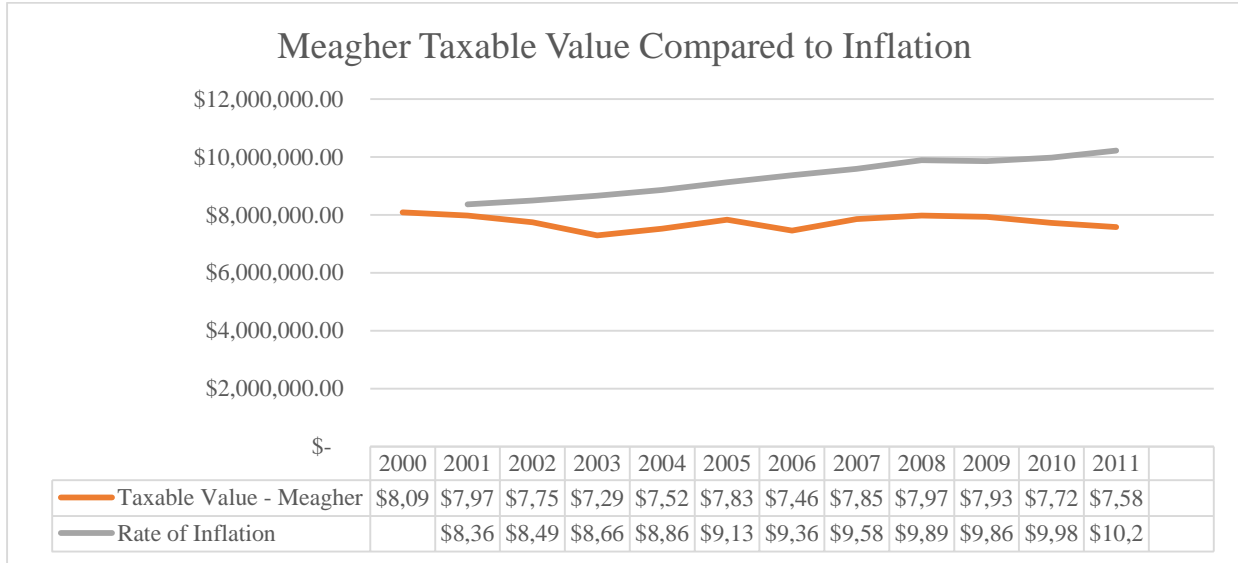


Source: US Census Bureau

Economy – Public Sector

TAXABLE VALUE AND GOVERNMENT SPENDING

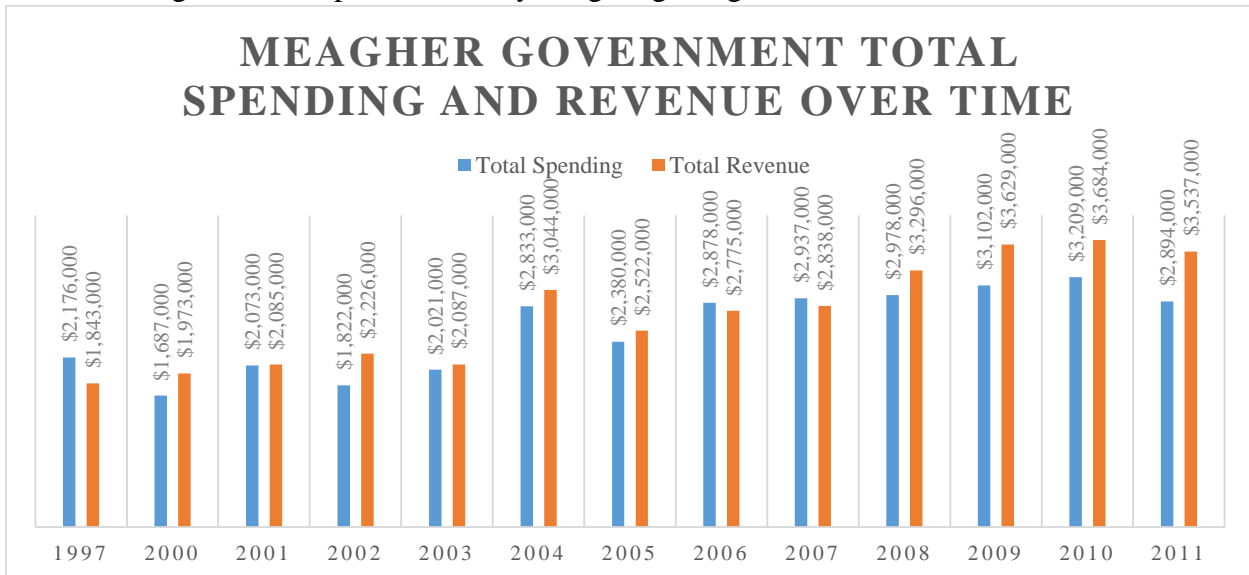
The following graph shows the change in taxable value for Meagher County from 2000-2011. The orange line depicts the taxable value, the grey line depicts inflation over that same time period.



Source: The Montana Tax Foundation

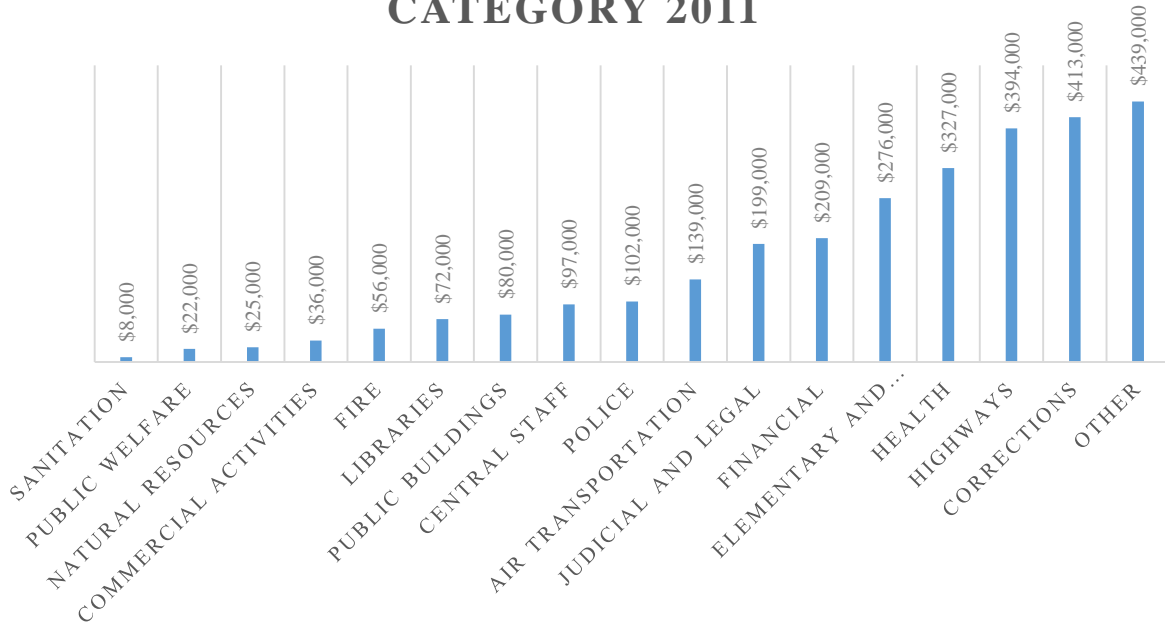
As demonstrated by this graph, the taxable value of Meagher County has been stagnant over the past 12 years, thus not keeping up with inflationary costs that are associated with providing services.

The following 5 charts depict the County budgeting categories and costs of services.



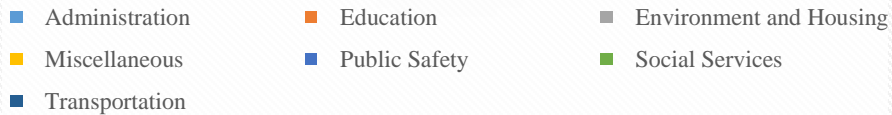
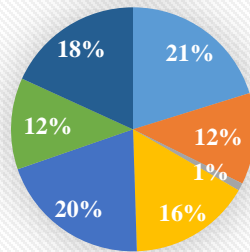
Source: US Census Bureau

MEAGHER GOVERNMENT SPENDING BY CATEGORY 2011



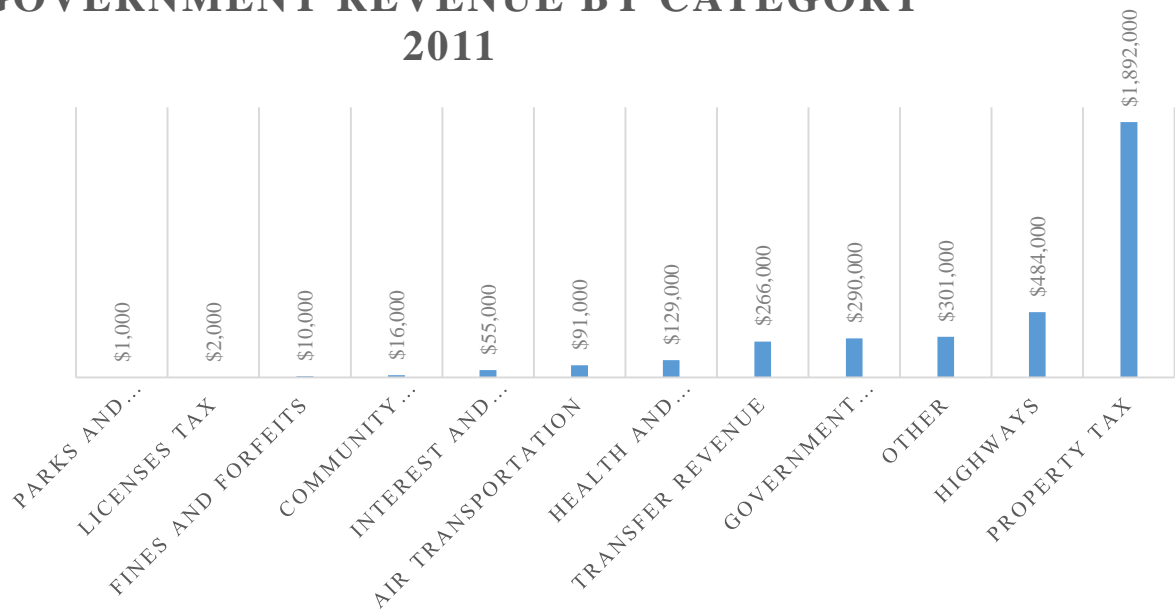
Source: US Census Bureau

Meagher Government Spending by Category (%)



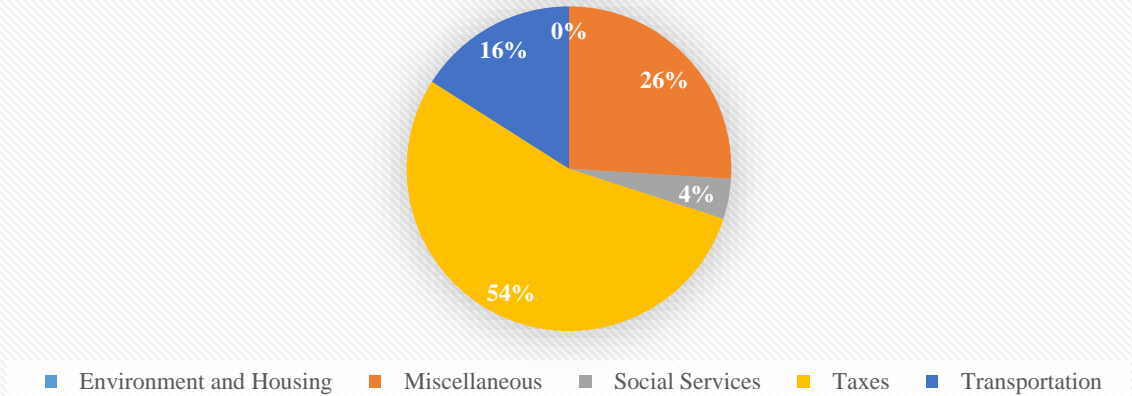
Source: US Census Bureau

GOVERNMENT REVENUE BY CATEGORY 2011



Source: US Census Bureau

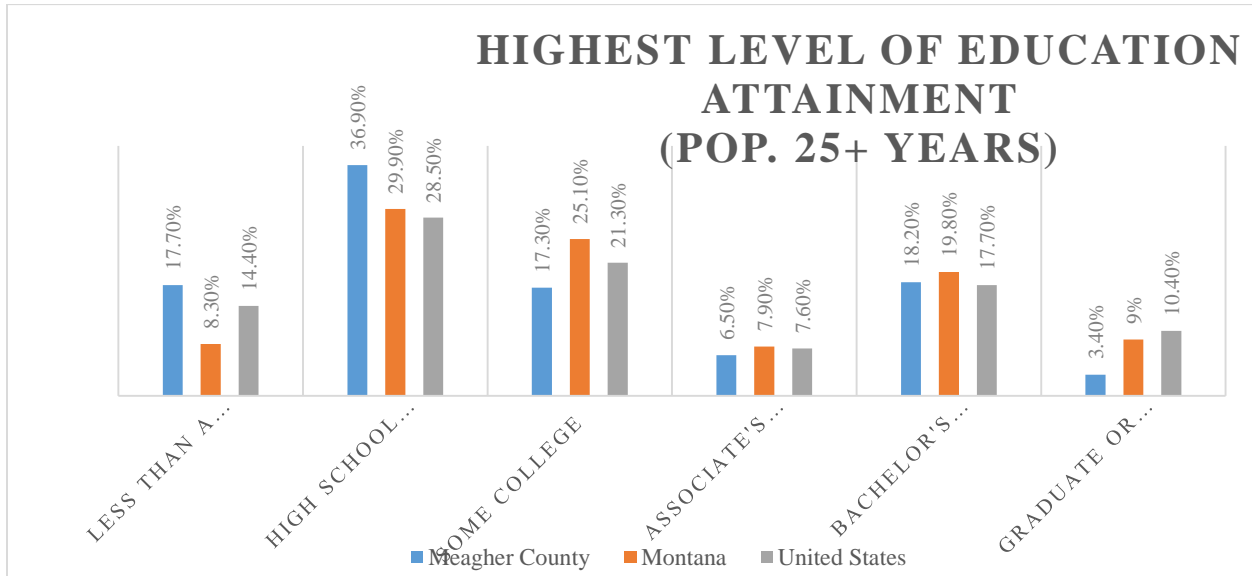
Meagher Government Revenue By Category (%)



Source: US Census Bureau

Education

The chart below displays the highest level of educational attainment in persons aged 25 or more.

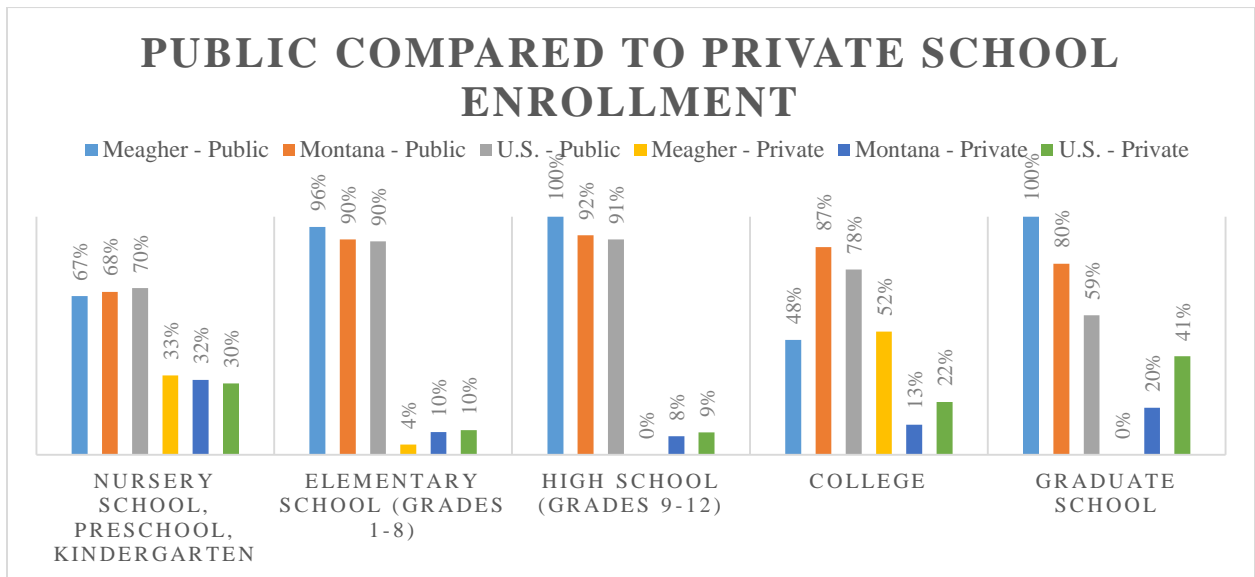


Source: U.S. Census Bureau, American Community Survey 2010 (US & MT), and 2005-2009 estimates (county)

As the chart shows, the percent of persons over the age of 25 in Meagher County with less than a high school diploma (17.7%) which is much higher than the Montana overall average of (8.3%) as well as the United States (14.4%). Meagher County is also much lower in percentages of persons who go on to post-secondary education.

There are two schools in Meagher County. Both of the schools are located in White Sulphur Springs. The White Sulphur Springs Elementary School teaches grades K-8 and has an enrollment of 125 students. The elementary school employs 7 teachers—1 for each grade except for 2nd—and 10 classrooms. The White Sulphur Springs High School has an enrollment of 76 students and employs 9 teachers. The high school has 14 classrooms. 6 of the faculty members are shared between the elementary school and high school.

| School Name | City | Number of Students | Female Students | Male Students | Female-Male Student Ratio |
|-----------------------------------|-----------------------|--------------------|-----------------|---------------|---------------------------|
| White Sulphur Springs Elementary | White Sulphur Springs | 125 | 52 | 73 | .71 |
| White Sulphur Springs High School | White Sulphur Springs | 76 | 42 | 34 | 1.24 |
| White Sulphur Springs 7-8 | White Sulphur Springs | 32 | 12 | 20 | .60 |
| Lennepe School | Martinsdale | 4 | 1 | 3 | .33 |



Source: US Census American Community Survey

To learn more about the education system in Meagher County, visit their website at:

www.whitesulphur.k12.mt.us.

Health, Medical, and Emergency Services

LAW ENFORCEMENT

Meagher County Sheriff's Department

The Meagher County Sheriff's Department employs 3 full-time officers, the sheriff, 5 full-time dispatchers, 1 part-time dispatcher. Currently, a position is open for 1 part-time dispatcher.

FIRE PROTECTION

City of White Sulphur Springs V.F.D.
Meagher County Fire
Martinsdale Fire Service Area
Grassy Mountain Rural Fire District

Meagher County has four fire protection agencies: The City of White Sulphur Springs V.F.D., Meagher County Fire, Martinsdale Fire Service Area, and Grassy Mountain Rural Fire District. In total, Meagher County has 12 structure trucks, 7 tenders, 58 volunteer fire personnel, and 1 Ario Bucket Truck. There are 8 pressurized hydrants in the town of Martinsdale and 11 dry hydrants in the county.

HOSPITAL AND NURSING HOME

Mountainview Medical Center

Mountainview Medical Center—based in White Sulphur Springs—provides inpatient, outpatient, and long term care as well as diagnostics and emergency services to all of Meagher County. The center has 25 beds, 4 day nurses, 3 night nurses, 2 Physicians Assistants, and 1 Doctor. The facility was remodeled in 2004 with the original building footprint. The remodel included making changes and updates to the lab, x-ray room, emergency room, patient rooms, and some of the office spaces.

EMERGENCY MEDICAL

Meagher County Disaster and Emergency Service

In Meagher County, there are 18 licensed EMT's and 3 ambulances to provide emergency medical services to the residents.

Municipal Services

| | Community Infrastructure Systems | |
|-------------------|---|---|
| | White Sulphur Springs | Martinsdale |
| Water | Ground/Surface Water Treatment* | Ground/Surface Water Treatment* |
| Wastewater | Facultative Lagoons | Facultative Lagoons |
| Power | Overhead/Underground Northwestern Energy | Overhead/Underground Northwestern Energy |
| Thermal | Heating Oil/Propane | Heating Oil/Propane |
| Traffic | Rural | Rural |
| Railroad | N/A | N/A |
| Airport | White Sulphur Springs Airport | N/A |

White Sulphur Springs is supplied with drinking water by a combination of two wells and Willow Creek. The creek supply is serviced through a sand filter and this supply along with the water supplied by the two wells is treated with chlorine. The town's water system is gravity driven and distributes its water to the 948 residents through a system of two- to twelve-inch PVC and steel pipes. The system holds 450,000 gallons of fire reserves in a buried concrete tank and has fire service hydrants evenly spaced on two block intervals around town.

The White Sulphur Springs water supply is currently functioning under a demand of 300,000 gallons per day and has no water quality or supply capacity issues. Most of the town's water supply is provided by Willow Creek while the wells are used to supplement the supply when needed. Currently the well pumps are used every other day.

The White Sulphur Springs water system includes approximately two miles of twelve-inch steel pipe. This pipe was installed in 1948 and due to leakage concerns is in need of rehab. A total of 6,000' of pipe was replaced in two phases during 2007 and 2012. The water storage tank was replaced in 2013.

White Sulphur Springs' wastewater system, according to the White Sulphur Springs Public Works Department, functions on a gravity operated system of six- to eight-inch clay and asbestos pipes delivering wastewater to two ten-acre facultative lagoons. Wastewater from eight to ten residents in one section of town is pumped through a lift station to the lagoon. Effluent from the lagoon system is discharged to the Warm Springs Ditch.

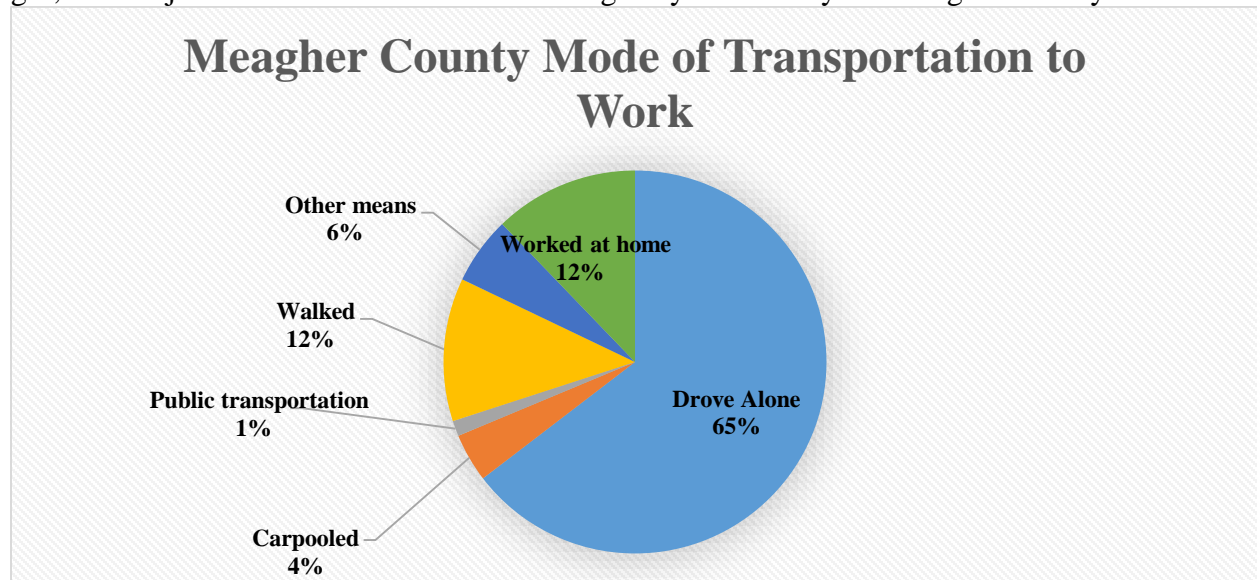
The wastewater system was designed for a population of 2,500 residents. Currently the town's population is 948 according to the 2000 Census, and the wastewater system is functioning at under half of its influent capacity with no current needs. Changes in wastewater discharge regulations may adversely affect the capacity of the current system.

Utilities

Electric power is provided by Northwestern Energy within the Town and County. Phone and internet services are provided by Triangle Communication and includes fiber optic cable directly to properties in most of the region. This is a significant accomplishment and will provide the region with a quality internet backbone that rivals the best in the state. Propane and heating oil is used in the region. Natural Gas is not available.

Transportation

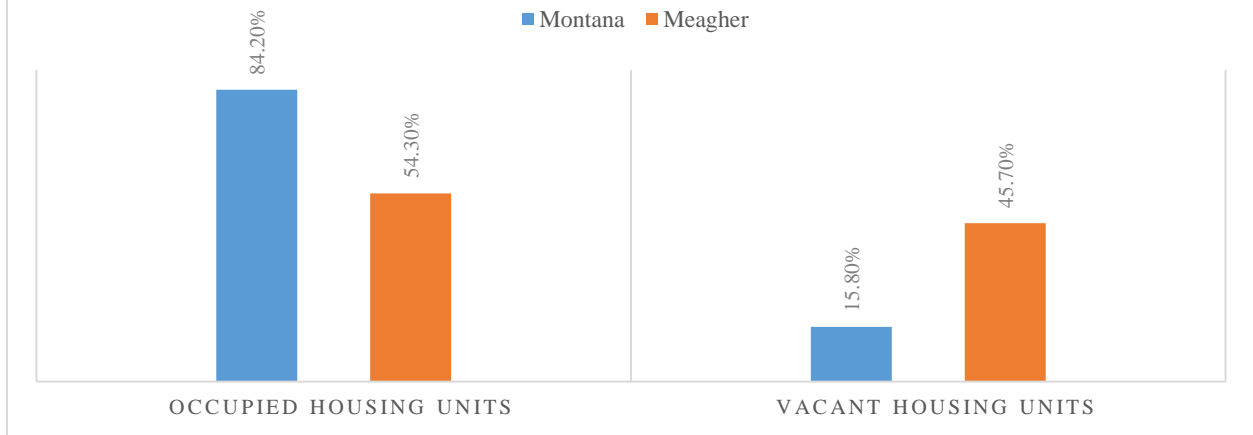
Transportation throughout the region is provided by Montana highways, County and City roads and streets. There is a County airfield south of White Sulphur Springs. The facility has aviation gas, but not jet fuel. There are no interstate highways or railways in Meagher County.



Housing Stock and Characteristics

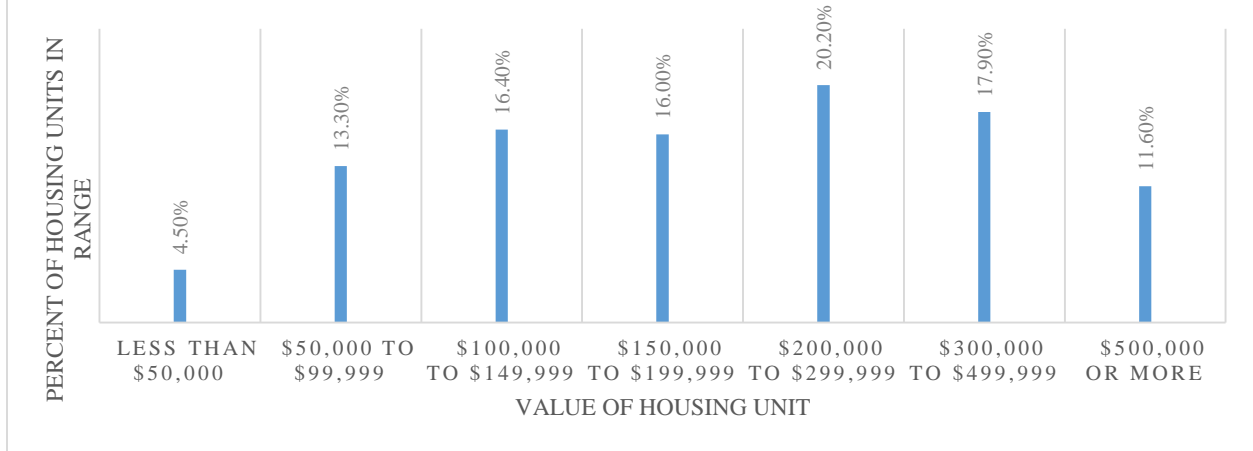
In 2010, the U.S. Census showed 1,432 total housing units in Meagher County, an increase of 69 units between 2000 and 2010. Of the total units, 806 were occupied and 626 were vacant. Of the vacant units, 77% were purposed for seasonal, recreational, or occasional use.

PERCENT OF OCCUPIED AND VACANT HOUSING UNITS

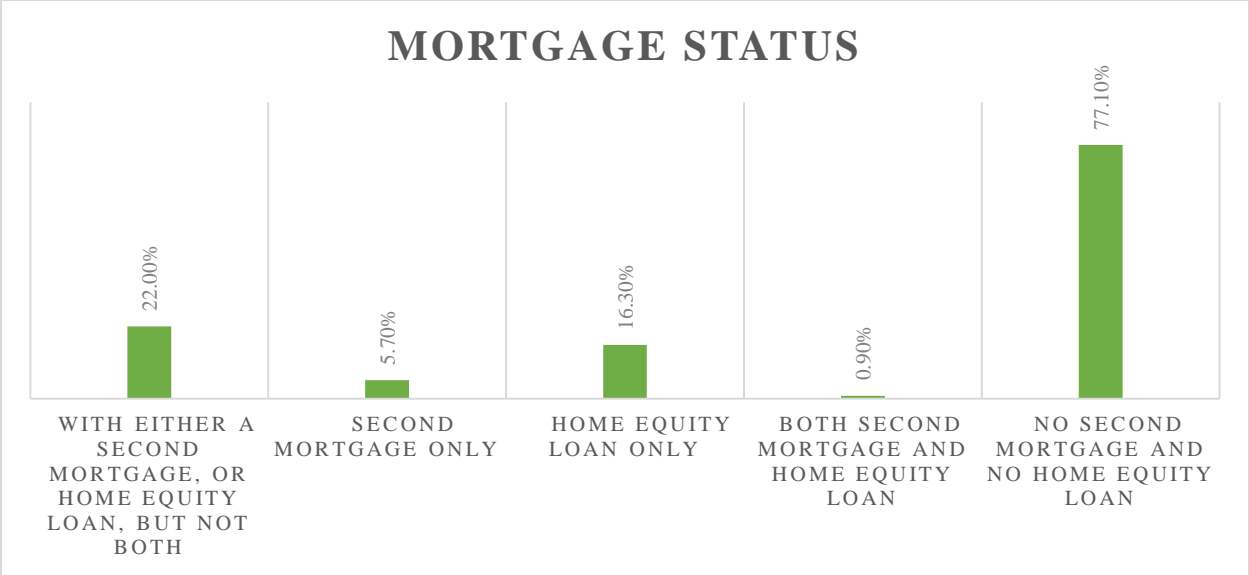


Source: US Census Bureau

VALUE OF OWNER-OCCUPIED HOUSING UNITS WITH A MORTGAGE

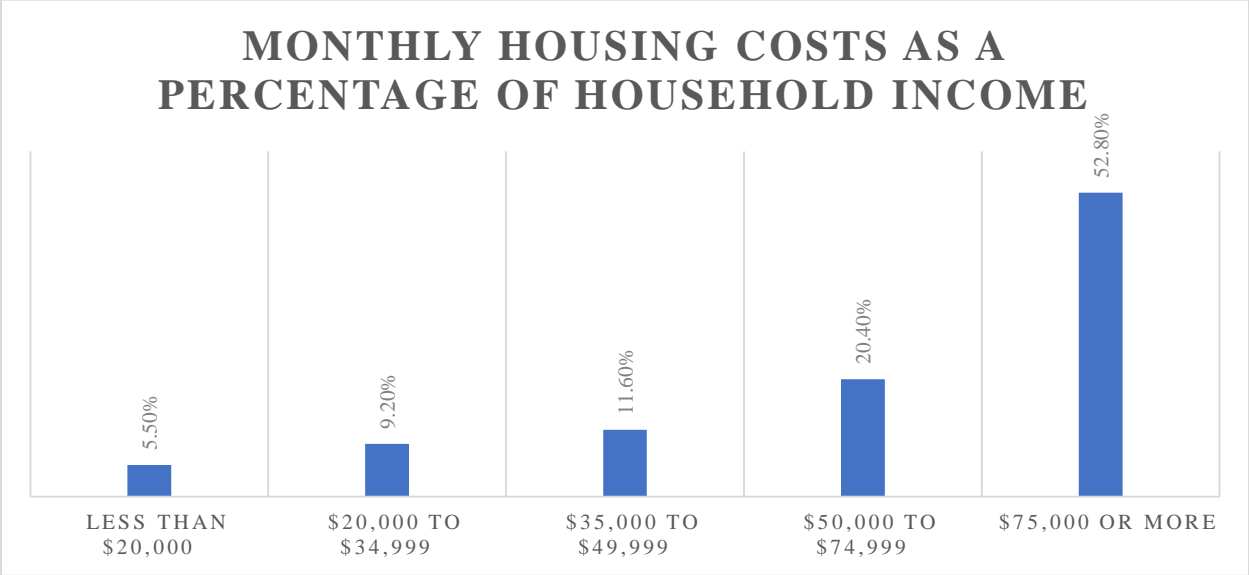


Source: US Census Bureau



Source: US Census Bureau

Of Meagher County’s population, 1,288 people reside in owner-occupied housing units, 174 residents live in group quarters and 429 residents live in renter-occupied housing units.



Source: US Census Bureau



Source: US Census Bureau

The following table shows the percentage of houses that were built in each 10-year period:

| YEAR STRUCTURE BUILT | |
|----------------------|--------|
| 2010 or later | 0.00% |
| 2000 to 2009 | 9.80% |
| 1980 to 1999 | 20.80% |
| 1960 to 1979 | 24.90% |
| 1940 to 1959 | 15.40% |
| 1939 or earlier | 29.10% |

Source: US Census 2010

Agriculture

| AGRICULTURAL STATISTICS FOR MEAGHER COUNTY | | | |
|--|----------------|----------------|-------------|
| | 2007 Census | 2002 Census | % Change |
| FARMS | | | |
| Farms: (number) | 138 | 136 | 1% |
| Land in farms (acres) | 812412 | 857215 | -5% |
| Average size of farms (acres) | 5887 | 6303 | -7% |
| Median size of farms (acres) | 1156 | 3600 | -68% |
| Farms by size: (number) | | | |
| Less than 1,000 acres | 67 | 54 | 24% |

| | | | |
|--|-------|-------|------|
| 1,000 acres or more | 71 | 82 | -13% |
| Farms by value of products sold: (number) | | | |
| Less than \$100,000 | 92 | 90 | 2% |
| \$100,000 or more | 46 | 46 | 0% |
| Farms by type of organization: (number) | | | |
| Family, Individual, Partnership | 110 | 110 | 0% |
| Corporation, Cooperative, Trust | 28 | 26 | 8% |
| LIVESTOCK INVENTORY AND CROPS HARVESTED | | | |
| Livestock and Poultry Inventory (number) | | | |
| Cattle and calves | 46296 | 45467 | 2% |
| Sheep and lamb | | 4961 | |
| Horses and ponies | 688 | 825 | -17% |
| Bison | 310 | 133 | 133% |
| Crops Harvested (acres) | | | |
| Wheat for grain, All | 10458 | 10082 | 4% |
| Winter wheat for grain | 6206 | 6302 | -2% |
| Spring wheat for grain | 4252 | 3780 | 12% |
| Oats for grain | 700 | 1124 | -38% |
| Barley for grain | 5855 | 11850 | -51% |
| Hay, haylage, grass silage | 40281 | 47418 | -15% |
| OPERATOR DEMOGRAPHICS | | | |
| Primary occupation: (number) | | | |
| Farming | 81 | 104 | -22% |
| Other | 57 | 32 | 78% |
| Place of residence: (number) | | | |
| On farm operated | 98 | 113 | -13% |
| Not on farm operated | 40 | 23 | 74% |
| Years on present farm: (number) | | | |
| Less than 10 years | 35 | 30 | 17% |
| 10 years or more | 103 | 106 | -3% |
| Age group: (number) | | | |
| Under 55 years | 63 | 66 | -5% |
| 55 years and over | 75 | 70 | 7% |
| Average age of operators: (number) | 56.8 | 55.5 | 2% |
| Source: US Department of Agriculture | | | |

Natural Resource and Environmental Issues

With the exception of White Sulphur Springs' wastewater system the majority of the wastewater in Meagher County is disposed of through individual private septic systems. As the population of Meagher County is small and dispersed over a larger area the volume and concentration of wastewater is minimal. Very little data is available characterizing the groundwater supply aquifers and the influence of wastewater disposal on the groundwater quality in the county. The Montana Bureau of Mines is currently compiling information to further detail the aquifer and groundwater quality characteristics in this region.

Meagher County is well known for thermal features. According to the DEQ website, "A wide thermal area, three to four miles wide, displays elevated surface-soil temperatures. This thermal anomaly provides the heat source for the Spa in White Sulphur Springs, but is also present at other locations in the region. Geothermometers indicate a potential deep reservoir temperature of 125 C. The USGS and MSU conducted several studies in the 1980s but could not locate a hotter source area. DEQ page with chemistry for the region.

<http://deq.mt.gov/energy/geothermal/sites/whiteslp.mcp>

Meagher County has been a producer of timber for the Lumber industry for many years. RY Timber maintains lumber mills both in Livingston and Townsend and are the nearest markets for timber to produce stud grade lumber. In recent years it has proven to be very difficult to source timber from federal lands. Private land owners with forested properties have been managing their properties and selling timber into regional mills. An epidemic of Pine Bark Beetle as well as other invasive species have infested the forested regions in the County. Much of the affected timber has not been harvested, and at this time is no longer viable for use as saw logs.

The region around Meagher County has been actively explored for oil and gas resources for many years. In 2008, Bill Barrett Corp and Devon Energy explored the Cody Shale formation in the southern reaches of the County associated with the Rocky Mountain Overthrust Belt. At this time the Bill Barrett Corporation lists the Cody Shale formation as a Natural Gas reserve in their held lands.

Mining has been a historic industry in Meagher County and is seeing a renaissance in the region due to increase commodity prices. Currently 10,000 short tons of iron ore are mined from an open pit mine north of White Sulphur Springs for use at the Holcum Cement Plant in Logan. Tintina Resources is developing a Copper/Cobalt deposit for commercial production using an underground audit.



Historically the region is well known for placer gold on the east slopes of the Big Belt Mountains, Copper in the Little Belt Mountains and Silver deposits in the Castle Mountains. The entire region has many other shows of mineralization.

Below are links to the major mining districts that are located in Meagher County:

<http://www.deq.mt.gov/abandonedmines/linkdocs/131tech.mcpx>

<http://www.deq.mt.gov/abandonedmines/linkdocs/132tech.mcpx>

<http://www.deq.mt.gov/abandonedmines/linkdocs/133tech.mcpx>

<http://www.deq.mt.gov/abandonedmines/linkdocs/134Atech.mcpx>

<http://www.deq.mt.gov/abandonedmines/linkdocs/134tech.mcpx>

Natural Resources of other note in the region are large deposits of gypsum in the north of the County along the Smith River.

For an interactive map of known mineral deposits in Meagher County, follow this link to the MBAC website. From this site you can gain access to layers that are used in Google Earth and identify historic deposits with associated known data.

www.MBAC.biz/Mineralization.php

Disaster and Economic Recovery and Resiliency Strategy

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

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

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

In the event of a disaster, the Montana Business Assistance Connection (MBAC), in conjunction with its regional partners, is prepared to facilitate planning and recovery efforts as outlined in the following strategy document. However, this brief strategy is in no way intended to undermine or replace existing federal, state, or local disaster plans. This document simply establishes the District's role in both pre- and post-disaster planning and recovery.

Phase I: Pre-disaster Preparedness

The MBAC supports and encourages its communities to:

- Engage in pre-disaster recovery and mitigation planning
- Regularly assess the community's risks and vulnerabilities
- Inventory and organize the community's recovery resources
- Engage in business continuity planning
- Ensure resources are available for the elderly and those with special needs
- Identify shelters
- Identify recovery partners, as well as the type of assistance and resources they can provide
- Establish a timeline for recovery activities (immediate, short-term, intermediate, and long-term)
- Develop and disseminate a community evacuation plan
- Establish a communication chain
- Engage the community's residents in the planning and recovery process

Regional Risks and Vulnerabilities

The MBAC region is vulnerable to a wide variety of disasters including, but not limited to, fires, flooding, chemical/biological warfare, dam failure, drought and extreme heat, freeze events and extreme cold, earthquakes, hazardous materials, landslides, nuclear attack, tornadoes, vector-borne diseases, volcanic fallout, violence, and terrorism.

Recovery and Mitigation: MBAC Regional Challenges

- Small population dispersed over a large area
- Lack of comprehensive services
- Isolation/lack of access
- Limited options for transmitting information
- Possibility for widespread interruption of services
- High percentage of stationary, at-risk population (elderly)
- Lack of economic diversity, loss of “one” may mean loss of “all”
- Limited transit options
- Limited incomes
- Few liquid assets, significant amount of money tied up in land and equipment
- Vulnerable infrastructure, including historic sites and structures
- Heavy reliance on imported materials and food

Recovery and Mitigation Planning

Without being prepared for the complexity of redevelopment in a compressed timeframe following a major disaster, local officials may struggle with recovery decisions and miss opportunities for public participation in reshaping the community’s future. To become more disaster-resilient, local governments should plan for what must happen after rescue and recovery operations are completed in order to return the community to normal or perhaps rebuild an even better community. Through a Post-Disaster Redevelopment Plan (PDRP or Plan), local governments can collaboratively create a long-term recovery and redevelopment strategy in pursuit of a sustainable community.

Plans identify policies, operational strategies, as well as roles and responsibilities for implementation that will guide decisions affecting long-term recovery and redevelopment of the community after a disaster. They emphasize seizing opportunities for hazard mitigation and community improvement consistent with the goals of local and regional comprehensive plans, with full participation from the area’s citizens.

There are three principal benefits to having a well-developed Plan:

1) Faster and More Efficient Recovery

Without a comprehensive, long-term recovery plan, ad hoc efforts in the aftermath of a significant disaster will delay the return of community stability.

Creating a process to make smart post-disaster decisions and prepare for long-term recovery requirements enables a community to do more than react, prompting post-disaster action rather than time-consuming debate. By identifying appropriate planning mechanisms, financial assistance, and agency roles and responsibilities beforehand, a community begins the road to recovery more quickly. Being able to show efficient and effective use of taxpayer dollars after a disaster is incredibly important for the public's perception of the recovery.

2) Opportunity to Build Back Better

A disaster, while tragic, can also create opportunities to fix past mistakes or leap forward with plans for community improvements. In the immediate aftermath of a disaster, local officials are under significant pressure to restore the community to its pre-disaster condition. Without a guiding vision, short-term decisions may inadvertently restrict long-term, sustainable redevelopment and overlook opportunities to surpass the status quo. A Post-Disaster Redevelopment Plan strengthens the recovery process, and communities benefit from assessing their risk levels and crafting a long-term redevelopment plan under "blue skies." Local officials and the public can thoughtfully analyze and debate issues, linking redevelopment goals with other important community plans.

Careful thought and planning achieves a more sustainable and resilient outcome than decisions made under emergency circumstances, compromised budgets, and political pressures.

3) Local Control over Recovery

Developing a PDRP provides local government officials, residents, and businesses the opportunity to determine long-term redevelopment goals and develop policies and procedures that will guide redevelopment before well intended outside agencies and non-government organizations rush to aid the community. While outside resources are needed and welcomed in a major or catastrophic disaster, a locally developed Plan will best channel those resources to effectively meet the community's specific needs and goals. A Post-Disaster Redevelopment Plan will show outside agencies and donors that the community is prepared to play an active role in the recovery process and promote its capabilities to wisely use donated and loaned resources. There will always be rules and, occasionally, strings attached to external sources of funding, but a community that has researched the allowable uses of federal and state assistance can better work within their boundaries in an effort to fund projects that further local and regional redevelopment goals.

CAN A DISASTER PROVIDE OPPORTUNITY TO ADVANCE YOUR COMMUNITY'S VISION?

The MBAC's communities participated in the region's comprehensive planning process. PDRPs can identify disaster scenarios in which opportunities may be present to advance already-stated visions for these communities in a compressed timeframe.

Opportunities to Consider During Post-Disaster Redevelopment:

- Disaster-resilient land use patterns
- Hazard mitigation construction techniques
- Energy-efficient buildings
- Healthy community design
- Affordable or workforce housing
- Alternative transportation networks
- Environmental preservation and habitat restoration
- Sustainable industry recruitment

Tornadoes, wildfires, floods, and other disasters do not confine themselves to jurisdictional boundaries. Displaced residents, compromised infrastructure, changes in economic conditions, hazardous materials contamination, and degradation of sensitive environments are some of the impacts that can affect an entire region after a major disaster. When recovery is slow, neighboring communities also experience these impacts for an extended period of time.

A PDRP is designed to be used in any disaster, regardless of type, as long as the damage will require long-term redevelopment efforts. It is an all-hazards plan addressing disasters identified in each county's Local Mitigation Strategy (LMS) and each community's Emergency Operations Plan (EOP). As an economic development organization serving Carter, Dawson, Fallon, Prairie, and Wibaux Counties, the MBAC will respond accordingly, utilizing the resources and information outlined in the region's CEDS document. Therefore, counties are encouraged to incorporate PDRP strategies into their disaster planning documents.

Disaster Phases and Redevelopment

Disaster management is typically viewed as a cycle with overlapping phases: 1) pre-disaster mitigation and emergency management preparedness; 2) emergency response; 3) short-term recovery; and 4) long-term recovery and redevelopment.

Pre-Disaster Phase – Mitigation and recovery planning occurs during the pre-disaster phase (unless a community is struck by a disaster before planning is complete). Once a mitigation and recovery plan is adopted, preparatory activities should be implemented on an on-going basis during normal operations, which are sometimes referred to as "blue skies." Plans should be

tested prior to a disaster event, so that all stakeholders with a post-disaster implementation role are familiar with their responsibilities.

Emergency Response Phase –Emergency response activities are specifically addressed in a municipality’s EOP and include immediate actions to save lives, protect property, and meet basic human needs. This is the shortest phase of the cycle, lasting only a few days in minor disaster conditions.

Short-Term Recovery Phase – The role of any plan during the short-term recovery phase is to begin organizing for long-term redevelopment activities and guiding short-term recovery decisions that may have long-term implications (e.g., placement of temporary housing or debris sites). Short-term recovery operations are addressed in EOPs, but a recovery plan can provide direction for transitioning to long-term redevelopment during this phase. The short term recovery phase begins as the emergency response phase is winding down and will continue until critical services are restored. The duration of the short-term recovery phase depends on the severity of the disaster and the level of community preparedness.

Long-Term Recovery and Redevelopment Phase – A recovery plan is used most during this phase. Long-term recovery and redevelopment includes efforts to reconstruct and enhance the built environment, as well as recover the economy, environment, and social systems. This phase begins as short-term recovery activities are accomplished and can last from a couple years for a minor disaster to five or more years for a major or catastrophic disaster.

Interaction with Other Plans

The objective of this “Disaster and Economic Recovery and Resiliency Strategy” is to guide the redevelopment decision-making process following a disaster in a manner consistent with local comprehensive plans (especially Future Land Use maps, where applicable), Local Mitigation Strategies, Emergency Operation Plans, and other relevant plans or codes, such as land development regulations. Each of these plans, and potentially others, has pre-existing policies or procedures that affect post-disaster redevelopment. For instance, local comprehensive plans include many policies that determine where and to what extent redevelopment can occur. Ultimately, the MBAC will help its counties and communities access the information and resources necessary for making post-disaster redevelopment decisions.

MBAC Region: Disaster and Emergency Services (DES) Contact Information

Michael Koehnke - Broadwater County
P.O. Box 506
Townsend, MT 59644
406-949-3522

http://townsendmt.com/chd_sec4pg15.asp

Paul Spengler – Lewis & Clark County
221 Breckenridge
Helena, MT 59601
406-447-8285
<http://www.lccountymt.gov/des.html>

Rick Seidlitz - Meagher County
P.O. Box 469
White Sulphur Springs, MT 59645
406-547-4290
www.lepc.meaghercounty.net

Phase II: Post-disaster Planning and Implementation

Disaster Assessment

In the days and weeks following a disaster, the MBAC will be available to assist counties and communities:

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

Develop and/or Implement Recovery Timeline

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

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

Implementing the Recovery Plan (long-term recovery)

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

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

Prioritizing Areas to Focus Redevelopment

Limited time, funds, and materials are going to make simultaneous redevelopment of all damaged areas difficult.

Communities may want to encourage redevelopment in areas that correspond to their vision for the future and those less vulnerable to disasters by prioritizing and incentivizing development in these areas. The best way to build resiliency to disasters is to direct future development to safe locations, while minimizing or mitigating highly vulnerable types of development in hazardous areas. After a disaster, targeted sustainable redevelopment areas can provide immediate opportunities for redevelopment since they will have sustained less damage and can be prioritized for infrastructure restoration and expedited permitting. Allowing for rapid redevelopment in safe areas intended for increased future development will minimize vulnerable redevelopment and/or allow time to plan the sustainable reconstruction of areas severely impacted by the disaster. Designated priority recovery and redevelopment areas can also be used to locate temporary post-disaster facilities more efficiently that are consistent with future land uses.

Historic Preservation and Restoration

The loss of historic resources due to a disaster can have a major impact on the community. Some losses may be unavoidable, but others could occur accidentally during recovery operations if procedures are not in place to watch for these concerns. Historic structures are particularly vulnerable to damage due to their age, and repair of these structures must meet certain requirements to maintain their character and historic designation. There may also be funding opportunities before or after a disaster for implementing mitigation measures to prevent further damage to historic resources. Engaging state and local historic preservation organizations in the planning and implementation process can ensure that the unique considerations involved with preserving and restoring historic structures and archeological sites are included in a community's recovery plan.

Reducing Disaster Vulnerability through Land Use and Development Regulations

The best practice for post-disaster redevelopment is to restrict rebuilding in hazardous locations and require mitigation where vulnerable redevelopment cannot be precluded. While this plan of action would ensure optimal community resiliency to disasters, it may be very difficult to achieve and may not be a good choice for the first action to be tackled when implementing any

recovery plan. However, with careful consideration of the legal implications concerning property rights and extensive public outreach, there are many regulatory tools for increasing disaster resiliency that may be a possibility for the region, especially if pursued during the post-disaster “window of opportunity” for future reductions in disaster vulnerability. Potential regulatory methods could include reduced intensity or density of use, special permit requirements, increased setbacks from hazard sources (e.g., a waterway or building, etc.), hazard-specific site design requirements, and/or increased structural mitigation requirements. These methods could be implemented through policies instituting lower damage thresholds requiring nonconforming uses/structures to meet current standards (in certain zones or throughout the jurisdiction), zoning overlay districts, post-disaster specific land development codes, and/or special assessment districts to fund mitigation projects that benefit more than one property.

ECONOMIC REDEVELOPMENT

The ability of a local economy to rebound after a disaster dictates the success of the community’s long-term recovery. The return of jobs, tourism, capital investments, and other indicators of economic health are dependent upon housing recovery, infrastructure restoration, environmental restoration, and social service provision. The involvement of the private sector in the post-disaster planning process is imperative for determining the priorities and actions that will be beneficial to restoring the local economy. Consideration must be given to the different obstacles that could potentially hinder economic recovery, such as those that small businesses will face, decisions large employers will have to make about whether to relocate, opportunities for sustainable diversification of the economic base, and job training and workforce recruitment needed to meet altered market conditions after a major disaster.

Resumption and Retention of Major Employers

Rapid resumption of existing major employers is key to a community’s economic recovery after a disaster, especially as employment provides a reason for most residents to return and rebuild quickly. Typically, the major employers in the region are already going to have business continuity plans and will not need the basic disaster preparedness education necessary for smaller businesses. These companies are often able to work with local governments as partners in planning for post-disaster redevelopment and provide insight as to what government assistance they will need to ensure rapid resumption. Major employers may also have the means to assist in actions to support workforce retention if included in the planning process. While large company recovery assistance will vary, typically businesses located in hazardous areas or older structures may need assistance to reopen or relocate, temporarily or permanently, within the area.

If businesses do not feel a sense of connection to the community or fear that recovery will not be successful, there is a chance that they will relocate their company elsewhere after a disaster. This is especially the case for corporate headquarters and industries that are not location-dependent or whose location choice is tied to quality of life factors. Mitigation and recovery plans provide the

private sector with confidence in the community's ability to continue providing the market environment necessary for conducting business. Some factors that may aid the retention of major employers include a high level of communication before and after a disaster about post-disaster redevelopment goals and expectations and/or incentives to ensure retention, if necessary.

Small Business Assistance

A "small business" is often perceived as a family-owned business that provides services solely to the local community. Small businesses comprise the majority of businesses in the MBAC region. Small businesses are more likely than large businesses to either never reopen after a major disaster or fail shortly after reopening.

Several factors may be involved in these failures, including the extent of damage to a community, timing of reopening, and lack of financial reserves.

Short periods without cash flow can be damaging, and small businesses often find restrictions and loan arrangements overwhelming. The region's SBDC Director will be on-hand to help guide businesses through the redevelopment process. The MBAC also has access to a certain RLF funds that may be available to businesses during post-disaster redevelopment. Loans are typically based on the pre-event business and tax returns of the firm and require extensive collateralization. Post-disaster market changes, however, may mean the company isn't able to do as well as it did pre-disaster, and the loan, even at below-market interest rates, sometimes becomes a burden to the long-term survivability of the business.

Workforce Retention

While trying to retain existing businesses, efforts must also address retaining the workforce that supports those businesses. Actions such as ensuring that schools reopen and childcare is available, allowing temporary on-site housing for employees, and communication of a community's post-disaster plan can assist in getting employees back to jobs as soon as the businesses have reopened.

After a disaster, the market for certain businesses may decrease or be eliminated due to financial troubles or customer demand changes. However, other industries may provide employment opportunities, such as the construction industry, which will boom temporarily due to rebuilding needs. Workforce training programs are important to provide residents with appropriate skill sets to fill newly available positions due to recovery efforts and to adjust workforce skills to other industries that may take a more permanent hold in the community due to post-disaster business recruitment efforts. Providing locals with first preference for temporary recovery work is important for keeping workers from moving out of the area.

Physical Economic Redevelopment Projects

In some circumstances, opportunities may arise after a disaster to move forward with planned physical economic development projects or to create new projects that take advantage of post-disaster funding, available land, or public will. Economic development projects that are disaster-resilient and fill a need in the community after a disaster should be a priority for post-disaster funding. In addition, the community can prioritize projects that incorporate energy efficiency and other “green” building design considerations. Business districts can be prime locations to focus post-disaster redevelopment projects since these districts offer financial tools or incentives, such as tax increment financing, reductions on impact fees, and state tax incentives. Economic leaders can also consider ways to expand these business districts and leverage funding that would be available through disaster programs from several federal agencies, including the Community Development Block Grant program and Economic Development Administration disaster assistance program.

Opportunities to Sustainably Restore Economic Vitality

Retaining existing businesses is the first priority after a disaster; however, post-disaster redevelopment may also present an opportunity for businesses to assess their long-term applicability in the local market and take advantage of any changes in demographics or business incentives that may occur due to disaster impacts and an influx in outside funding to the area. For instance, a business that was already struggling before the disaster may need to rethink its business plan and use the disaster as an entrepreneurial impetus unless it happens to be engaged in one of the few economic activities that benefit from a disaster, such as the development industry.

Inevitably, some large and small businesses that bear the brunt of significant damage or indirect losses are going to fail or choose to relocate after a major disaster. This can affect the unemployment rate of the county if new businesses do not replace those that relocate. Ideally, a community would have a diverse spectrum of businesses so that if one industry sector is severely impacted by a disaster, the majority of the workforce will not be affected.

Unfortunately, the MBAC region struggles with a lack of economic diversity, which means that in the event of a disaster the loss of one business could mean the loss off all the local benefits provided by that employer/industry.

Efforts to diversify the local economy with industries that are less vulnerable to disasters should be integrated into ongoing economic development activities. Industries targeted for attraction and incentive programs after a disaster should be those that will provide a more disaster-resilient and sustainable economy for the community and are appropriate for the post-disaster circumstances.

INFRASTRUCTURE AND PUBLIC FACILITIES

Restoration of infrastructure and critical public facilities after a disaster is a prerequisite for recovery –one that is addressed in local government and private utility and infrastructure

companies' emergency response and short-term recovery plans. There are long-term redevelopment considerations for infrastructure restoration, however, that must be weighed in conjunction with land use, environment, housing, and economic redevelopment issues.

Taking advantage of opportunities to upgrade, mitigate, or even relocate infrastructure or public facilities after a disaster is critical. Advanced planning allows a community to make deliberate decisions about redevelopment that it may otherwise have had less opportunity to do during the post-disaster rush to rebuild. Decisions about infrastructure reconstruction will influence private redevelopment decisions, and using disaster repairs as an opportunity to include hazard mitigation allows a local government to lead by example.

There are many agencies, jurisdictions, and stakeholders involved in providing infrastructure, public facilities, and utility services. Before and after a disaster, these private and public entities need to establish communication and coordination procedures to ensure that long-term recovery and redevelopment occurs in an efficient and organized manner. Each agency or company should have its own recovery plan; however, if any opportunities for directing redevelopment are to be pursued then coordination and communication are critical.

Types of Infrastructure and Public Facilities to Address in Post-disaster Redevelopment Planning

A community's infrastructure is made up of a number of different systems and structures, each of which should be considered carefully:

- *Transportation systems* – The repair of roads, bridges, railroads, airports, and public transit is essential to establishing normal operations within a community. The repair of these and other types of infrastructure is often necessary for other redevelopment efforts to take place. Post-disaster redevelopment can be used as an opportunity to modify, improve, and add to existing transportation networks. Incorporating hazard mitigation into the repair and reconstruction of transportation facilities can ensure that when disaster strikes again, the infrastructure is better able to handle the impacts.
- *Potable water, sewer, and stormwater systems* – Damage to potable water, sewer, and stormwater infrastructure can weaken a community's ability to recover. Like with other infrastructure, the community can take the opportunity to include hazard mitigation or other improvements during repairs. In cases of severe damage to infrastructure in highly hazardous locations, relocation could be considered. These opportunities may be missed if pre-planning is not conducted.
- *Power, natural gas, and telecommunications* – Recovery from a disaster cannot begin until major utilities, especially electricity, are restored.
- *Public facilities* – Rebuilding after a disaster provides an opportunity to mitigate future hazard impacts and build back a more resilient community. Public facilities, such as schools, libraries, and government offices must be rebuilt to current building codes.

However, above-code hazard mitigation may also be a good investment, and post-disaster funding sources may allow these expenditures. Some public facilities in highly hazardous areas could potentially be targeted for relocation during pre-disaster planning.

- *Parks and recreation facilities* – While parks and recreation facilities are typically not a priority for recovery, they are important for regaining quality of life as part of long-term redevelopment. Park properties also are often used in staging recovery efforts, such as temporary vegetative debris storage.

Financing Infrastructure and Public Facilities Repair

When a community starts to make decisions about which structures to relocate after a disaster or which mitigation projects it should invest in pre-disaster, they should consider funding availability. Knowing where to prioritize spending requires some basic knowledge of what is covered under insurance policies, which projects will be eligible for federal reimbursement through the Public Assistance Program, which projects can be funded through grant programs, and what financial reserves can be targeted for grant matching funds or local investment. When a community begins to address its infrastructure issues as part of the initial planning process or as a pre-disaster implementation action, it can launch an assessment of county or municipal insurance policies to determine which facilities are covered and for what extent of damage. They can then use this assessment to make decisions about increasing coverage or financing repairs to uninsured structures. They can also determine whether mitigation enhancements would be covered under current policies and Public Assistance or whether additional funding would be needed.

Public Assistance: Improved and Alternate Projects

Occasionally an Applicant may determine that improvements should be made while restoring a damaged facility; or even that the public would not be best served by restoring a damaged facility or its function at all. FEMA refers to these projects respectively as improved and alternate. All requests for these projects must be approved prior to construction.

Possible Alternate Projects

- Repair or expansion of other public facilities;
- Construction of new public facilities;
- Purchase of capital equipment; and
- Funding of hazard mitigation measures in the area affected by the disaster.

Possible Improved Projects

- Relocation of public facilities;
- Using improved materials;
- Expanding capacity, and

- Rebuilding to higher codes and standards

Conclusion

In the event of a disaster, the MBAC is committed to:

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

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