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**Flathead County, Montana
Comprehensive Economic
Development Strategy (CEDS)**



FLATHEAD VALLEY / GLACIER PARK REGION

October 31, 2017

Montana West Economic Development
and
Flathead County Economic Development Authority

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I. Introduction

A. What is a CEDS?

A Comprehensive Economic Development Strategy (CEDS) is local economic development plan that guides the economic growth of an area. The United State Economic Development Administration, (EDA) requires CEDS to qualify for planning programs and assistance related to public works and other economic development initiatives. The EDA notes that the purpose of a CEDS is to help, "... create jobs, foster more stable and diversified economies, and improve living conditions. It provides a mechanism for coordinating the efforts of individuals, organizations, local governments, and private industry concerned with economic development." A CEDS should result from a planning process that involves broad community participation to identify strengths, threats and opportunities in the region. Through this process, the CEDS will establish a vision for the community and include goals and the strategies that will help the community achieve this vision over the next five years.

B. Organizational Information

1. Montana West Economic Development (MWED)

MWED is a non-profit organization that is supported through membership dues. It serves all of Flathead County and oversees a variety of economic development projects throughout the county. MWED offers the following services:

- Business Loans
- Grant Writing and Administration
- Procurement Technical Assistance Center
- Business Planning
- Provide staff for the Flathead County Economic Development Authority

2. Flathead County Economic Development Authority (FCEDA)

In 1999, the Flathead County Commission voted to create the Flathead County Economic Development Authority (FCEDA) under the requirements of the Montana Code Annotated, Title 7: Local Governments, Chapter 14, Part 11 – Port Authorities. The MCA defines the purpose of a port authority as follows:

7-14-1104. Purpose -- public and governmental functions.

(1) The purposes of a port authority are to:

- (a) promote, stimulate, develop, and advance the general welfare, commerce, economic development, and prosperity of its jurisdiction and of the state and its citizens;
- (b) endeavor to increase the volume of commerce within the jurisdiction of the port authority and the state through planning, advertising, acquisition, establishment, development, construction, improvement, maintenance, equipment, operation, regulation, and protection of transportation, storage, or other facilities that promote the safe, efficient, and economical handling of commerce;

- (c) cooperate and act in conjunction with other organizations, public or private, in the development of commerce, industry, manufacturing, services, natural resources, agriculture, livestock, recreation, tourism, health care, and other economic activity in the state;
- (d) support the creation, expansion, modernization, retention, and relocation of new and existing businesses and industry in the state and otherwise stimulate, assist in, and support the growth of all kinds of economic activity that will tend to promote commerce and business development, maintain the economic stability and prosperity of its jurisdiction and of the state, and thus provide maximum opportunities for employment and improvement in the standard of living of citizens of the state.

(2) The acquisition of any land or interest in land pursuant to this part, the planning, acquisition, establishment, development, construction, improvement, maintenance, equipment, operation, regulation, and protection of port authority facilities, and the exercise of any powers granted to port authorities and other public agencies to be severally or jointly exercised are public and governmental functions, exercised for a public purpose, and matters of public necessity. All land and other property and privileges acquired and used by or on behalf of any authority or other public agency, as provided in this part, must be used for public and governmental purposes and as a matter of public necessity. A port authority may pledge, lease, sell, or mortgage all or any part of its facilities to secure bonds under this part as provided in [7-14-1133](#).

Per the MCA, the Flathead County Economic Development Authority (FCEDA) is supported by a two mill levy, set in place by the Flathead County Commissioners. Additionally, FCEDA works with outside funding sources to procure dollars for economic development projects, including state resources such as the Montana Board of Investments and the Montana Department of Commerce's Big Sky Economic Development Trust Fund Program. A volunteer board of seven county residents is appointed by the County Commissioners to explore economic development opportunities and manage port authority funds including state resources such as the Montana Board of Investments and the Montana Department of Commerce's Big Sky Economic Development Trust Fund Program.

C. Partners

The vision established in the CEDS can only be accomplished through partnerships with a multitude of other organizations. Local governments and non-profits utilize the information in the CEDS to apply for grants and help establish their priorities. State and federal agencies provide funding and assistance for economic development projects. Flathead Valley Community College and local school districts are key partners for workforce training. Chambers of Commerce helped organized focus groups as parts of CEDS process. Local businesses and major employers provide valuable input for the CEDS, mentor new business and represent the economic engine for the county.



Local partnerships include:

- Local governments – Flathead County, City of Kalispell, City of Whitefish, City of Columbia Falls.
- Local Chambers of Commerce – Kalispell Chamber of Commerce, Whitefish Chamber of Commerce, Columbia Falls Chamber of Commerce, Evergreen Chamber of Commerce, Bigfork Chamber of Commerce, Lakeside/Somers Chamber of Commerce
- State Agencies – Governor’s Office of Economic Development, Montana Department of Commerce, Montana Department of Labor & Industry –Job Service Kalispell, Montana Manufacturing Extension Center, Small Business Development Center
- Federal Agencies – Economic Development Administration, United States Department of Agricultural – Rural Development, United States Environmental Protection Agency – Brownfields Program, Small Business Administration, U.S. Department of Transportation
- Education - Flathead Valley Community College, Flathead County Superintendent of Schools, Local school districts, ImagineIF Libraries
- Transportation – Glacier Park International Airport, BNSF Railway, Amtrak, Watco Companies, Montana Department of Transportation
- Non-profits - Kalispell Downtown Association, Service Corps of Retired Executives, Flathead Building Association, Convention and Visitor Bureaus, Community Action Partnership – Northwest Montana, local community foundations and other local non-profits
- Businesses & Major employers – Kalispell Regional Healthcare, Flathead Electric, Weyerhaeuser, TeleTech, SmartLam, financial institutions

SURVEY COMMENTS

“Despite weather, it’s a desirable place to live, work, and raise a family. We have clean air, water, healthy lifestyle, and expanding opportunities in the health care arena. Medical tourism could be a big boon to the area if we promote it.”

“Flathead Valley Community College, the great location, lifestyle, and cost of living can attract tech startup businesses, large corp expansion offices, and aspiring entrepreneurs.”

“The spectacular unspoiled natural environment is a world-class strength for economic development of 21st century businesses.”

“Location and people (workforce). These two components are critical to the attraction and retention of business related economic growth. Tourism is running at full speed and will continue to grow naturally with national economy. Keep focusing on the new and innovative growth of business for the greatest gains.”

D. Past Accomplishments

This document builds on previous CEDS that were completed in 2007 and 2012. Accomplishments resulting from these past planning efforts include:

- **Glacier Rail Park** – FCEDA secured with the City of Kalispell a \$10 million TIGER grant from the U.S. Department of Transportation to implement the Kalispell Core Area and Rail Redevelopment Plan. The grant was awarded in 2015. Work on the industrial park began in 2016. TIGER funding from U.S. Department of Transportation was obligated in 2017.
(www.kalispellcoreandrail.com)



- **Glacier Airline Enhancement and Retention Outreach (Glacier AERO)** – Glacier AERO worked with Glacier Park International Airport (GPIA) to create new and expanded airline travel opportunities at GPIA. Community fundraising efforts to be used as guarantees for new and expanded air service were made possible through Glacier AERO, FCEDA and contributions from private businesses.
- **Gateway West Mall** - In partnership with the City of Kalispell, FCEDA purchased 63,000 square feet of the Gateway West Mall in 2000 and secured a commitment from an inbound call center, Stream, to lease the space. Over the course of its time in the Flathead, Stream and now Teletech have contributed nearly \$70 million in annual payroll for 2,660 employees.
- **Community Economic Information and Business Education** –Flathead Valley Community College and all community and economic development partners comprising the Business Expansion and Retention (BEAR) group have provided extensive economic data and business education to the

community for over a decade. The BEAR partners have strived to adapt to changes in the business environment and provide the resources that the community needs when it needs it.

- **Provided services for business retention, expansion, start-up and relocation.** Montana West Economic Development and BEAR partners provide assistance such as loans, incentives, mentoring, industry intelligence, and procurement technical assistance. Recent success stories include:
 - U.S. Optics
 - Nomad Global Communication Solutions
 - The ZaneRay Group
 - Total Label USA
 - TeleTech
 - SmartLam
 - ViZn Energy Systems
 - Kalispell Creamery
 - Converting Equipment International (CEI)
 - Proof Research
 - Summit Mountain Lodge
 - Ridge Mountain Academy
 - Hurraw Lip Balm



E. Related Planning Efforts

1. Montana West Economic Development Strategic Plan – In 2017, MWED completed a strategic planning process with the following mission and goals.

- **MISSION:** To cultivate growth through the support of new and expanding businesses and of the unique communities that make up Flathead County.
- **Goal 1:** Establish Montana West as the leader in providing business resources to those forming, launching and expanding companies.
- **Goal 2:** Improve and increase regional assets and support the creation of investment opportunities for economic growth in Flathead County.
- **Goal 3:** Maintain a staff and organizational structure that will increase the value of Montana West in the community.

2. Community Planning Documents - Flathead County and incorporated municipalities have adopted growth policies and other planning documents that contain economic development and related strategies. The following documents were consulted as part of the planning process.

- Flathead County Growth Policy

- Kalispell Growth Policy
- Whitefish Growth Policy
- Kalispell Core Area Plan
- Kalispell Downtown Plan (draft)
- Whitefish Housing Needs Assessment

II. County Profile

A. Geography

Flathead County is located in northwest Montana and is 5,087 square miles in size with a population density of 17.9 people per square mile according to the 2010 U.S. Census. Approximately, 76% of land in the county is under public land ownership with the US Forest service accounting for about half of all land in the County. Glacier National Park comprises 19% of land in the county. Flathead Lake is located about seven miles south of Kalispell and is approximately 30 miles long and 16 miles wide. Whitefish Lake, Flathead River, Stillwater River and many other lakes and streams contribute to the mountain scenery with abundant opportunities for outdoor and water sports.



Figure 1
Flathead County

The City of Kalispell is the county seat and largest city in the county. Other incorporated municipalities include the City of Whitefish located 11 miles north of Kalispell and the City of Columbia Falls located seven miles east of Whitefish. Unincorporated towns include Evergreen, Bigfork, Lakeside, Somers, Marion, Kila, Hungry Horse, Coram, and Olney. Spokane and Calgary are the nearest major metropolitan areas.

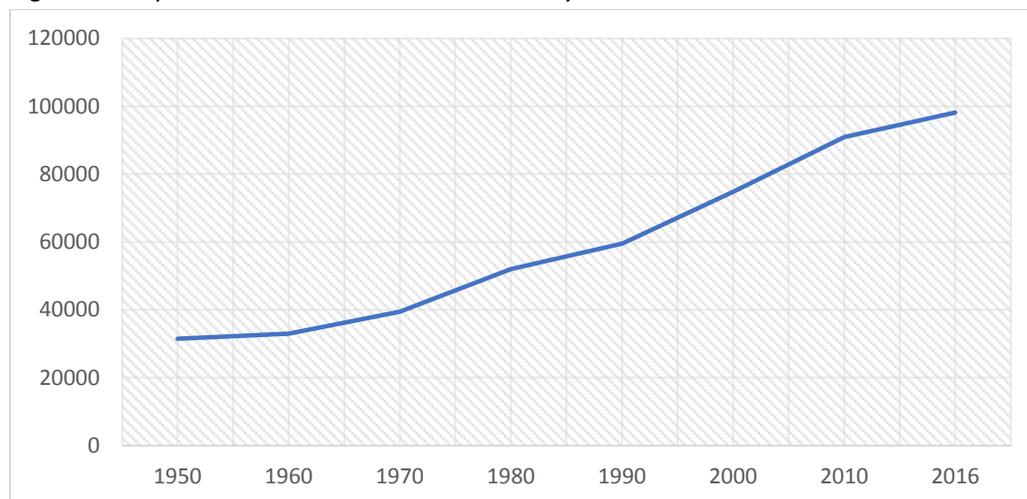
Table 1: Distance from Major Cities

Attraction	Mileage (from Kalispell)
Missoula	121 miles
Helena	194 miles
Spokane	237 miles
Seattle	515 miles
Calgary	262 mile

B. Population

Flathead County has experienced steady population growth over the last 50 years. Since the 2010 Census, it is estimated that the Flathead County has one of the highest growth rates in the state. According to projections from the Montana Department of Commerce – Census Economic Information Center (CEIC), the population of Flathead County is expected to exceed 100,000 by the next census in 2020 and should continue to grow reaching a population of 114,980 by the year 2035.

Figure 2: Population Growth in Flathead County



1950	1960	1970	1980	1990	2000	2010	2016
31,495	32,965	39,460	51,966	59,545	74,774	90,928	98,082

Source: U.S. Census <http://ceic.mt.gov/Population/PopulationProjections.aspx>

Kalispell is the county seat and largest of the three municipalities in Flathead County. While the majority (66%) of the population resides in the unincorporated areas, most of the recent population growth is occurring in the three cities. The average age in the county is 42.1 years compared to 39.7 years statewide.

Table 2: Population Trends & Projections

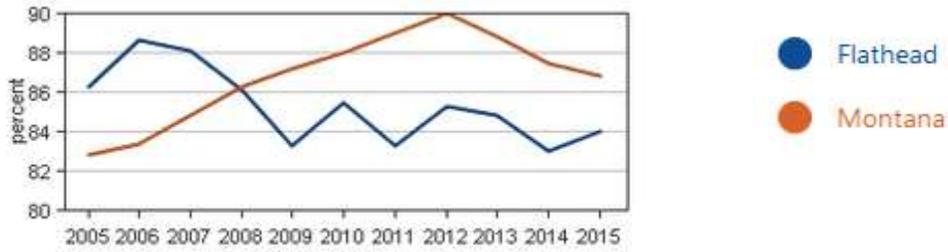
	2010 Census	2016 Estimate	# Change 2010-2016	% Change 2010-2016	Projected 2022
Flathead County	90,928	98,082	7154	7.9%	106,784
Kalispell	19,927	22,761	2834	14.2%	22,803
Whitefish	6,357	7,279	922	14.5%	7,507
Columbia Falls	4,688	5,241	553	11.8%	5,680
Rest of County	59,956	62,801	2845	4.7%	70,794
Montana	989,415	1,042,520	53105	5.4%	1,112,522

Source: U.S. Bureau of the Census, Montana Governor's Office of Economic Development, Montana Site Selector Community Profiles (ESRI), Montana Census and Economic Information Center

C. Income

In 2015, Flathead had a per capita personal income (PCPI) of \$40,407. This PCPI ranked 32nd in the state and was 97 percent of the state average, \$41,809, and 84 percent of the national average, \$48,112. The 2015 PCPI reflected an increase of 4.8 percent from 2014. The 2014-2015 state change was 3.0 percent and the national change was 3.7 percent. Since the recession of 2008, the PCPI in Flathead County has lagged behind the state. In 2015, the gap between the county and state narrowed.

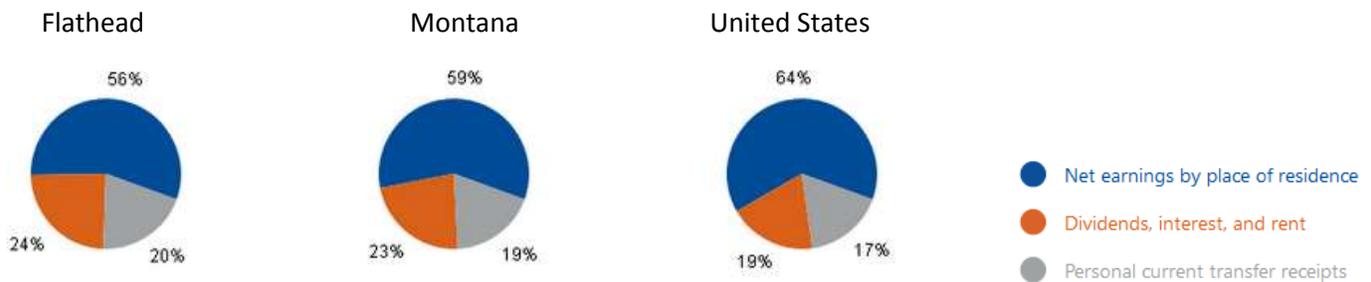
Figure 3: Per Capita Income as a Percent of the United States



Source: www.bea.gov/regional/bearfacts/action.cfm

Total personal income includes net earnings by place of residence; dividends, interest, rent collections; and personal current transfer receipts. In 2015, Flathead had a personal income of \$3,885,742 (Personal income estimates are in thousands of dollars, not adjusted for inflation). This personal income ranked 4th in the state and accounted for 9.0 percent of the state total. Compared to the rest of the nation, dividends and transfer payments (i.e. social security) comprise a larger share of personal income for the Flathead County and Montana. This is due to the larger number of retirees in the region.

Figure 4: Personal Income by Type - 2015



Source: U.S. Bureau of Economic Analysis

www.bea.gov/regional/bearfacts

D. Poverty

The poverty threshold is based on the: number of people, number of related children under 18, and whether or not the primary householder is over age 65. Family income is then compared to the poverty threshold; if that family's income is below the threshold, the family is classified as being in poverty.

Each year the U.S. Census Bureau establishes thresholds to measure the number of people living below a certain income level. The numbers are used to formulate economic policy and distribute social service aid. The poverty threshold in 2016 for a single individual was \$11,880 and for a family with 2 adults and 2 children it was \$24,300.

According to the U.S. Census, 13.3% of the Flathead County population has incomes below poverty levels and 18.2% of children below the age of 18 live in poverty. Children under age 18 are more likely to be living in poverty than any other group. Compared to the State of Montana, poverty levels are lower in Flathead County. Note that median household income in the county is slightly higher than the State average.

Table 3: Poverty Levels in Flathead County

<i>% in Poverty</i>	<i>Flathead County</i>	<i>Montana</i>
All ages in Poverty	13.3%	15.2%
Under age 18 in Poverty	18.2%	19.6%
Ages 65 years and over	7.6%	8.3%
Median Household Income	\$47,851	\$47,169

Source: U.S. Census Bureau, American Community Survey 2011 – 2015

E. Labor Force

The unemployment rate in Flathead County is slightly higher than the statewide average but is significantly lower than five years ago in 2012 when the rate was 9.0%. The county has a slightly higher high school graduation rate than the rest of the state.

Table 4: Selected Labor Statistics – Flathead County & Montana

	<i>Flathead County</i>	<i>Montana</i>
<i>Total Labor Force (June, 2017)</i>	47,404	524,987
<i>Total Unemployed (June, 2017)</i>	2,141	20,246
<i>Unemployment Rate (June, 2017)</i>	4.5%	3.9%
<i>% of Population over 25 = High School Graduate</i>	94.35	92.8%
<i>% of Population over 25 = Bachelor's Degree or more</i>	29.1%	29.5%

Source: U.S. Census Bureau, American Community Survey 2011 – 2015, Montana Dept. of Labor & Industry

F. Employment and Wages by Industry

In Flathead County, retail, health care and accommodation/food services account for the largest share of private sector jobs. These are also sectors that have the strongest job growth since 2012. Construction, manufacturing and administration services also showed strong employment growth during this time period. Recent closures by Weyerhaeuser (previously Plum Creek) may negatively impact employment in the manufacturing sector.

Figure 5: Private sector Employment by Industry – 2012 & 2015

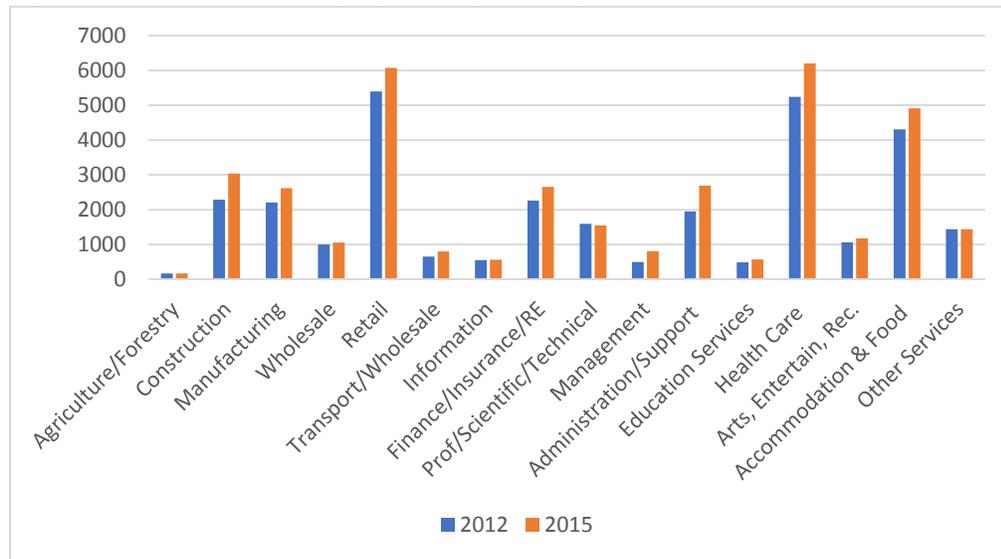


Table 5: Change in Employment Growth by Industry Sector 2012-2015

	2015 Establishments	2015 Employment	2012 Employment	# Change	% Change
Agriculture/Forestry	52	169	163	6	3.7%
Construction	689	3039	2292	747	32.6%
Manufacturing	182	2620	2208	412	18.7%
Wholesale	116	1056	997	59	5.9%
Retail	477	6071	5396	675	12.5%
Transportation/Wholesale	142	801	650	151	23.2%
Information	56	560	547	13	2.4%
Finance/Insurance/Real Estate	431	2650	2263	387	17.1%
Professional/Scientific/Technical	416	1547	1592	-45	-2.8%
Management	16	812	499	313	62.7%
Administration/Support Waste Mgt.	208	2692	1954	738	37.8%
Education Services	35	571	483	88	18.2%
Health Care	352	6200	5246	954	18.2%
Arts, Entertainment, Recreation	118	1172	1068	104	9.7%
Accommodation & Food Services	369	4910	4306	604	14.0%

Source: U.S Census, County Business Patterns 2012 & 2015

G. Location Quotients & Wages

Location quotients (LQ) compare the concentration of an industry within a specific area compared to the concentration of that industry nationwide. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case nationwide. According to this measurement, there is a high concentration of jobs in the construction and leisure/hospitality industry while there is a lower than national average in the information and professional/businesses services sector.

Table 6: Private Sector Employment– Flathead County – 2016 (Q4)

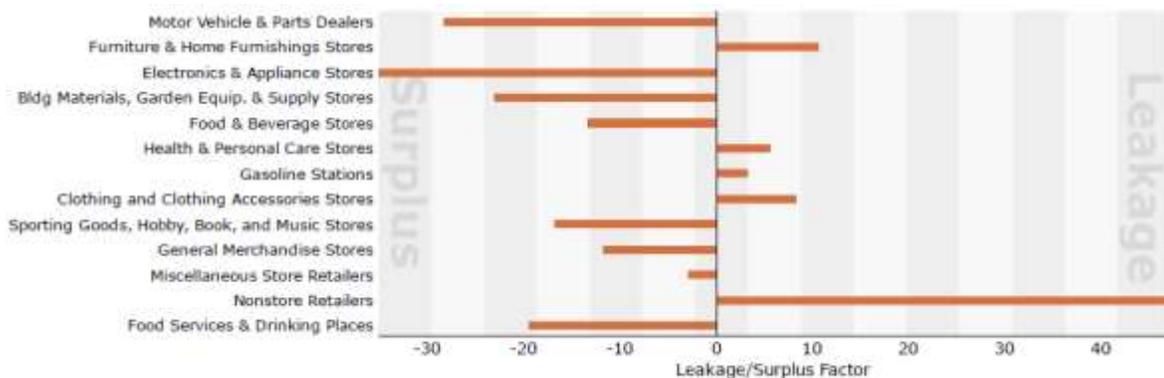
Industry	Location Quotient	Avg. Weekly Wage
Construction	1.44	\$940
Education/Health Services	1.17	\$1,069
Financial Activities	1.06	\$1,152
Information	0.41	\$1,013
Leisure and Hospitality	1.56	\$350
Manufacturing	0.75	\$996
Natural Resources/Mining	1.05	\$988
Other Services	1.15	\$543
Professional/Businesses Services	0.63	\$928
Services-Providing	1.04	\$769
Trade, Transportation, Utilities	1.0	\$685

Source: United States Bureau of Labor Statistics, www.bls.gov

H. Retail Sales Trends

Supply (retail sales) estimates sales to consumers by establishments. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. The Leakage/Surplus Factor is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area.

Figure 6: Leakage/Surplus Factor Industry Subsector - 2017

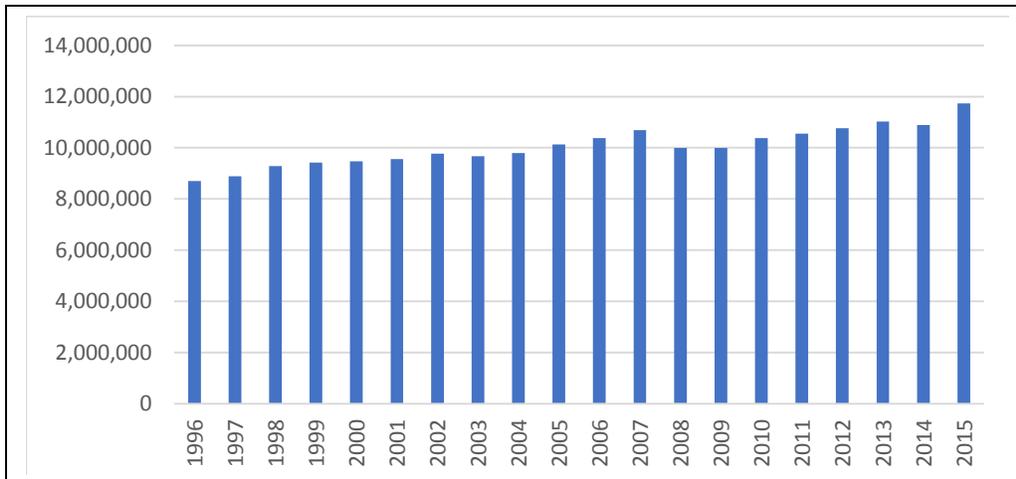


Source: Montana Governor's Office of Economic Development - ESRI and Info Group Site Selector Data

I. Tourism

According to data from the University of Montana Institute for Tourism and Recreation Research (ITTR) visitation in Flathead County has increased an average of 1.7% per year over the last 20 years.

Figure 7: Visitation Flathead County



Source: University of Montana Institute for Tourism and Recreation Research

Corresponding to growth in visitation, lodging tax revenues collected in Flathead County have been rising as well. Increase in lodging revenues may be due to higher occupancy rates, increase in lodging rates, and an increase in the inventory of lodging rooms. Inventory may include short-term rentals through companies such as AirBNB and VRBO. Revenues collected from the 4% lodging facility use tax are deposited to a state special revenue fund and is used by the Department of Commerce, regional tourism offices, and convention and visitor bureaus for tourism promotion and promotion of the state as a location for the production of motion pictures and television commercials. Revenues collected from the 3% lodging facility sales tax are deposited to the General Fund.

Figure 8: Lodging Tax Revenue Collections – Flathead County



Source: MT Dept. of Commerce Montana Promotion Division,
<http://marketmt.com/Resources/LodgingFacilityUseTax>

J. Housing

A housing unit is vacant if no one is living in it at the time of enumeration. According to U.S. Census Data, Flathead County has a high vacancy rate, but the majority of these vacancies are in Whitefish and in the unincorporated areas and is due to the large number of seasonal and recreational homes. In the cities of Kalispell and Columbia Falls, the vacancy rate is around 8% and is more indicative of a normal real estate market. The inventory of vacant homes available for new homeowners countywide is slightly higher than the statewide average of 2.1% but is significantly lower in Whitefish – indicating limited opportunities for homebuyers in the city. Kalispell, however, is experiencing a shortage in the rental market with a rental vacancy rate of 3.7% - significantly lower than the 6.2% statewide average for rental units.

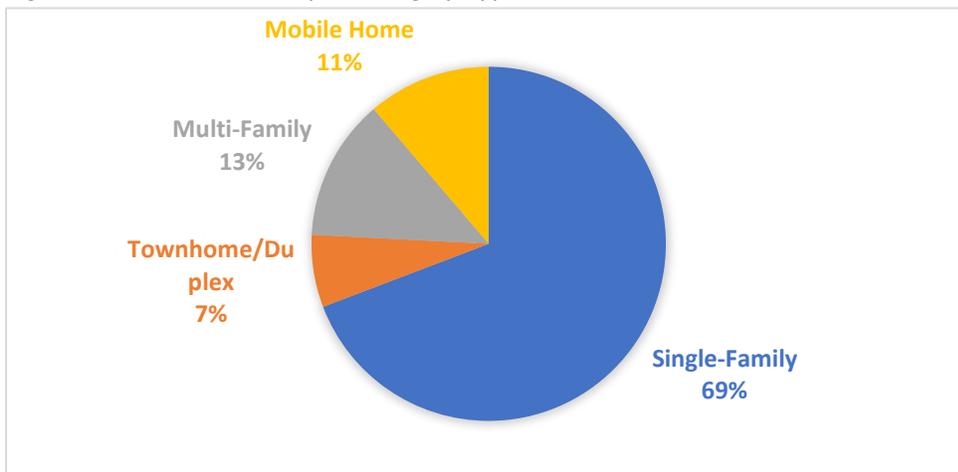
Table 7: Flathead County – Housing County and Occupancy Statistics

	Flathead County	Kalispell	Whitefish	Columbia Falls
Total # Housing Units	47,283	9,406	4,389	2,125
Occupied	37,106	8,608	3,032	1,949
Vacant Units	10,177	798	1,357	176
Vacancy Rate	21.5%	8.5%	30.9%	8.3%
Seasonal Units	7,086	271	1,010	0 to 14 units
% of Vacant Units that are Seasonal	70%	34%	74%	< 1%
Homeowner Vacancy Rate	3.4%	3.2%	1.2%	9.3%
Rental Vacancy Rate	8.0%	3.7%	9.9%	6.5%

Source: U.S. Census, American Community Survey, 2011 - 2015

As indicated below, 70% of the housing inventory is in single-family homes. This is comparable the statewide average.

Figure 9: Flathead County Housing by Type



Source: U.S. Census, American Community Survey 2011-2016

Median home value in Flathead County is higher than the state average of \$193,500. Whitefish has the highest median home cost of the incorporated municipalities in the County. Additionally, average rental costs in the County are \$788 a month and are higher than the state average of \$711. According, to the Whitefish housing needs assessment that was completed in 2016, average rents vary from \$775 for a one-bedroom to up to \$1,275 for a two bedroom.

The U.S. Department of Housing and Urban Development (HUD) defines a cost burden as housing costs that consume more than 30% of household income. Housing costs include monthly payments for rent or mortgage and utilities. According to this definition, almost half of renters throughout the county are experiencing a cost burden. Although homes in Whitefish exceed the county median value, households in Whitefish also have higher incomes and therefore homeowners are less likely to experience a cost burden compared to other parts of the county.

Table 8: Flathead County Housing Cost

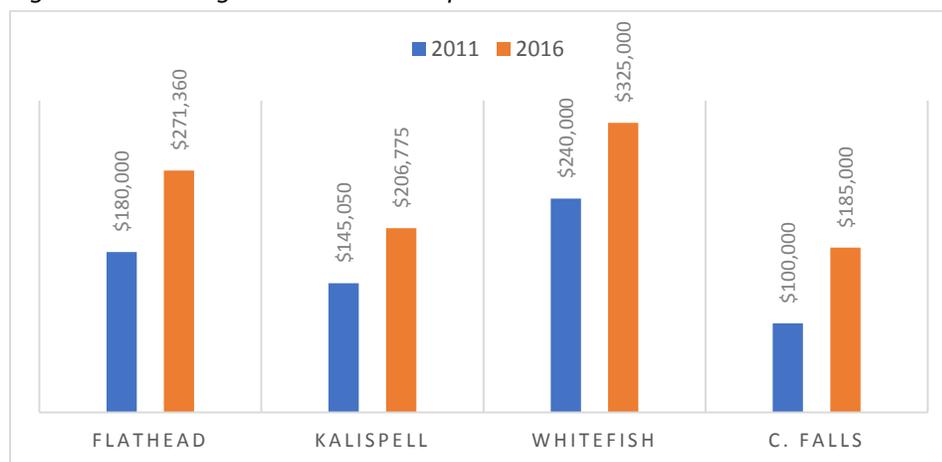
	Flathead County	Kalispell	Whitefish	Columbia Falls
Median Home Value	\$231,500	\$186,700	\$275,200	\$168,300
Median Rental Cost	\$788	\$766	*	*
% Homeowners with Housing Cost > 30%	42%	38.3%	28%	41.2%
% Renters with Housing Cost > 30%	49.7%	52.2%	47.5%	44.8%

Source: U.S. Census, American Community Survey 2011-2015

Note: Survey size for rental units for Whitefish and Columbia Falls was too small to have reliable information on rental cost.

Average sales price of homes on the market tend to be higher than the median value because new construction that is listed for sales represents a larger portion of the sample size and is generally more expensive than existing older homes. The table below indicates the dramatic increase in average sale prices over the last five years which is indicative of the affordable housing issue.

Figure 10: Average Sales Prices Comparison



Source: Kelly Appraisal, <http://kelleyappraisal.net/FlatheadMarket16.pdf>

K. Transportation

1. Road Network

The road network includes two major U.S. Highways. U.S. Highway 93 is a north-south highway that extends from the Canadian border and is the main route to Missoula. U.S. Highway 2 crosses the County from east-west and is the southern border of Glacier National Park. The county road system includes 430 miles of paved roads and nearly 700 miles of graveled roads. The table below indicates the road segments with the heaviest traffic volumes. The most heavily travelled road segment in the county is US 93 in Kalispell from North Meridian Road to West Reserve Drive.

Table 9: Average Daily Traffic for Selected Road Segments - 2016

	AADT
US Hwy 93 from Meridian to Reserve (Kalispell)	30,361 - 44,924
US Hwy 93 from Idaho to North Meridian (Kalispell)	21,563 – 30,361
US Hwy 93 from Hwy 40 to 19 th Street (Whitefish)	21,563 – 30,361
US Hwy 2 (Idaho) from Hwy 35 to US Hwy 93 (Main St.) (Kalispell)	21,563 – 30,361
US Hwy 2 from Hwy 35 to Glacier International Airport (Kalispell)	21,563 – 30,361
US Hwy 2 from Hwy 40 to Nucleus Ave. (Columbia Falls)	21,563 – 30,361
US Hwy 93 from Cemetery Rd to Hwy 82 (Kalispell)	15,594 – 21,563
US Hwy 93 from Reserve Street (Kalispell) to Hwy 40 (Whitefish)	15,594 – 21,563
US Hwy 93 from Idaho to Kelly Rd. (Kalispell City Airport)	15,594 – 21,563
US Hwy 93 from 19 th Street to 2 nd Street (Whitefish)	15,594 – 21,563
US Hwy 2 from Idaho to US 93 Bypass (Kalispell)	15,594 – 21,563
Reserve Drive from US Hwy 93 to Whitefish Stage Rd. (Kalispell)	15,594 – 21,563

Source: Montana Department of Transportation

2. Airports

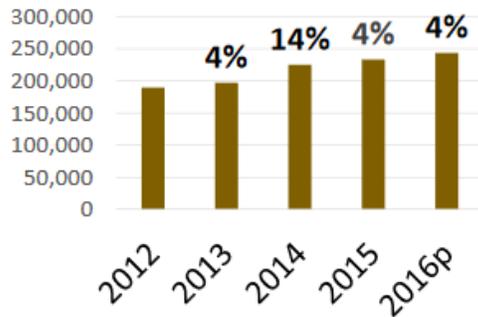
Glacier Park International Airport provides commercial passenger service and direct flights to the following locations.

Figure 11: Kalispell Airport Direct Flights

GPIAA Airlines	Direct Flights
Allegiant	-Las Vegas, NV -Oakland, CA
Delta / Skywest	-Atlanta, GA (seasonal) -Minneapolis, MN -Salt Lake City, UT
Alaska Airlines	-Seattle, WA -Portland, OR
United	-Chicago, IL (seasonal) -Denver, CO -San Francisco, CA (seasonal)

Glacier Airline Enhancement and Retention Outreach (Glacier AERO) works with Glacier Park International Airport to increase airline travel opportunities at GPIA. These efforts have contributed to an

Figure 12: Kalispell Airport Deboardings



Source: www.bber.umt.edu/pubs/seminars/2017/Tourism.pdf

increase in deboardings over the last five years. Several other general aviation airports exist in Flathead County. These airports are intended primarily for general and recreational use and have no scheduled carriers. General aviation airports are located in Kalispell, Whitefish and Ferndale. The Kalispell City Airport provides charter services and is managed by the City. Whitefish Municipal Airport and Ferndale Airport are managed by Glacier Park International Airport (GPIAA). Glacier

3. Rail

The main northern route of the BNSF Railway Company crosses Flathead County with a major facility located in Whitefish. The Amtrak “Empire Builder” provides passenger service and stops in Whitefish. Mission Mountain Railroad also provides freight service in the county. Mission Mountain Railroad and BNSF Railway are partners in the Glacier Rail Park being constructed in Kalispell.

4. Transit

a) Eagle Transit (<https://flathead.mt.gov/eagle/>)

Eagle Transit provides general public and paratransit services within Flathead County. All vehicles are ADA accessible and equipped with lifts. Services are not provided on weekends or holidays.

Services include:

- City bus service in Kalispell, Whitefish and Columbia Falls
- City to city commuter service
 - Kalispell to Whitefish and return
 - Kalispell to Columbia Falls and return
- SPARKS after school route to The Summit
- Elementary school pick-ups during school year
- Paratransit Dial-A-Ride - Door-to-door, appointment based, shared ride service for people with disabilities or other conditions that make it difficult to use fixed route city bus service

- b) Big Mountain Commercial Association (<http://bigmtncommercial.org/>)

The Big Mountain Commercial Association is a non-profit association that raises funds to pay for the Snow Bus and the Glacier Park Express. The Snow Bus operates from December to April and provides free transit service from locations in Whitefish to Whitefish Mountain Resort.

The Glacier Park Express operates in the summer months and provides transit service between Whitefish Mountain Resort, Whitefish and Glacier National Park (Apgar Village). Service is free between Whitefish and Whitefish Mountain Resort. There is a fee of \$10 for round-trip service to Glacier National Park. The summer buses are equipped with bike racks.

5. Trails

Flathead County has an extensive network of bicycle and pedestrian trails that are maintained by multiple jurisdictions and non-profit groups. Various planning documents express a goal of expanding and connecting the trail networks between cities. Information on trails and trail plans in the county can be found at the various web sites.

- Flathead County Trails Plan
https://flathead.mt.gov/parks_rec/documents/FlatheadCountyTrailsPlanraft9-1-09.pdf
- Kalispell Park & Recreation Master Plan
http://www.kalispell.com/parks_and_recreation/downloads/masterplan.pdf
- Kalispell Core Area Plan
http://www.kalispell.com/community_economic_development/documents/LowResolutionVersion.pdf
- Foys to Blacktrail Trail – <http://www.foystoblacktailtrails.org/>
- City of Whitefish, “Connect Whitefish: Bicycle and Pedestrian Master Plan”
<http://www.cityofwhitefish.org/planning-and-building/long-range-plans.php>
- Whitefish Legacy Partners - <https://www.whitefishlegacy.org/>

L. Infrastructure & Utilities

1. Water & Sewer

- **Municipal Water & Wastewater Systems** - The incorporated cities of Kalispell, Whitefish and Columbia Falls all operate their own water and wastewater systems. New development must annex to the municipality in order to connect to these systems.
- **Water and Sewer Districts**- The largest water and sewer districts serve the communities of Bigfork, Coram, Evergreen, Hungry Horse, Lakeside, Martin City and Somers each serve between 500 and 8,000 residents and businesses. The Coram, Hungry Horse and Martin City Districts offer public water services only. No public sewer treatment is available. The Bigfork

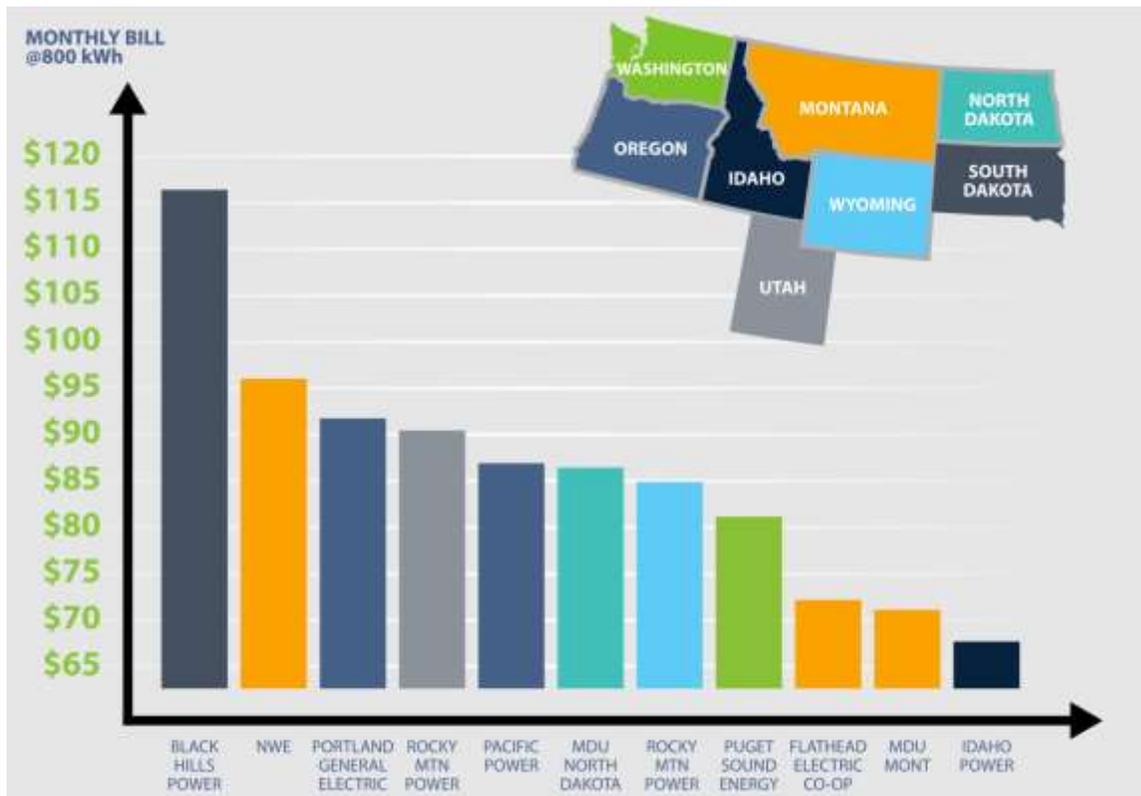
and Lakeside Districts operate their own sewer treatment facilities, while Somers contracts with Lakeside for sewer treatment. Evergreen contracts with the City of Kalispell for sewer treatment services. In addition to the major districts described above, there are other small water and/or sewer districts that have been established to serve larger scale development and subdivisions. The County Clerk office maintains a list of districts and their boards. https://flathead.mt.gov/election/our_boards.php

- Areas that are not served by a water or sewer district rely on individual wells and septic systems.

2. Electric & Gas

- NorthWestern Energy provides natural gas to the incorporated cities. <http://www.northwesternenergy.com/>
- Flathead Electric Cooperative provides the electric power to the core of Flathead County. Flathead Electric Cooperative has some of the lowest rates in the region. <https://www.flatheadelectric.com/>

Figure 13: Electrical Rates



Source: <https://www.flatheadelectric.com/account/rates-service-fees/>

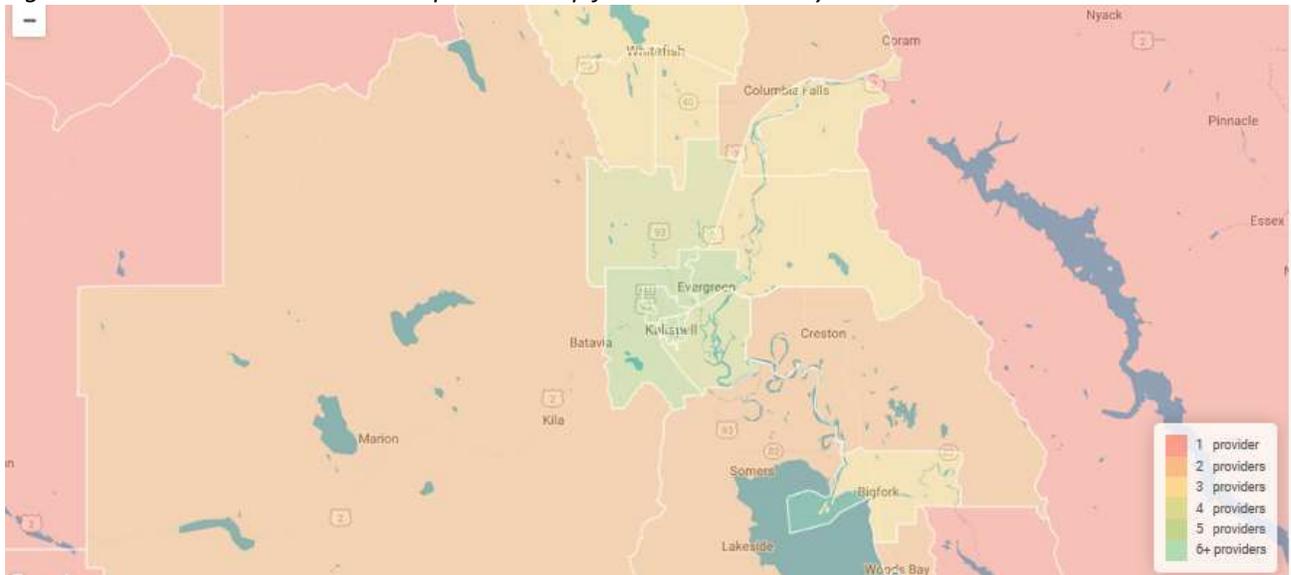
3. Broadband

The following companies are the primary Internet broadband providers in the County. Since companies are continuously upgrading their networks, it is important to check websites for current service offerings.

- Century Link – DSL & Fiber
- Spectrum – Cable
- Bullitt – Fixed Wireless
- Montana Sky Networks – DSL/Fiber/Wireless
- Verizon – 4g Wireless
- Blackfoot Communications – DSL/Fiber

In 2015, the FCC adopted a new standard for broadband of 25mbps download speed. The FCC Broadband Plan calls for 100 mbps download speeds for homes and one gigabit speeds for anchor institutions by the year 2020. Most providers in the County do not meet this standard. The website, www.findbroadband.com, rates broadband service in Flathead County as “Fair”. This rating is based on average number of business broadband providers when compared to other cities nationally. As noted on the map, rural areas of the county have fewer options for Internet.

Figure 14: Business Broadband Competition Map for Flathead County



Source: www.findbroadband.com

M. Local Services

1. Education

- **Flathead Schools** - Flathead County communities support twenty-three independent school districts. The nineteen elementary districts have a cumulative enrollment of approximately 9,426 students. The four high school districts - Bigfork, Columbia Falls, Kalispell, Whitefish - enroll approximately 4,257 students. Public high schools provide Advance Placement and International Baccalaureate classes. The high schools work in conjunction with Flathead Valley Community College to provide increased local opportunities to students. The elementary districts partner with their respective high school districts to assure "readiness" in transitions. The Flathead County Superintendent of Schools maintains a list of districts. <https://flathead.mt.gov/schools/districts.php>

- **Flathead Valley Community College** - Flathead Valley Community College has two campuses located in Kalispell and Libby.

Established in 1967, Flathead Valley Community College is regularly recognized as one of the most innovative community colleges in the Rocky Mountain West. FVCC was one of three institutions to receive the 2015 Community College Bellwether Award, one of the highest honors for U.S. community colleges.

FVCC offers high-quality academic programs taught by world-class faculty. Students can begin their academic careers at FVCC with two-year programs that transfer to four-year colleges and universities or take advantage of more than 50 career and technical programs that prepare them to enter the workforce upon degree completion. In partnership with four-year higher education institutions, FVCC is expanding options for students to earn bachelor's degrees without having to leave the Flathead Valley.

The first dormitories on campus were completed in August 2017, housing up to 124 students.

FVCC remains one of the most affordable colleges in the nation. Local high school students ages 16 and older are eligible to earn up to six college credits at FVCC tuition-free through the Running Start program.

In addition to certificate and degree programs, FVCC offers workforce training and lifelong learning opportunities for the community through the FVCC Continuing Education Center.

- **ImagineIF Libraries** –
 - Preschool early literacy classes
 - Informal, self-directed learning opportunities
 - Hands-on, interactive learning for all ages
 - Free wireless Internet access, computer learning
 - Books, DVDs, eBooks and audio for recreational and educational use

2. Health Care

- Flathead County Public Health - Flathead County provides medical and dental services through the Flathead Community Health Center. <http://flatheadhealth.org/>
- Kalispell Regional - Kalispell Regional Healthcare (KRH) is a 300-bed healthcare system located in Kalispell, Montana. Comprising the health care system are two acute-care hospitals and a mental health and substance abuse facility. Core services include cancer care, cardiovascular care, neuroscience and spine care, trauma level III emergency services, neonatal intensive care, medical/surgical/pediatric unit and orthopedics. <https://www.krh.org/>
- North Valley Hospital - North Valley Hospital (NVH) is a 25 bed Critical Access Hospital based in Whitefish, Montana and is a public benefit non-profit corporation. Core services include 24/7 emergency, Birth Center, orthopedics and minimally invasive surgery. NVH operates primary and specialty care clinics in Whitefish, Columbia Falls, Kalispell and Eureka, Montana, in addition to a structured outpatient mental health service in Whitefish. <https://www.krh.org/nvh/>

N. Superfund – Brownfield

1. Superfund

EPA's Superfund program is responsible for cleaning up some of the nation's most contaminated land and responding to environmental emergencies, oil spills and natural disasters. To protect public health and the environment, the Superfund program focuses on making a visible and lasting difference in communities, ensuring that people can live and work in healthy, vibrant places.

On September 7, 2016, the EPA announced that it will add the Columbia Falls Aluminum Company (CFAC) site to the National Priority Listing, effective September 9, 2016. CFAC permanently closed in March, 2015.

Sites on the NPL are often referred to as Superfund sites. Superfund is the federal program that investigates and cleans up contamination at sites that pose a risk to human health and the environment.

<http://deq.mt.gov/DEQAdmin/cfac>

<https://cumulis.epa.gov/supercpad/cursites/csinfo.cfm?id=0800392>

2. Montana Department of Environmental Quality

The Environmental Protection Agency (EPA) defines Brownfields as real property, the expansion, redevelopment, or reuse of which may be complicated by the presence or potential presence of a hazardous substance, pollutant, or contaminant. DEQ addresses blighted or underutilized Brownfields properties throughout Montana by:

- Promoting the redevelopment of Brownfields sites throughout Montana.
- Serving as a resource for local communities, non-profits, and economic development authorities.
- Making petroleum Brownfields eligibility determinations, as delegated by the EPA. DEQ has developed their guidance document and eligibility form to maximize the number of Brownfields eligible sites in Montana, while ensuring that the federal Brownfields requirements are met.
- Ensuring that state cleanup standards are achieved to protect human health and the environment when federal Brownfields funds are spent on cleanup.

<http://deq.mt.gov/Land/Brownfields>

3. Kalispell Brownfields

The Kalispell Brownfield Program is voluntary. Public or private property owners can use grant funds to address regulatory agency requirements, complete the sale of their property, or to learn more about their property should they consider selling it. The assessments are completed at no cost to the property owner, and information on the presence/absence of contamination is provided to the owner upon completion of the work. In addition, any site assessed by the City is potentially eligible for cleanup grant funds from EPA which the City may apply for in coming years.

http://www.kalispell.com/community_economic_development/brownfield_program.php

III. Public Input

A. Overview of Process

In April and May of 2017, Montana West conducted six community focus group discussions throughout the County. Over 100 people combined participated in the meetings. The meetings were held at the following locations.

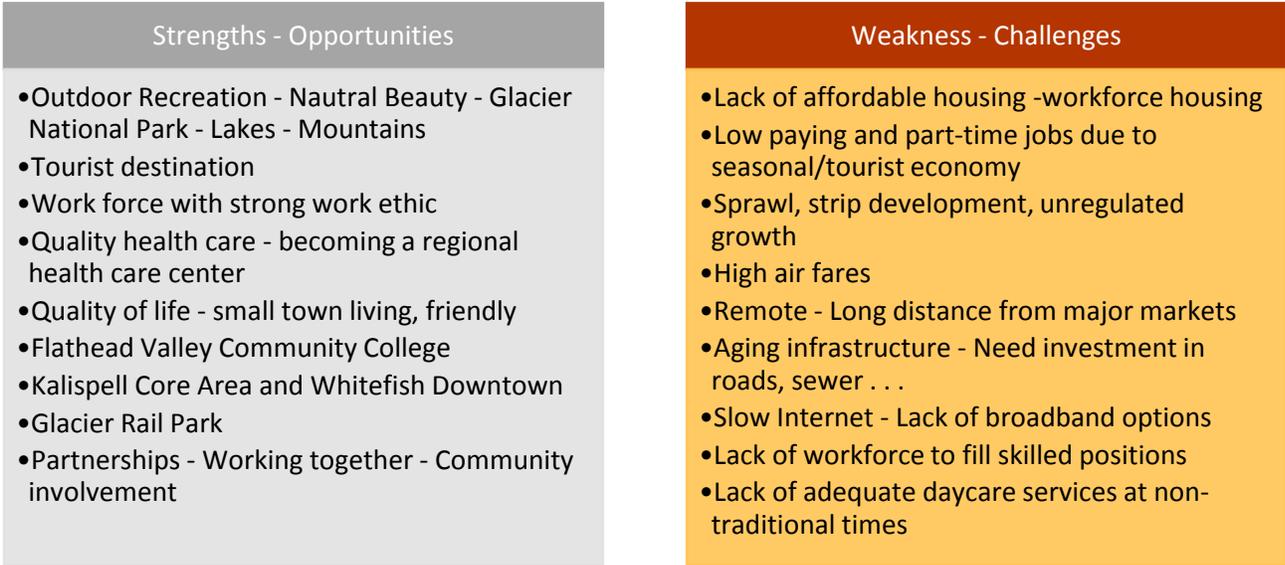
- Bigfork
- Columbia Falls
- Evergreen
- Kalispell
- Lakeside
- Whitefish

In addition to the focus group, MWED conducted an on-line survey to obtain more widespread input from the community. The survey link was sent to e-mail lists by MWED, the City of Whitefish and several Chambers of Commerce in the county. The link to the on-line survey was on the MWED and FCEDA web sites and a press release and media coverage directed community members to these web sites to take the survey. A total of 142 people responded to the survey (See appendix for results.)

B. Challenges and Opportunities

Based on survey responses, focus group participation and the growth policy review, the following strengths and weaknesses were identified for the entire county.

Figure 15: County Strengths and Weaknesses



C. Community Specific Feedback

While the section above identifies trends that apply countywide, there were some issues that were specific to each of the communities that hosted focus groups. These issues and opportunities suggest that each community may want to adopt specific strategies to address these topics.

Table 10: Community Specific Feedback

Community	Opportunities/Issues
Kalispell	<ul style="list-style-type: none"> • Regional retail center & regional health center • Brownfields • Investigate feasibility for performing arts center, convention center and indoor sports facility. • Shortage of rental units • Accessible daycare with traditional and non-traditional schedules • Expand shoulder season visitation to boost the year-round economy.
Whitefish	<ul style="list-style-type: none"> • Increase shoulder season tourism visitation and expenditures to continue building a robust year-round economy. • Attracting more retirees but not enough young entrepreneurs. • Housing needs assessment underway to address workforce housing issues. • Need to coordinate on land use issues with County. • Lack of land zoned for industrial use to attract businesses
Columbia Falls	<ul style="list-style-type: none"> • Bedroom community to Whitefish and Kalispell but are attracting new businesses. • CFAC/Plum Creek potential sites for redevelopment – target clean industries • Need industrial park in Columbia Falls with rail access – Columbia Rising. • Housing more affordable in Columbia Falls than other parts of the county
Bigfork	<ul style="list-style-type: none"> • Strong non-profit & philanthropy in the community with projects mainly funded by the Chamber of Commerce, Foundation for a Better Bigfork and the Bigfork Promotion Group. • Seasonal economy is a challenge for businesses. • Community is an unincorporated area and that makes it hard to manage growth and fund infrastructure needs. • Need for new community center that would house library, senior center, after school program. • Need a lake-front park to provide more lake access in the Bigfork area.
Evergreen	<ul style="list-style-type: none"> • Community is an unincorporated area; hard to manage certain issues. • Crime is an issue. Would like satellite sheriff office. • Poor community image - need beautification projects. • Need for transportation improvements. • Chamber of Commerce has been successful with projects.
Lakeside/Somers	<ul style="list-style-type: none"> • Active volunteers and community groups • Investigating feasibility for performing arts center • Improvements needed to marina. • Infrastructure needs - parking, sidewalks, stormwater, water-sewer district.

IV. Goals – Strategic Framework

A. Overview

Goals and strategies are the heart of the regional plan. Goals and strategies are crafted to address the challenges and opportunities identified through the public process and data analysis. Goals and strategies provide the basis for action items and also offer benchmarks by which to evaluate the success of the plan.

- A goal is the most general statement. It sets the framework for strategies and implementation.
- The strategies outline steps for achieving the goal, and can be applied to a variety of geographies and organizations.
- Implementation action items typically specify timeframes; specify where the strategy applies; designate who will lead the effort and establish benchmarks.



Collectively, the goals and objectives describe a shared vision for the County and ensure an integrated, innovative approach to the proposed economic development strategy. Achieving these goals in the next five years will require a substantial and coordinated effort. To ensure the greatest level of success possible, MWED and FCEDA will work with partners and stakeholders across the region to implement this plan.

Goal 1: Enhance and expand workforce development and educational opportunities for residents in order to provide a skilled workforce for local businesses and increase regional competitiveness.

Objectives:

- 1.1 Work with businesses, Flathead Valley Community College, ImagineIF Libraries, school districts, high schools and vocational programs to identify workforce needs and programs for a trained workforce to match the needs of local industries as well as Science, Technology, Engineering and Math (STEM) fields.
- 1.2 Expand opportunities for students to engage in learning with local business through events, internships, mentoring and apprenticeship programs.
- 1.3 Provide necessary resources and practical support to increase the rate of attainment of high school and college graduation among the local workforce.
- 1.4 Assist employers to access finances and resources to develop their existing workforce and enhance attraction and retention of the work force.
- 1.5 Support efforts to expand offering of four-year college degree programs in the county.

Goal 2: Expand and diversify the economic base to create higher paying jobs through efforts to promote business start-ups and attract new business to the region.

Objectives

- 2.1 Provide access to non-traditional capital to supplement lending and investor activity.
- 2.2 Invest in existing and new local industrial sites to attract 21st Century businesses that create well-paid jobs and increase and diversify the tax base.
- 2.3 Identify and provide services and education for local entrepreneurs and business owners such as mentoring, business counseling, networking, technical assistance, tax incentives and financing options.
- 2.4 Target industry clusters such as high tech, green tech, and small manufacturing that can meet market niches and thrive by building on relationships with other similar businesses.
- 2.5 Promote Flathead County as a place for innovators and entrepreneurs.
- 2.6 Promote local agriculture and value-added agriculture activities that create new jobs and investment in Flathead County.
- 2.7 Support the growth of the internet-based home business as well as telecommuter jobs.

Goal 3: Support the maintenance and enhancement of the physical infrastructure that is needed for sustainable economic growth in Flathead County.

Objectives

- 3.1 Support improvements in road quality and rail and air transportation access to lower cost of travel and transport of goods.
- 3.2 Support improvements to water and sewer infrastructure.
- 3.3 Support improvements and availability of affordable and reliable high-speed broadband to enhance education, public safety, health care, business and government services.
- 3.4 Support investments in the local energy supply through conservation, efficiency and alternative energy projects to reduce energy costs and to create new jobs.
- 3.5 Identify existing and new funding opportunities to leverage local dollars for completion of critical infrastructure projects.

Goal 4: Build on the region's strengths and assets to support, retain and grow existing businesses.

Objectives

- 4.1 Increase and efficiently administer existing resources to support existing and new businesses.
- 4.2 Promote the area as a destination for year-round leisure travel, meeting and convention opportunities.
- 4.3 Support the expansion of the health care sector to continue its growth as a regional supplier of health care services to northwest Montana and Canada.
- 4.4 Provide training and business assistance for business retention and to support business expansion.
- 4.5 Encourage the clean-up and redevelopment of brownfield sites to create new job opportunities.

Goal 5: Develop and maintain a positive quality of life for citizens and visitors to ensure communities are appealing and healthy places to live, work and recreate and to conduct business.

Objective

- 5.1 Promote affordable and safe workforce housing options in partnership with community and business leaders in Flathead County, including the support of new or alternative affordable housing types in traditional neighborhoods.
- 5.2 Help protect and build upon our region's unique natural and cultural attractions in order to draw well-suited businesses and workers.
- 5.3 Promote a connected bike and pedestrian trail system throughout the County as an amenity to attract visitors as well as to promote walkability.
- 5.4 Strengthen and support the development of vibrant downtowns and main streets throughout Flathead County, including promotion of infill and support of zoning changes where appropriate.
- 5.5 Encourage wide range of outdoor and indoor recreational opportunities for residents and visitors.
- 5.6 Engage with local planning processes to promote sustainable growth and discourage sprawl and strip development.

VI. Action Plan

The action plan includes strategic projects, program and activities to support the achievement of the goals and objectives that are part of this economic development strategy. For each task in the action plan, the table identifies the projected Timeframe, Lead Agency, Partners and Resources necessary to accomplish the task. The **Timeframe** indicates the expected life of the project. **Lead Agency** indicates the organization that has agreed to take on responsibility for overseeing and guiding the project from start to finish while securing some or all of the required **Funding and Resources**. **Partners** are additional organizations that may contribute **Funding and Resources** at some point during the life of the project.

This table will provide the basis for MWED and FCEDA Boards as well as other Economic Development, Education and Government Partners to evaluate progress and assess any change in priorities that may occur over the next five years.

Task	Timeframe	Lead Agency	Partners	Funding & Other Resources
1. Continue to provide business assistance through grants & business development (Objectives: 1.4, 2.1, 2.3, 2.6, 4.1, 4.4)	On-going	MWED FCEDA SBDC BEAR Partners	MT Dept. of Commerce, USDA Rural Dev., EDA, MT Dept. of Labor & Industry, MMEC	Big Sky Trust Fund, Rural Business Development Grants, Business, Workforce training funds
2. Continue and expand economic development lending to businesses (Objectives: 2.1, 2.6, 4.1)	On-going	MWED City of Kalispell	Banks Cities and County FCEDA	Revolving loans, Montana Board of Investments, CDBG
3. Procurement Technical Assistant Center (Objectives: 2.3, 2.4, 2.6, 4.1)	On-going	PTAC	MWED FCEDA	U.S. Dept. of Defense, MT Dept. of Transportation
4. Completion of Glacier Rail Park & Core Area Redevelopment and Promotion (Objectives: 2.2, 3.1, 4.5)	Businesses relocate to park in 2018. RR tracks replaced by trail in 2019	City of Kalispell FCEDA	MWED, Chambers of Commerce, Developers, Architects & Engineers	Federal and State Grants, EPA, TIF, County, City of Kalispell, Private Investment

Task	Timeframe	Lead Agency	Partners	Funding & Other Resources
5. Attract rail users and industrial users to new rail park. (Objective: 2.2, 2.4)	On-going	FCEDA MWED	City of Kalispell Chambers of Commerce	Watco Companies BNSF Railway
6. Establish services in Rail Park for occasional users of rail. (Objectives: 3.1, 3.5)	2018-2019	FCEDA	Watco Companies BNSF Railway	
7. Improve Access by Air Travel to the Flathead Valley (Objectives: 3.1, 4.2)	On-going	Glacier AERO	FCEDA MWED Chambers Local Businesses Airport	Private Business Contributions, Federal Grants, FCEDA Guarantees
8. <u>Facilitate education and outreach</u> identifying broadband access new opportunities, assessment, next steps, lead agencies & creation of strategic plan. (Objective: 3.3, 2.6)	2018-2019	MWED	Cities & Towns, Anchor Institutions, Tech Businesses, Service Providers, ImagineIF Libraries	Grants, community funds, Big Sky Trust Fund, Federal Broadband Outreach Grant
9. Develop coordinated national PR campaign to market Flathead County targeted at entrepreneurs, workforce, high tech, green tech and innovative industries, remote employees & telecommuters. (Objective: 2.4, 2.5, 2.6, 2.7, 5.2, 5.4)	2018-2020	MWED	Chambers of Commerce, Cities, GOED, Private Business, Montana Ambassadors	Tourism Grant, ChooseMT InnovateMT
10. Support efforts to market area for meetings and tradeshows & identify opportunities to expand or improve convention facilities/services. (Objective: 2.5, 4.2)	On-going	Local Chambers of Commerce & Convention and Visitor Bureaus	Hospitality industry	MT Dept. of Commerce Tourism grants, Bed Tax

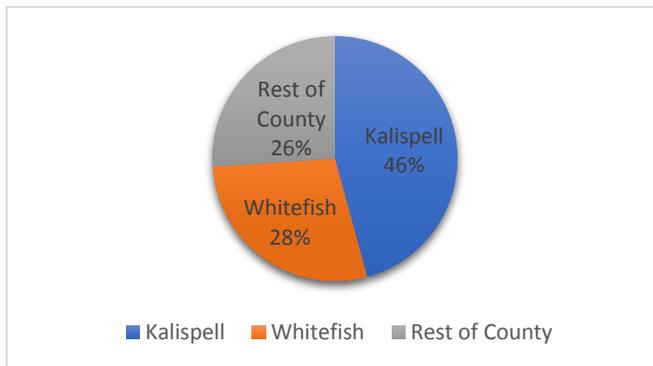
Task	Timeframe	Lead Agency	Partners	Funding & Other Resources
11. Conduct agricultural roundtable to identify ways to promote agriculture and value-added ag industries. (Objective: 2.3, 4.1)	Long Term	TBD	USDA, MT Dept. of Agriculture, MSU-Cooperative Extension, Ag Growers, FVCC, KCVB	Grants, Event fees, sponsorships
12. Redevelopment and planning for industrial sites in Columbia Falls (Objectives: 2.2, 3.2, 3.5, 4.1, 4.5)	2018-2019	City of Columbia Falls	MWED, FCEDA, Columbia Falls Chamber, EPA, DEQ, CFAC, Weyerhaeuser, EDA	Grants, TIF, Brownfield Programs, Superfund, Local Funds
13. Support efforts by communities to develop event space for sports, community centers & performing arts. (Objective: 5.2, 5.5)	To be Determined	Kalispell, Lakeside, Foundation for a Better Bigfork, Bigfork Promotion Group	MWED, Kalispell and Whitefish CVBs, ImagineIF Libraries, Chambers	Community fundraising, foundations, grants, tax revenues, RLF
14. Planning for expansion of health care services and market Flathead County as a regional provider of health care services. (Objectives: 4.3)	On-going	Kalispell Regional Healthcare	MWED, Chambers of Commerce, health care providers, City of Kalispell	
15. Support STEM training and the development of 21 st Century Skills in the Workforce in support of local businesses. (i.e. Making Montana Expo, etc.) (Objectives: 1.1, 1.2 1.3, 1.4)	Annual Event	FVCC, ImagineIF Libraries MWED, School Districts, Chambers of Commerce, Montana Manufacturing Ext. Center, PTAC	GOED, Sponsors	
16. Facilitate a community dialogue on opportunities to increase offerings of four year college degrees	To be determined	FVCC	School Districts, Business leaders, state universities	

(Objectives: 1.1, 1.3, 1.5)				
Task	Timeframe	Lead Agency	Partners	Funding & Other Resources
17. Facilitate ImagineIF Library site selection & fundraising for new facilities (Objective: 1.3, 3.5, 5.4)	To be Determined	ImagineIF Library & Flathead County	MWED, City of Kalispell, Bigfork organizations, City of Columbia Falls	Planning Grants TIF Bonds
18. Address affordable – workforce housing issues (Objective: 5.1)	On-going	Housing Agencies, CAP, Cities, County, Land Trusts	Residential Developers, MT Dept. of Commerce	Whitefish Housing Assessment, Grants
19. Connect trails systems throughout Flathead County. (Objectives: 5.3, 5.5)	On-going	Flathead County Kalispell Whitefish Columbia Falls Bigfork	Montana Dept. of Transportation, Recreation Groups	Local funds, grants, transportation funds, fundraising
20. Execute on downtown planning efforts (Objectives: 5.2, 5.4, 5.6)	On-going	Kalispell Whitefish Columbia Falls	MWED FCEDA	Local funds & grants for planning efforts
21. Participate in local govt planning efforts to promote CEDS goals (Objectives: 3.1, 3.2, 3.5, 5.2, 5.4, 5.6)	On-going	Flathead County Kalispell Whitefish Columbia Falls	MWED	Local funds & grants for planning efforts
22. Support investment and new jobs related to energy generation and power supply. Objectives: (2.4, 3.4, 3.5)	As needed	Flathead Electric Coop	BPA, U.S. DOE, alternative energy producers	To be determined

Appendix A: Survey Summary

A total of 142 people responded to the survey. Figure 1 indicates the distribution of respondents within the County

Figure 1: Location of Survey Respondent



Survey respondents were asked to rank various policies from the Flathead County Comprehensive Economic Development Strategy – 2012 on a scale of one to four with one being very high priority and four being low priority. The following tables indicates the results of these rankings.

1. Strategies from CEDS Survey with Highest Priority

Strategy (Listed in order with highest priority listed first)
1. Support improvements in road quality and rail and air availability to lower cost of travel and transport of goods.
2. Help protect and build upon our region’s unique natural and cultural attractions in order to draw well-suited businesses and workers.
3. Support improvements and availability of affordable and reliable high-speed broadband to enhance education, public safety, health care, business and government services.*
4. Provide necessary resources and practical support to increase the rate of attainment of high school and college graduation of our local workforce. (Regional competitiveness increases with a skilled workforce and higher wage jobs follow.)
5. Support affordable and safe workforce housing options in partnership with community and business leaders in the valley.
6. Invest in existing local industrial sites to attract 21 st century businesses that create well-paid jobs and increase and diversify the tax base.
7. Support improvements to water/sewer infrastructure.
8. Reduce energy costs for residents and business through conservation, efficiency and investments in the local energy supply.
9. Increase and efficiently administer existing resources to support new and expanding business.
10. Promote the area as a destination for year-round leisure travel, meeting and convention opportunities.

2. Strategies from CEDS Survey with Medium Priority

Strategy (Listed in order with highest priority listed first)
1. Expand opportunities for students to engage in learning with local businesses. (e.g. internships and apprenticeships.
2. Determine which business development and growth activities are missing or are burdensome, and determine how they can be supplied or mitigated.
3. Investigate creative ways to improve productivity of the current workforce.
4. Identify and mobilize experienced, successful and skilled professionals to provide mentoring and business counseling services.
5. Support workable local options tax legislation that enable local governments to raise funds for specific local projects.
6. Provide access to non-traditional capital to supplement lending and investor activity.
7. Enhance the County Fairgrounds as an asset to the county, communities and to business.
8. Identify and/or provide services for quality market analyses for local entrepreneurs and businesses from a qualified university with market research experience.

1. Strategies from CEDS Survey with Lowest Priority

Strategy (Listed in order with lowest priority listed first)
1. Seek creative options to increase the availability of larger buildings for manufacturing and warehousing specifications.
2. Educate employers/supervisors on diverse recruitment strategies.
3. Create a Centralize Hub dedicated to informing, education and assisting entrepreneurs and business.
4. Support tourism by creating a large public assembly and convention hall, since venues in the county are limited due to size and condition.*

* Kalispell ranked this a 2.39. Whitefish ranked this a lower priority with a rating of 2.98.

In addition to ranking economic development strategies, survey respondents were asked about strengths and weaknesses.

2. Strengths

Comment	Total
*Outdoor Recreation - Natural Beauty - Pristine Environment - Glacier National Park - Skiing - Lakes	27
Quality of life	14
Flathead Valley Community College	14
*Tourism - Destination Spot	11
*Work force - work ethic, educated, talented	9
Involved Community - Volunteerism - Collaboration - Philanthropy	6
People want to live here	5
Low cost of living	4
Not overcrowded - low population density - rural - small town	4
*Quality health care services	4

* Represent strengths that were also identified at the majority of focus group meetings. Focus groups also identified “Business Friendly with good Chambers of Commerce” as a strength.

3. Weakness

Comment	Total
*Lack of quality affordable housing - shortage of workforce housing - high housing costs	18
Lack of high paying jobs - low wages compared to other places	17
*Development - sprawl - ugly - strip development -harms environment-unregulated growth - casinos - lack of zoning and planning in county - too many big box stores	17
High air fares - not enough choice for air service	17
Rural - remote location - far from big markets	16
Aging roads and infrastructure - need investment in new roads - stormwater facilities	12
Workforce lacks skills - are not qualified. Need to recruit from outside area to fill positions	12
County elected officials not progressive - won't invest in infrastructure, oppose tax increases, no vision - lack of cooperation with cities	10
Poor business climate- must fight environmentalists, over-regulations, disregard of property rights, obsolete regulations, resistance to growth	7
High cost of living	6
Too reliant on tourism - need to diversify economy - lack of value added processing	5
*Slow Internet - Broadband	5

* Represent weaknesses that were also identified at the majority of focus group meetings. Focus groups also identified “Seasonal Economy/Cold Weather”.

4. Strategies

Comment	Total
Workforce development – Work with FVCC, Vo-Tech for high schools, mentoring, apprenticeships, businesses in the schools	20
*Invest in infrastructure - roads, water, sewer - need county transportation plan	16
*KalisPELL - Downtown plan - redevelopment-support core area plan - renovate old buildings	16
Protect outdoor recreation access - protect environment - more green space	14
*Good planning to manage growth - avoid sprawl - strip development - adopt design standards	13
Affordable housing strategy - address rental housing shortage	13
High-Tech Jobs - IT Jobs	11
Tax or financial incentives to attract new manufacturing businesses - start-up or expand business. Access to financing.	11
Attract more high-wage jobs or living wages	9
Promote entrepreneurship and mentoring. Small business assistance	9

Plan for tourism - promote area to attract more tourism - events in shoulder season - coordination between agencies	9
Promote better air service	7
Recruit low-impact, clean industry, green energy businesses	6
Expand public transit	6
Promotion for all communities in the county - Cooperation/coordination between agencies - Engage all stakeholders	6

* Represent weaknesses that were also identified at the majority of focus group meetings.

Projects

Comments	Total
*Expand bike paths and trails system throughout county	19
Convention Center - Events center - hockey, trade shows, meeting rooms, 500+	13
Support FVCC - Investigate Four-year college - four year degrees	12
Improve broadband services	12
*Indoor sports center - indoor pool - National sports training center -	10
Improve fairground	5
Kalispell performance center	4
Freight and shipping center to provide better/cheaper access to rail and truck shipping	4
Affordable - Workforce housing projects	4
Rail Park	4

* Represent weaknesses that were also identified at the majority of focus group meetings.

Appendix B: Focus Group Summary

Whitefish Chamber of Commerce CEDS Meeting Notes 3-15-17

Strengths

- Whitefish Trails
 - Recreation
 - Dog park
- Tourism- Is economic development
- Ski Hill
- Whitefish Lake – public access to water
- Downtown Shopping/Culinary Center
- Small town atmosphere
- Whitefish is Gateway to Glacier
- Real estate – People want to be here
- Lifestyle – Amenities
- Clean Air
- Health Care
- Fish & wildlife

Challenges

- Air Services- High Cost, need more flights
- Truck Transportation
- Increased cost of living /real estate with stagnant wages
- Lack of redundancy in fiber optic connections
- Workforce lack of workers and quality of labor force
- Connections to coast & lack of proximity to large metro area
- Better City/county relationships for better planning in area around Whitefish

Trends

- Increases in visitation
- Less of a shoulder season
- Rising costs for construction/less land to build on

- More difficult to get permitted and longer time to build
- Commercial construction has picked up
 - Commercial growth
- Residential
 - Quality of construction going down
 - Price going up
 - Lack of workforce
 - Labor force cost going up
- Housing needs assessment – going to RFP on Wed.
- Some local employers addressing housing issues on their own (boarding house - Best Western on site employee housing)
- Developers are not building affordable housing. There are no carrots or sticks. They are going after high-end market
- More space outside city limits (i.e. US 93 south)
- Health care – increasing number of employees put stress on housing prices
- Manufacturing – lack of zoned industrial areas in Whitefish
 - Small niche manufacturing such as Hurrah, distillery, Great Northern Brewery
 - Distillery – looking at expansion near airport – Evergreen area
- Boomers are moving here- retired
 - Not attracting entrepreneurs
- Teleworkers/telecommuters living/working here are looking for fiber connections & Wi-Fi Hotspots

Strategies

- Cultivate IT industry. Need fiber should be priority (i.e. Bozeman) Investment
- Transportation/airport Incentives
- Summer time transit services to reduce need for parking
- Transportation/transit to go with affordable housing
- Trying to build year-round economy
- Need to assess infrastructure – must support new housing
- Will need to build up – increase height limits – contribute to parking
- Sprawl is a threat- Concerned with the county’s US 93 south corridor plan
- Target industries such as high tech and clean industry, telecommuters (i.e. technology professionals)

Columbia Falls CEDS Meeting Notes

3-14-17

Strengths

- Businesses that are opening continue to thrive
- Destination Spot – helps recruiting for employment
- Bedroom Community – wages are being spent in Columbia Falls
- Small unique – locally owned businesses - unique character, not a chain
- Easy for businesses to open- not over regulated
- Tourism gateway to GNP – Incredible opportunity but need to maintain wilderness/small town
- Trust for public land – C. Falls potential pilot for conservation plan (waiting for notice)
- Affordable Community
- Work Force – Available and willing to work
- Industrial park – needs infrastructure to make into rail park
- ImagineIF Libraries

Weaknesses

- HWY Construction in fall could be disruptive to business (Fall '17 to Spring '18)
- Indecisiveness on who/what is C. Falls – Tourism? Will that change community character? Need to sell strengths
 - Plum Creek site could be opportunity for redevelopment. What manufacturers would be a good fit? Target renewable energy-cluster for redevelopment of site (i.e. solar, Vinz, Stoltze bio energy)
- Loss of higher wage Jobs when CFAC/Plum creek closed
- Newcomers not familiar with old way of CFAC/Plum Creek
- High tech jobs – need fiber optic
- Need more activities in C Falls so people don't have to leave community for entertainment

Strategies

- Inventory of commercial/industrial space & what is available
 - What are gaps & what do people want/need
- Support Mom & Pop Stores
- Inventory broadband/planning. What does Columbia Falls need to be future proof?

Trends

- Increase in Visitation (supports business but hard on infrastructure)
- Young adults that moved away want to return
- People are moving here for lifestyle
- People are creating their own jobs/business so they can live here
- How can entrepreneurs tap into providing services to corporations located outside of valley?
- Job Mobility – teleworkers/telecommuters
- Building trends –
 - Not much commercial
 - Lack of affordable housing (hodgepodge of new/old poor maintained)
- Opportunities for social life has improved but needs more (i.e. water/kayaking park on river. . .)
- No Shopping – Murdocks is nice
- Do not want commercial sprawl
- Property tax increases

Bigfork

CEDS Meeting Notes

4-18-17

Assets

- Outdoor opportunities – Lake/Glacier Park
- Low Pop. Density
- Generous Community – 4% of GDP goes to charitable giving
- Affordable to live – as opposed to west coast. Particularly Bigfork since not municipality
- No traffic issues
- Affordable Labor
- General demeanor of people more enjoyable to employ, work, build product
- Community recently passed new mil for schools
- Hard working
- Bigfork – small but close to Kalispell – not isolated
- Hospital
- Make it work, get it done attitude/culture
- Ability to work together – bring different resources to a community project
- Entrepreneurship

Challenges

- Shortage of entry level workers
- Lots of entrepreneurs/self-employed – not innovative in creating lots of jobs
- Aging population – working longer and not giving up jobs to younger workers
 - When there is retirement – not experienced workers to take place (experience gap)
- Not jobs for higher level professionals that want to move back
- Limited opportunity for professional advancement
- Seasonal Economy- Bigfork
 - Challenge for small business (3-4 Peak months)
 - Snow birds – Just have summer season
- Managing Growth - Next 50 Years will see a lot of changes
 - Access to internet –people can work remotely
 - More urban development – Need to determine what kind of growth/how it will happen

- Broadband _parts of Bigfork don't have internet (Echo Lake – No c. link)
 - Internet is essential utility – people will not move here if they don't have
- In city limits is ok – outside is not
- Nonprofit study showing BB
- Bigfork – High resistance to change. Some residents only see Bigfork as village by the bay arts community & don't want to change
- Not being incorporated is a challenge to manage growth and fund infrastructure needs
- Don't have option for community to incorporate
- Housing/rental shortage
- There is lack of development of new housing
- Short term rentals driving up prices
- Affordable for work force entry level/teachers

Projects/Action

- Voluntary Assessment as alternative to Resort Tax
 - Voluntary assessment – Business contribute 1% assessment.
 - Funds go to the Bigfork Promotion Group
- Riverside trail project – Construction + Maintenance (who would maintain?)
- Pedestrian connectivity on Hwy 35 in front of businesses
- Parking for downtown
- Lots of opportunities – need to do planning & need to coordinate between groups Chamber, Business Promotion Group and Community Foundation for a Better Bigfork
- Lakefront park to provide more lake access – look for opportunities to purchase land
- Update Neighborhood Plan
- Incorporating as a municipality is not realistic
- Storm drainage downtown – recently improved with a Special Improvement District
- Hydro electric dam? Privately owned – Pacific Corp
- Community center that could include the following organizations:
 - County Library – one in Bigfork
 - ACES – low income after school programs needs space
 - Senior center needs better space
- Invasive aquatic species needs to be addressed

Lakeside CEDS Meeting Notes

4-17-17

- Community garden feasibility study
 - Baptist church – now have it
- Community club civic group
 - Fundraising for various events/projects
 - Frosty Snow Men
 - Lucky police car
 - Spaghetti feed
 - Fall Harvest apples/plums
- Mural Project – need to do feasibility study
 - Needs support of community
 - Blank walls, plywood for soft launch (3-6) as pilot
 - 1st year (2018) proof of concept
 - 2nd year+ add to inventory & expand each year
- Unique identity
- Artist volunteer project

Assets

- Lake, river, mountains, 85% public land, outdoor recreation county wide
 - Lakeside – lake frontage/ski hill/park on lake
 - Doesn't have historic downtown
- Does not have big harbor marina (Lakeside Club)
 - Has privately owned dock, but is at capacity
- Need bigger dock system
- Far West Tour Boat is a draw and creates traffic (not enough parking)
- Need more parking
- Need better sea wall to protect against wave action
- Docks may be for sale- likely would be improved
- Tamarack Brewery
- Success in getting events
 - Dragon Boat Race
 - Ski Joring
- Foy's to Blacktail Trail

- Will be paving road all the way up to Blacktail Ski Area
- Community will work together to get things done
- Volunteerism – retired people who have time and experience
- Chamber of Commerce

Challenges

- Dock is poorly managed, needs improvement
- No Hotel – no overnight stays
- Visitors stay @ VRBO – challenge to getting events
- Need Resort Property – Hotel/restaurant/meeting place
- Infrastructure
 - Parking
 - Sidewalks
 - Storm water/sewer
 - US 93 requires working with MDT
 - Affects more development of private property doesn't impede traffic
 - Need storm system for whole town
 - Water/sewer district – well run/has capacity
- Funding of projects – need to identify how to fund. Get impacts from tourists/but they don't contribute to tax base

Trends

- Slow uptick of: -
 - Housing Starts – inventory down, prices going up
 - Lot of land subdivided before housing bust
 - Lots being sold/ inventory starting going down
- Feeder market – Seattle, CA, CO, TX, buying homes
 - + Montana – east side of divide
- Far West Tour Bus – increase in passenger every year for 4 years – Project an increase from last year
- Economy improving – locals have more to spend in local businesses
- Somers – Best Western is not a destination hotel – can't walk to anything but are booked – they have meeting space
- VRBO – mostly resort housing to begin with not impacting affordable housing
- Not adequate housing inventory for workforce & affordable housing there is a demand

Projects

- Asset – Quick Response Unit – successful fundraising
- Lakeside Community auditorium
- Partnership school district & nonprofit to build performing arts center
 - Site selection has been done
 - Concept- symphony orchestra together – seat 500-750
 - School could use
 - Like Whitefish, Bigfork, but larger
 - Parking part of project could help with parking space
 - Looking for grants
- Create SID for infrastructure – has good working relationship with county
- Green box site worked with county & was able to keep

Evergreen CEDS Meeting Notes

4-17-17

Strengths

- Community Involvement
- People
- Snappy's
- Sense of ownership
- Evergreen Chamber of Commerce
- Mountains/Lake- Tourism opportunities
- Can do attitude
- Responsive/Accessible elected officials
- Education – Helena Flats/FVCC - enrollment tied to economy
- Excellent professional workers
- Health Care – National & Regional Draw
- Good access to finance & insurance resources
- Great housing resources

Challenges

- Rising cost of health care (national problem)
- Evergreen – drugs/crime – safety. Flathead County getting worse over last 5 years
 - Opioids – Alcohol are number one problem.
- Law enforcement – Jail is at capacity so criminals are back on street
 - Need to expand jail to handle population. Growth & increased drug use
- Crime is worse in the county than other parts of state because there is more people here
- Improve gateway to communities (need county to address transitions, ie from airport to evergreen)
- Improve perception of Evergreen (ghetto), need help from county
- Business – beautification
- Flooding problems – HWY 2 improvements have helped
- Community needs to get involved – in school, need volunteers
- Cheapest housing is in Evergreen – also attracts people with criminal history because they can't afford other places
- Need messaging about good things
- Housing shortage especially in the Mid-income \$185,000-\$300,000 range
- Don't need more mobile home parks in Evergreen

Projects

- Business space available
- Satellite Sheriff's office in Evergreen
 - Increase presence of law enforcement/increase visibility
- Neighborhood Watch for Business district to reduce crime
 - Communication among businesses – Be pro –active
- Connect bike trails from Kalispell to C. Falls, thru Evergreen (Evergreen Dr. West)
 - More bike networks
- Continue work on rail park
- Link new county library to trails – connect schools
- Improve Reserve Street from US Hwy 93 to US Hwy 2
- HWY 2 intersection improvements at K Mart and Snappy's
- Need intersection improvements at Helena Flats -Reserve Drive – Need corridor plan for the entire length of corridor to identify improvements
- County wide mill levy to support bike paths
- Consider TIF district for Evergreen to pay for trail
 - Planning grant for TIF
- Beautification/street lights/ landscape
- Re-invent Evergreen- build on rail park project
- Build on zoning overlay
- Community center- family activities
 - Park and recreation sites should connect with trails
 - Include building meeting space- connect with trails
 - Build identity and pride
- Coordinate with community groups to get involved in projects – Rotary/Scouts/Lions

Trends

- Housing start up
- Positive mental attitude- pride
- Economy is growing

Kalispell CEDS Meeting Notes

4-26-17

Strengths

- Scenery
- Outdoor Access
- Rail Park
- Education system secondary/post 2nd
 - Informal learning – ImagineIF Libraries
- Bicycle/pedestrian trails- continue to build connections
- Health Care resources
- Innovative Food/beverage scene – microbrew/distilleries/restaurants
- Community celebrations/fairgrounds
- Financial/Econ dev.
- Very strong nonprofit network
- Low crime rate/relative security
- Welcoming/accepting
- Award winning library system

Challenges

- Brownfields
- Affordable Housing – entry level workforce
 - Rental shortage
 - Need low income housing
- Funding for public services – not good
- Large income disparity – promote living wages
- Lack of current technology
- Lack of full spectrum of resources for entrepreneurs
- Improve Entrepreneur Resources
 - FVCC
 - Mentors
 - Need one place to go
 - MWED start up, weekend, expand
 - Match with investors

- Need to coordinate among different resources
- Realities of operating in seasonal economy (ie tourist related/construction)
- Liquor license laws are restrictive
- Strategic plan for county organization
- No 4-year university
- Lack of sunshine

Projects

- Live performance venue – Kalispell
- Parking garages for downtown
- More funds for Glacier Aero
- Light rail – Polson to WF
- New expanded library – Kalispell/C. Falls/Bigfork
- Regional trail system connect all 3 communities to GNP
 - Connect all pieces
- Central conference/convention facility – trade shows
 - Coordinate with performing arts
 - 500-900 capacity
- Indoor sports facility – multi-purpose – hockey
- Modern shared work space for startup/ lone eagles
- Work force development initiative
- More energy downtown after 5 pm
- Streamline/review permits/regulations

Trends

- Food bank- customer base – more young families/ people work multiple jobs to make ends meet/people with no health insurance
- Need more housing. We have a growing population & not enough rentals
- 2 story 3br house – not as much demand but still keep building
- Vacation rentals- air BNB contribute to housing shortage
- Growing medical sector – becoming regional center
- Shift in job base – more health care
- Kalispell – retail base for visitors
- More hotel rooms and visitors
- More e-commerce