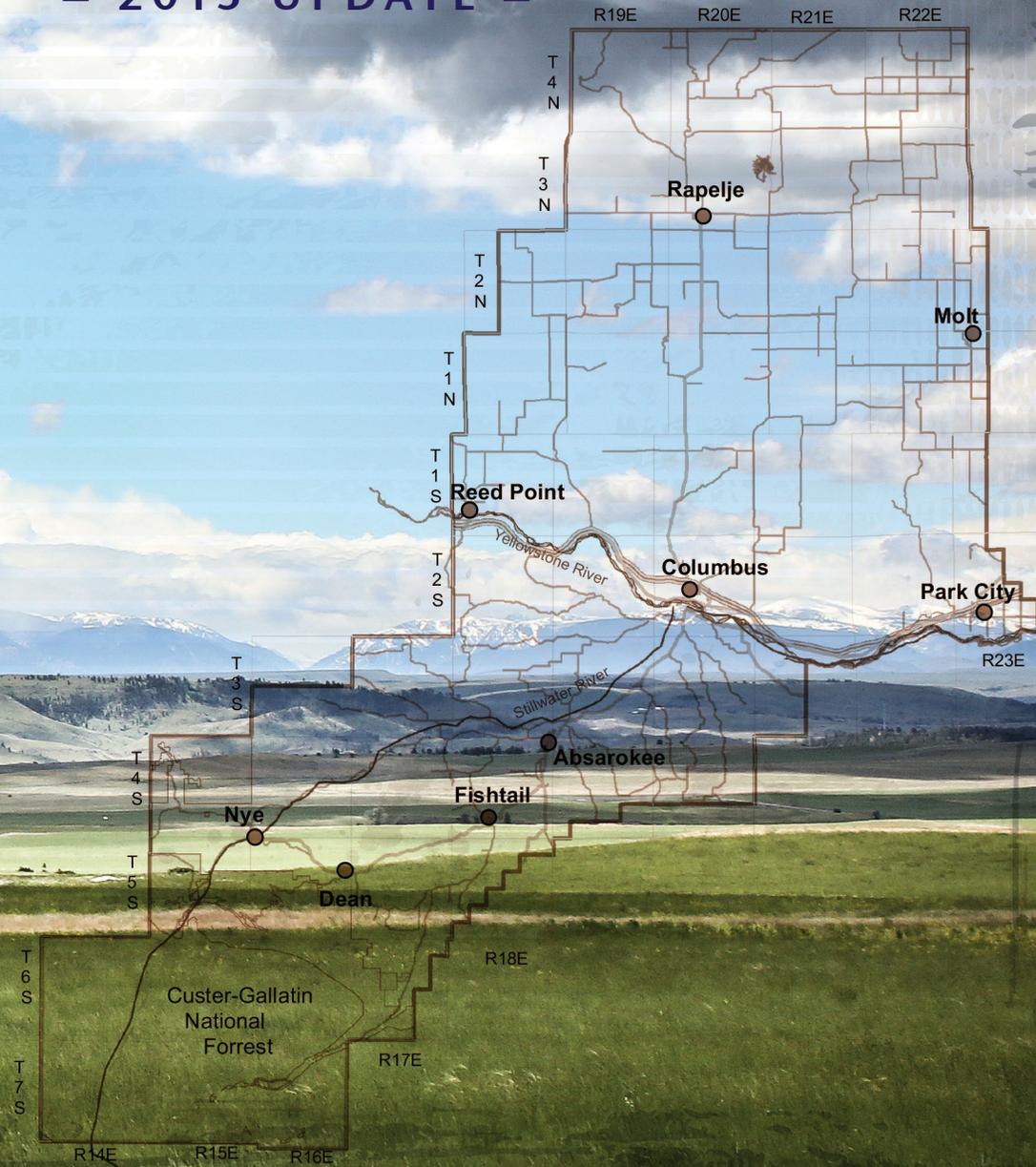




STILLWATER COUNTY
ECONOMIC DEVELOPMENT

**OVERALL ECONOMIC
DEVELOPMENT PLAN**

– 2015 UPDATE –



A special **THANK YOU** to
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INTRODUCTION

The Stillwater County Economic Development Department and the Economic Development Committee completed work on an Overall Economic Development Plan for Stillwater County in 2015. The Plan was requested by the Stillwater County Board of Commissioners to be used as a strategic planning document for economic development efforts throughout Stillwater County. The Plan contains six sections on the committee, historical assessment of past development efforts, the area and its economy, potentials for economic development, a development strategy and plan for implementation. Copies of the Stillwater County, Overall Economic Development Plan are available in the Stillwater County Economic Development Office.

The following goal and objectives were established to guide economic development efforts.

Goal

To provide a method for guiding and coordinating the efforts of local governments, business, industry and civic organizations concerned with the economic development of the County for the purpose of creating a more stable and diversified economy with new employment opportunities to increase personal income and expand the local tax base.

Long Term Objectives

1. Encourage the development and economic use of natural resources in the county especially minerals and agricultural products. Appropriate conservation measures are also endorsed for soil, water, air and other significant natural resources.
2. Work with existing businesses and industry having expansion plans and actively seek new businesses interested in the county. Inform prospects of advantages of locating in the county and assist with financial arrangements for infrastructure or site development whenever possible.
3. Promote the County to attract new business, industry, and visitors to increase economic activity. Cooperate with civic groups in the county on tourism promotions and public relation efforts. Work in partnership with other Montana programs and continue to promote the Montana Brand.

Short Term Objectives

1. Utilize an Overall Economic Development Committee with diverse representation and involvement in the program. The committee will summarize and analyze the area and its economy, identify potential for economic development, recommend an economic development and investment strategy, and inform county residents of program plans and accomplishments.
2. Determine additional needs for community facilities and services. Study existing road system, water supply, sewer facilities, industrial parks, health care services, fire protection, parks and recreation, and the adequacy of housing necessary to support economic development.
3. Identify continuing education and training needs for the county work force, unemployed,

underemployed, and identify organizational structure necessary to meet these needs. Special emphasis will be placed on telecommunications, computer literacy, and automation. Involve appropriate organizations to coordinate this effort as needed.

Public improvement projects and planning projects are recommended to the Stillwater County Commissioners and Columbus Town Council in a one year plan for implementation and a multi-year plan. The Economic Development Committee will assist the Economic Development Coordinator and will continue to monitor economic conditions of the county. Key indicators include labor statistics, population projections, taxable valuation, available financial resources and opportunities for economic development.

SECTION I
THE ECONOMIC DEVELOPMENT COMMITTEE

The Economic Development Committee (EDC) members have been appointed by the Stillwater County Board of Commissioners and serve in an advisory capacity to the Commissioners while they assist the Economic Development Coordinator with updating the Overall Economic Development Plan.

Economic Development Committee Members

| Members | Position | Occupation | Race |
|---|--|---|-------------|
| Webb Mandeville 342 W. 5 th Avenue N. Columbus, MT 59019 | Chair (Columbus) | Real Estate / Insurance | Caucasian |
| Tyrel Hamilton 96 Youngs Point Road Park City, MT 59063 | Vice-Chair (Park City) | Hardware Store / Retail | Caucasian |
| Edward May 53 W. Trees Road Reed Point, MT 59069 | Member (Reed Point) | Aerospace Engineer | Caucasian |
| Tom Hohn 1937 Highway 10 Columbus, MT 59019 | Member (Columbus) | Petroleum Engineer | Caucasian |
| Travis West 116 Melody Lane Columbus, MT 59019 | Member (Columbus) | Engineer/Land Surveyor | Caucasian |
| Lindsay Williams 5 Bull Drive Columbus, MT 59019 | Member (Columbus) | Rancher / Agriculture | Caucasian |
| Joe Cross 851 N. 3 rd Street Columbus, MT 59019 | Member (Columbus) | Real Estate / Contractor | Caucasian |
| John Beaudry PO Box 1330 Columbus, MT 59019 | Member (Stillwater Mining Company) | Mining Industry | Caucasian |
| Don Scheafer PO Box 245 Absarokee, MT 59019 | Member (Absarokee) | Retired | Caucasian |
| Terry Nystul PO Box 1535 Columbus, MT 59019 | Member (Town Council Representative) | Retired | Caucasian |
| Luke Walawander lwalawander@beartooth.org | At Large Member | Beartooth RC&D Economic Development Director | |

STILLWATER COUNTY

PO Box 970
Columbus, MT 59019
322-8010
www.stillwater.mt.gov

STILLWATER COUNTY COMMISSIONERS

Dennis Shupak, Chairman (2015)
Maureen Davey, Member
Gerald “Jerry” Dell, Member

OTHER STILLWATER COUNTY OFFICIALS

| Name | Position |
|-----------------------------|---|
| Elected Officials | |
| Nancy Rhode | County Attorney |
| Cliff Brophy | Sheriff |
| Lee Cornell | Justice of Peace |
| Sandy Fox | Clerk of District Court |
| Jerry Friend | Treasurer |
| Heidi Stadel | Clerk and Recorder |
| Judy Martin | Superintendent of Schools |
| County Departments | |
| Mark Schreiner | Road Superintendent |
| CTA Group | Planner |
| Joe Morse | Human Resources / Financial Specialist |
| Marissa Hauge | Economic Development Coordinator |
| Stephanie Moodry | Sanitarian |
| Tammy Rasmussen | Welfare Dept/Family Services |
| Lisa Terry Lee Schmelzer | MSU Extension Agents |
| Della Haverland | Librarian |
| Carol Arkell | GIS/DES/ Rural Addressing/ Fire Warden |
| Scott Waltner | Solid Waste Supervisor |
| Will Patterson | Weed District Coordinator |

TOWN OF COLUMBUS

P.O. Box 549
Columbus, MT 59019
322-5313

www.townofcolumbus.com

TOWN COUNCIL

Gary Woltermann, Mayor
Terry Nystul
Paul Edwards
Patty Sundberg
Harold Houghton
Jon Brown
Gary Anderson

OTHER TOWN OF COLUMBUS OFFICIALS

| Name | Position |
|------------------|-----------------------|
| Ron Barndt | Town Clerk |
| Dennis Holten | Public Works Director |
| Bill Pronovost | Chief of Police |
| Doug Howard | Town Attorney |
| Rich Cowger | Fire Chief |
| Christine Deacon | Animal Control |

SECTION II

HISTORICAL ASSESSMENT OF PAST DEVELOPMENT EFFORTS BRIEF HISTORY OF AREA ECONOMY

Stillwater County, Montana has a very interesting economic history. The early history of the area included Crow Indians until the 1890's, explorers including Lewis and Clark in 1807 and John Bozeman in 1860's, mining prospecting began in the Stillwater Complex in 1860's, Northern Pacific Railroad established a rail line through the area in the 1880's, homesteading began in the 1890's and Stillwater County economy has a history of mining and agriculture as basic industries.

Large deposits of copper and nickel were discovered in the Stillwater Complex in the 1890's and Minneapolis Mining Co. developed some claims but interest shifted to the large chrome deposits of chromite during World War II in the early 1940's by Anaconda Copper Co. and again during the Korean War in the early 1950's and ended in the early 1960's with the loss of 250 jobs. The most recent exploration was for platinum group metals which began in the late 1960's by Johns Manville and was later joined by Chevron in 1979 to form a joint venture called Stillwater PGM Resources. Anaconda Minerals also continued exploration work on their claims in the Stillwater complex through the early 1980's. Stillwater Mining Company was formed in 1983 which currently includes Chevron USA, Inc., Mansville Sales Corporation and LAC Minerals (USA), Inc. Development of the Stillwater Mine began in 1985 and commercial production began in 1986. Stillwater Mining Company currently employs over 1,600 people with approximately 575 employees living within Stillwater County. The top five private employers in Stillwater County as of 2013 are Stillwater Mining Company, Montana Silversmiths, Town Pump, Special K Ranch, and the Columbus IGA Plus.

Initial agricultural development of Stillwater County came between 1900 and 1920. This was the era of homesteading when more than 1,300 farms and ranches were established in Stillwater County. The drought of the 1920's and economic depression of the 1930's reduced the numbers of homesteaders significantly as the county's population declined by almost 2,000 people. Over a quarter of the workforce in Stillwater County are involved in agriculture, forestry, fishing and hunting, and mining. The number of farm or ranch proprietors has remained relatively stable over the past decade. Drought and grasshopper infestations have also complicated the problems for farmers and ranchers in Stillwater County during the 1980's. In 2012 the Census of Agriculture reported that the number of farms and ranches in Stillwater County was 593, which were down slightly from 2007 when there were 635 farms and ranches. In the past decade, farm and ranch concerns continued to be drought, with the exception of 2014. Other challenges are that the Environmental Protection Agency has either closed down or is now highly regulating local grain elevators requiring ranchers to drive considerably longer distances to deliver grain and their other goods. The Bakken oil boom in the eastern portion of Montana and western North Dakota has taken a great deal of the farmers' and ranchers' workforce and created considerable cost increases of supplies, parts, and heavy equipment rentals. Farmers and ranchers have seen record breaking high livestock prices in 2013 and 2014. The average price in 2014 for feeder cattle was \$2.40 per pound. This brought an average of \$500 more per head than the previous years. The U.S. Department of Agriculture reported Montana cattle sales near \$2 billion in 2014 which was a significant

increase over the previous record setting year with sales of \$1.52 billion. Wheat prices were low in August 2014 and only averaged \$4.74 per bushel which was the lowest price in August since 2006. Falling crop prices are due to the global abundance of wheat and other crops. Still the value of Montana's wheat crop has exceeded \$1 billion in six of the past seven years according to the U.S. Department of Agriculture.

The communities of Absarokee, Columbus, Fishtail, Molt, Nye, Park City, Rapelje and Reed Point developed as service centers for the agricultural and mining based economy of Stillwater County. These communities now provide a variety of goods and services which contribute to the total economy with 1,009 businesses providing 7,318 jobs to the Stillwater County population of 9,131 residents as of 2012.

ASSESSMENT OF PREVIOUS ECONOMIC DEVELOPMENT EFFORTS

Previous economic development efforts have been delegated to the Stillwater City-County Planning Board by the Columbus Town Council and Stillwater County Commissioners. The County Planning Department was responsible for all the economic development planning until late 2006 when a dedicated Economic Development Department was created.

A comprehensive area plan for sewer and water was completed in 1970. Subsequent Sewer Facility plans were completed for Absarokee collection system in 1975 and Absarokee treatment system in 1977, amended in 1984, a Preliminary Engineering Report was done for needed improvements in 2005, and implantation of some of the improvements began in 2014. The Reed Point Sewage System facility Plan was completed in 1976 and updated in 1993, Fishtail Sewage System Facility Plan in 1976, Park City Sewer Plans were completed in 1967 with changes in 1978, and Columbus sewer plans were completed in 1988 with a new Wastewater Treatment Facility completed in 2000.

In 1983 a needs assessment was completed for Stillwater County and the Town of Columbus. The needs assessment was updated in 1986, 1992, Stillwater County Capital Improvements Plan (CIP) was completed in 2008, and a Columbus Growth Policy updated in 2012 and a County Growth Policy last updated in 2007. The primary focus of the needs assessment, CIP, and Growth Policies was the need to improve the County's infrastructure including roads, bridges, water and sewer systems, solid waste collection and disposal facilities, fire protection, parking lots of public buildings, courthouse, library, and museum buildings, parks and recreation sites. Stillwater County and the Town of Columbus routinely updated their Growth Policies. The State of Montana requires Growth Policies be reviewed every 5 years and updated every 10 years.

Since 1997 the following projects have been completed or are in progress. Town of Columbus completed construction on a new Town Hall in 2000 and a new public works building in 2013. Stillwater County developed a solid waste transfer site just outside of Columbus in 2000, upgraded the Molt-Rapelje Road, and repaired and resurfaced seven miles of the West Rosebud Road. The County Solid Waste Department completed construction on their new shop in 2005. Stillwater County Road and Bridge began planning in 2014 and construction on new County Shops is set to start in 2015. Stillwater County has begun the process of assessing the County's Courthouse improvement issues with architects looking at options of renovating the current courthouse and adding additional offices, renovating the old

hospital building on Quarry to accommodate county offices, or building a new public building to house public offices and the law and justice center.

Montana Department of Transportation completed reconstruction of Highway 78 between Columbus and Absarokee in 2010 and the Columbus-Absarokee South portion of Highway 78 is scheduled to be done by 2016. Other major MDT improvements within Stillwater County include, replacement of the Reed Point Bridge over the Yellowstone River in 2000, assisting the County and the Stillwater Mine with the complete reconstruction of the Nye Road/Highway 419 in 2005, repairing a section of the Rapelje Road/Highway 306 in 2007, paving of the Joliet Road/Highway 421 in 2011, bridge repair of all Interstate 90 bridges within Stillwater County. Interstate 90 will be resurfaced starting at Columbus west through to the Sweet Grass County line.

In addition, a Hard Rock Mining Economic Impact Plan was negotiated with Stillwater Mining Company in 1985, amended in 1988 and in 1998. Metal Mines License Tax (MMLT) revenue also provides funding for the county's economic development and planning efforts. Stillwater County receives semi-annual reports from the impacted School Districts. The impact reports establish the amount of MMLT revenue that is given to the County and distributed among the impacted schools districts.

The Columbus Airport has records of operation starting in 1953. The airport remained essentially the same until 1961, when the runway and connecting taxiway were paved. The airport undertook a major renovation in 1998 and completed a taxiway extension in 2002. In 2010 the airport was renamed the Columbus Airport – Woltermann Memorial and is classified as a General Aviation (GA) Airport.

Other major improvement projects for the Town of Columbus include a new Waste Water Treatment facility in 1999, industrial park improvements and a new City Hall in 2000, and major water main replacements in 2014. The Town also continually replaces deteriorated water and sewer lines on an annual basis.

Several civic groups have been active in community development efforts. The Park City Development Council was formed in 1975 and continues to be active today. The Reed Point Community Club has developed a foundation program for a multi-purpose community building. Absarokee has an active Civic Club. There are historical societies in Columbus and Absarokee. Absarokee has an active Swimming Pool Association as well as a Beartooth Park and Recreation District. The Town of Columbus maintains all the parks and the community pool within the city limits with their Park and Recreation budget. The Nye Community Foundation was established in 1999 and the Absarokee Community Foundation in 2000 to support and promote projects that will benefit the residents within their communities. In 2008 the Columbus Community Foundation was established to assist other organizations that assist Columbus residents. There are community clubs in Beehive, Dean, Fishtail, and Nye. The Kiwanis Club is active in the county along with VFW, American Legion Post, a Masonic Lodge. 4-H and FFA Chapters have been active in the county for years in addition to the Wool Growers and Stock Growers Associations. There are also garden clubs, sportsmen groups and a variety of other civic groups which have been contributing to community development efforts in Stillwater County. There are 118 registered nonprofit organizations within Stillwater County according to the Internal

Stillwater County began participation in Economic Development Administration's (EDA) Overall Economic Development Program in 1988 and participated in the formation of the Beartooth RC&D Economic Development District. The Area Plan and Overall Economic Development Program was approved for the five county district in 1995. The County continues work on implementation of suggested projects, monitors economic indicators, participates in regional economic development efforts, and updates economic development plan annually. With the formation of the Beartooth RC&D Development District, it was decided that Stillwater County could utilize the technical assistance through Beartooth RC&D and allow Beartooth RC&D to receive EDA funds. In order for Beartooth RC&D to receive EDA funds they are required to submit a Comprehensive Economic Development Strategy (CEDS) for their five county region including Big Horn, Carbon, Stillwater, Sweet Grass, and Yellowstone. Beartooth RC&D's CEDS is updated annually and used as a strategic planning document for the district.

Stillwater County's Overall Economic Development Plan is not mandated or regulated by either the State of Montana or EDA. The Stillwater County Board of Commissioners request that the OEDP be updated and used as a strategic planning document for economic development efforts throughout the county.

SECTION III THE AREA AND ITS ECONOMY

A. General Description of Area

Located in south central Montana, Stillwater County consists of 1,793 square miles of land area which is 1,151,808 acres. There is a diversity of geographic and topographic features in the area from the Beartooth-Absarokee Wilderness Area at the southern end of the county, to the Stillwater and Yellowstone River Valleys in the central section, to the lake basin, coulees and rolling plains at the northern end. Elevations range from 12,000 feet above sea level near Granite Peak on the southern boundary of Stillwater County to less than 3,400 feet above sea level near Park City in the east central part of the county.

Interstate 90 is the main transportation linkage through the county in both east and west directions. Montana Rail Link's main railroad line parallels Interstate 90 through the county along with old state highway 10. Other major highways include Highway 78 from Columbus to Red Lodge, Highway 306 from Columbus to Rapelje, Highway 419 just south of Absarokee to Nye, Highway 420 from Absarokee to Spring Creek and Highway 421 from Columbus to Joliet. The county seat of Columbus is located 40 miles from Billings, Montana's largest city. 100 miles from Bozeman, home of Montana State University. 496 miles from Spokane, WA, 501 miles from Salt Lake City, UT., 598 miles from Denver, CO., and 852 miles from Minneapolis, MN. The Columbus Airport – Woltermann Memorial is a City-County jointly owned airport located in Columbus and the nearest commercial air service is available at Billings Logan International Airport. United Parcel Service and truck freight delivery are also available throughout the County.

B. Population and Labor Force

The population of Stillwater County was reported to be 9,117 people in the 2010. Federal Decennial Census and the latest official estimate reported a population of 9,131 in 2013. The following tables show the components of population change from 1990 to 2000 and 2000 to 2010. Exhibit 1, on page 12, shows the estimated population through 2013 with projections to 2030.

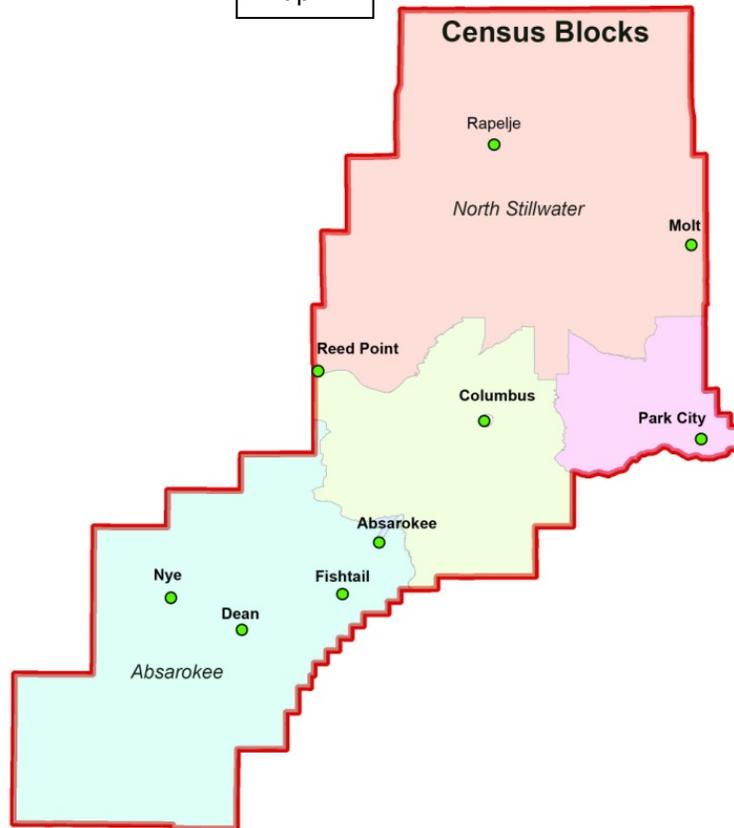
COMPONENTS OF POPULATION CHANGE

| Year | Population Change | | | Residual Change | | | |
|------|-------------------|--------|---------|-----------------|-------|--------|---------|
| | Population | Person | Percent | Birth | Death | Number | Percent |
| 1990 | 6,536 | 938 | 16.8 | 747 | 647 | 840 | 15.0 |
| 2000 | 8,195 | 1,711 | 26.2 | 904 | 860 | 1,613 | 19.7 |
| 2010 | 9,117 | 922 | 11.3 | 1,043 | 891 | 770 | 8.4 |

Sources: U.S. Census Bureau/Census 1990, 2000, and 2010/DP-1: Profile of General Demographics
Montana Department of Commerce, Center for Economic Information
Stillwater County Clerk and Recorder

The median age of the Stillwater County population was 45.7 years in 2010 which was up from 40.8 years in the 2000 Census. The characteristics of the population by age, race and gender are shown on exhibit 2. The distribution of population within the county and population change between 2000 and 2010 is shown on Map 4 and following table. The racial composition of Stillwater County is also shown in the table below. Less than 5% of the population is non-white.

Map 1



POPULATION CHANGE 2000 – 2010

| | <u>2000</u> | <u>2010</u> | <u>% Change</u> |
|------------------|-------------|-------------|-----------------|
| North Stillwater | 762 | 767 | 0.07 |
| Park City | 1809 | 2331 | 28.6 |
| Columbus | 3306 | 3797 | 14.9 |
| Absarokee | 2318 | 2222 | -4.1 |

HOUSE CHANGE 2000 – 2010

| | <u>2000</u> | <u>2010</u> | <u>% Change</u> |
|------------------|-------------|-------------|-----------------|
| North Stillwater | 348 | 406 | 14.3 |
| Park City | 709 | 944 | 24.9 |
| Columbus | 1,491 | 1855 | 19.6 |
| Absarokee | 1,399 | 1598 | 12.5 |

POPULATION BY RACE AND HISPANIC ORIGIN, 1990 TO 2010

| | 2010 | | 2000 | | 1990 | |
|--|---------|-------|---------|-------|---------|-------|
| | Persons | % | Persons | % | Persons | % |
| All Races | 9,117 | 100.0 | 8,195 | 100.0 | 6,536 | 100.0 |
| White | 8,688 | 95.3 | 7,860 | 95.9 | 6,434 | 99.2 |
| Black | 9 | 0.1 | 11 | 0.1 | 5 | 0.1 |
| American Indian & Alaska Native | 54 | 0.6 | 57 | 0.7 | 52 | 0.5 |
| Asian | 28 | 0.3 | 17 | 0.2 | 10 | 0.2 |
| Hispanic | 214 | 2.3 | 165 | 2.1 | 92 | 1.4 |
| Native Hawaiian & other Pacific Islander | 1 | <0.1 | 2 | <0.1 | ----- | ----- |
| Other Race | 123* | 1.3 | 83* | 1 | 35* | 0.5 |

** combined category from census data / estimates have been rounded*

The educational level of adults 18 to 24 years and 25 years and over is shown in the following table are estimates from the Census Bureau's 2008-2012 American Community Survey.

EDUCATIONAL ATTAINMENT OF POPULATIONS 18 TO 24 YEARS AND 25 YEARS AND OLDER

| Educational Attainment: | 18 to 24 Years | | 25 Years and Over | |
|---|----------------|-------|-------------------|-------|
| | Number | % | Number | % |
| TOTAL: | 493 | 100.0 | 6,564 | 100.0 |
| Less than 9 th grade | ----- | ----- | 151 | 2.3 |
| 9 th to 12 th grade, no diploma | ----- | ----- | 374 | 5.7 |
| Less than high school graduate | 100 | 20.3 | ----- | ----- |
| High school graduate (includes GED) | 196 | 39.8 | 2,553 | 38.9 |
| Some college, no degree | ----- | ----- | 1,595 | 24.3 |
| Some college or associate's degree | 189 | 38.3 | ----- | ----- |
| Associate's degree | ----- | ----- | 446 | 6.8 |
| Bachelor's degree or higher | 8 | 1.6 | 1,445 | 22.0 |

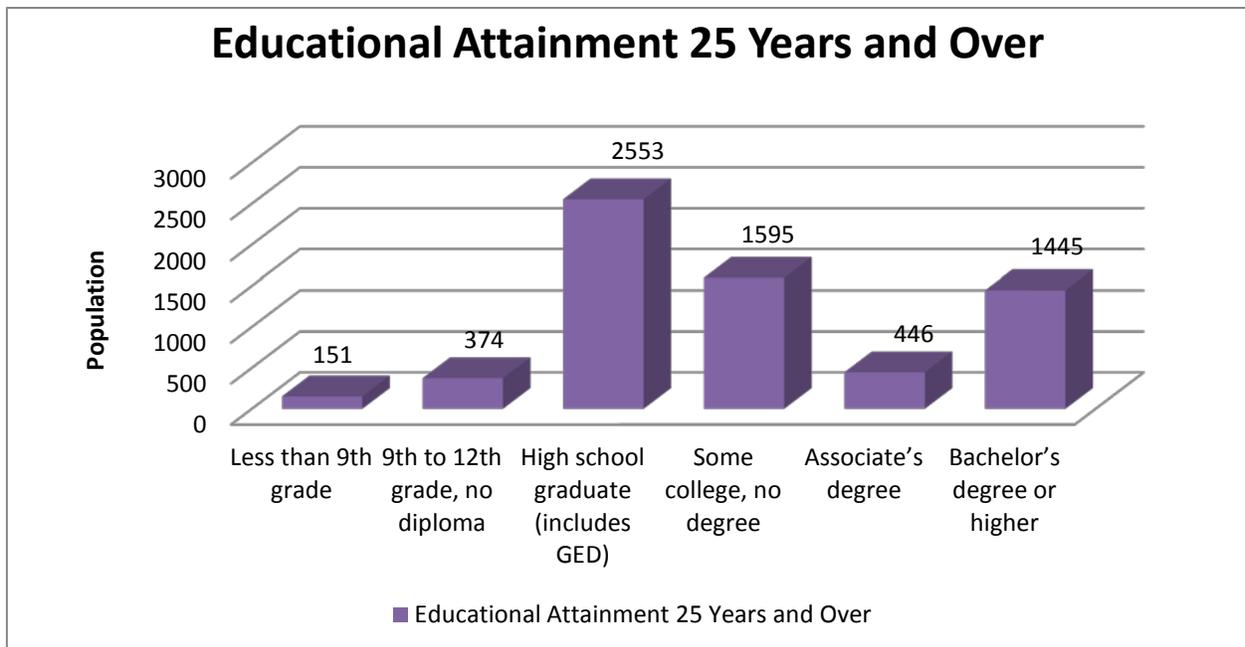


Exhibit 1: Population Estimates

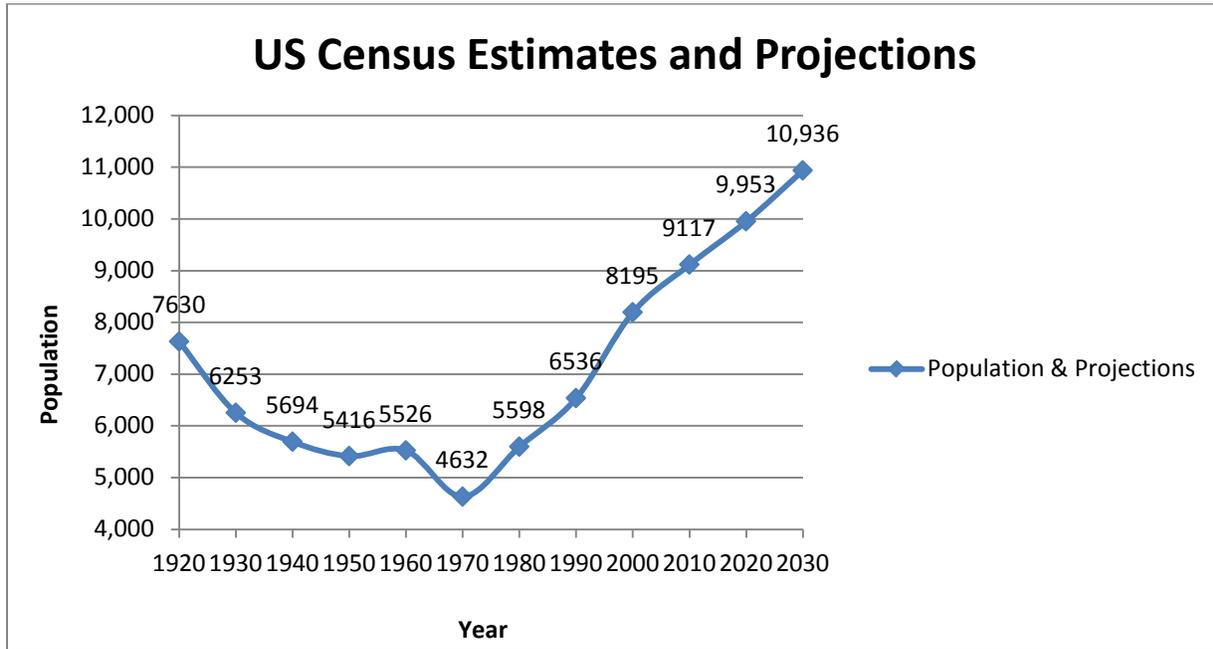


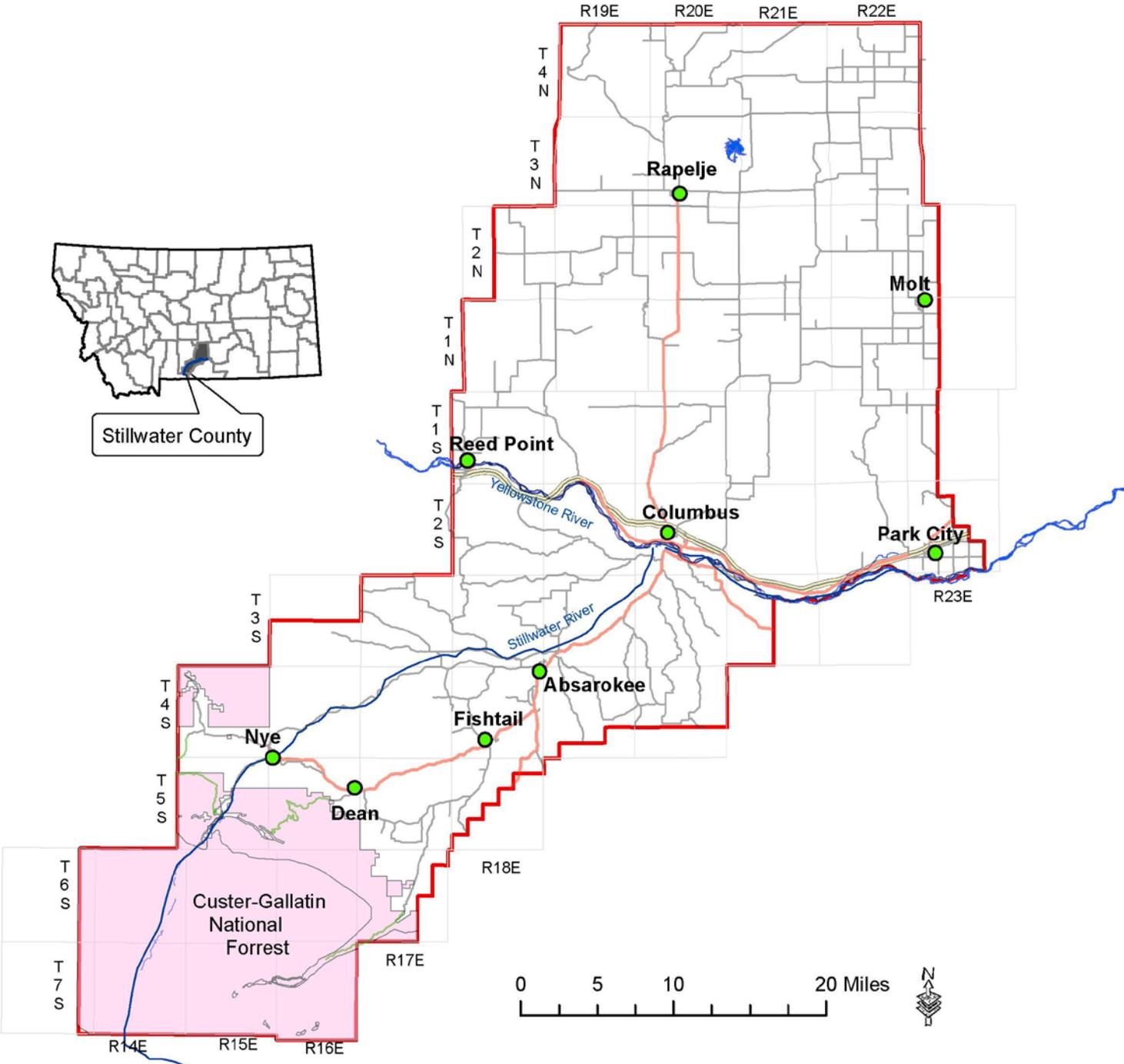
Exhibit 2: Population by age, race, and gender 2000 and 2010

| SEX and AGE | 2000 Census | 2010 Census |
|-------------------------|--------------|--------------|
| Male | 4,178 | 4,674 |
| Female | 4,017 | 4,443 |
| Under 5 years | 448 | 549 |
| 5 to 9 years | 581 | 583 |
| 10 to 14 years | 632 | 564 |
| 15 to 19 years | 587 | 571 |
| 20 to 24 years | 293 | 292 |
| 25 to 34 years | 830 | 864 |
| 35 to 44 years | 1,376 | 1,049 |
| 45 to 54 years | 1,366 | 1,575 |
| 55 to 59 years | 489 | 877 |
| 60 to 64 years | 407 | 698 |
| 65 to 74 years | 646 | 878 |
| 75 to 84 years | 392 | 462 |
| 85 years and over | 148 | 155 |
| Median age (years) | 40.8 | 45.7 |
| 18 years and over | 6,124 | 7,023 |
| Male | 3,104 | 3,550 |
| Female | 3,020 | 3,473 |
| 21 years and over | 5,885 | 6,788 |
| 62 years and over | 1,411 | 1,884 |
| 65 years and over | 1,186 | 1,495 |
| Male | 547 | 737 |
| Female | 639 | 758 |
| Total Population | 8,195 | 9,117 |

Sources: U.S. Census Bureau/Census2000 and 2010/DP-1: Profile of General Demographics

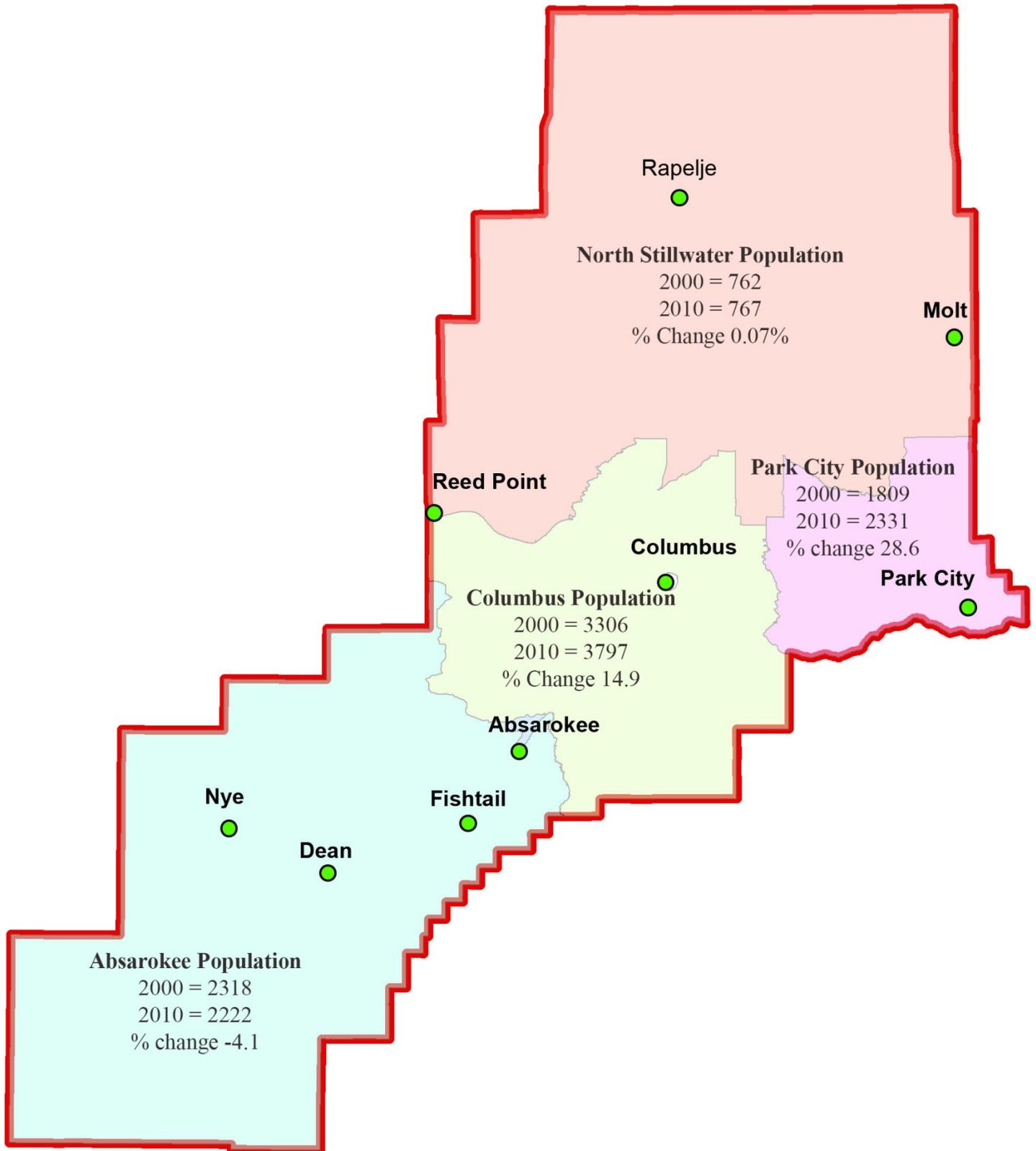
Map 3: Stillwater County with Towns Locations

STILLWATER COUNTY



STILLWATER COUNTY POPULATION CHANGE 2000 – 2010

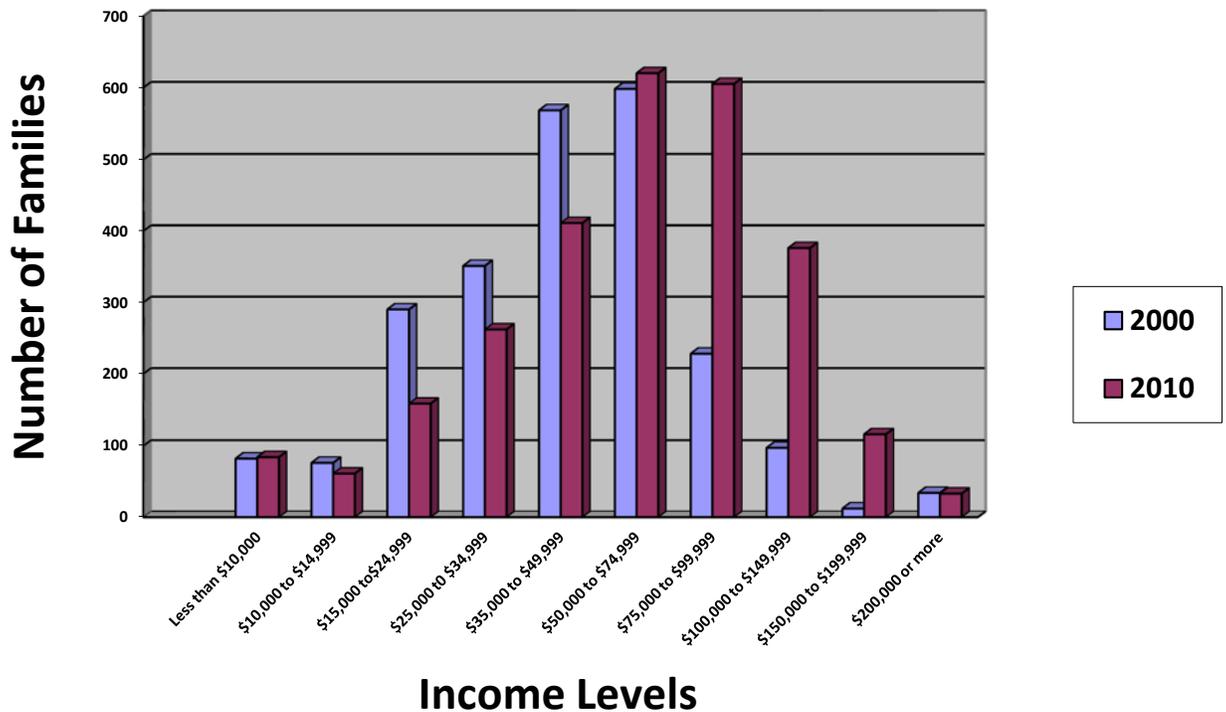
Map 4: Population Change



The median family income was reported to be \$65,438 in 2010. Table below compares family income in 2010 with 2000, median family income has increased \$20,200 in this time.

INCOME OF FAMILIES FOR STILLWATER COUNTY 2010 AND 2000

| | 2010 | | 2000 | |
|------------------------|---------------|----------|---------------|----------|
| | <u>Number</u> | <u>%</u> | <u>Number</u> | <u>%</u> |
| TOTAL FAMILIES | 2,727 | 100.0 | 2,336 | 100.0 |
| Less than \$10,000 | 84 | 3.1 | 82 | 3.5 |
| \$10,000 to \$14,999 | 61 | 2.2 | 76 | 3.3 |
| \$15,000 to \$24,999 | 159 | 5.8 | 290 | 12.4 |
| \$25,000 to \$34,999 | 262 | 9.6 | 351 | 15.0 |
| \$35,000 to \$49,999 | 411 | 15.1 | 568 | 24.3 |
| \$50,000 to \$74,999 | 620 | 22.7 | 598 | 25.6 |
| \$75,000 to \$99,999 | 605 | 22.2 | 228 | 9.8 |
| \$100,000 to \$149,999 | 376 | 13.8 | 97 | 4.2 |
| \$150,000 to \$199,999 | 116 | 4.3 | 12 | 0.5 |
| \$200,000 or more | 33 | 1.2 | 34 | 1.5 |
| MEDIAN FAMILY INCOME | \$65,438 | ---- | \$45,238 | ---- |
| MEAN FAMILY INCOME | \$72,425 | ---- | \$18,468 | ---- |



Sources: U.S. Census Bureau/Census 2000/QT-P32: Population Group Total (SF4)
 U.S. Census Bureau/ACS 2006-2010/B19001: Household Income

The civilian labor force in Stillwater County was reported to be 4,828 in 2010. The table below shows employment status of persons 16 years and older, 2000 and 2010, and compares with state.

EMPLOYMENT STATUS OF PERSONS 16 YEARS AND OLDER, 2000 AND 2010

| | Persons 16 Years & older | In Labor Force | Not in Labor Force | Armed Forces | Employed Persons | Unemployed Persons | Percent of Unemployment |
|-------------------|--------------------------------|-------------------|--------------------------|-----------------|---------------------|-----------------------|----------------------------|
| 2010 | | | | | | | |
| Montana | 778,518 | 509,081 | 257,389 | 3,737 | 467,674 | 28,683 | 4.8 |
| Male | 387,379 | 269,434 | 104,321 | 3,227 | 241,935 | 17,513 | |
| Female | 391,139 | 239,647 | 153,068 | 510 | 225,739 | 11,170 | |
| Stillwater | 7,132 | 4,833 | 2,276 | 5 | 4,640 | 188 | 3.9 |
| Male | 3,656 | 2,727 | 906 | 5 | 2,608 | 114 | |
| Female | 3,476 | 2,106 | 1,370 | 0 | 2,032 | 74 | |
| 2000 | | | | | | | |
| Montana | 701,168 | 458,306 | 242,862 | 3,619 | 425,977 | 28,710 | 4.1 |
| Male | 346,102 | 245,572 | 100,530 | 3,089 | 224,933 | 17,550 | 5.1 |
| Female | 355,066 | 212,734 | 142,332 | 530 | 201,044 | 11,160 | 3.1 |
| Stillwater | 6,399 | 4,192 | 2,207 | 0 | 3,907 | 285 | 4.5 |
| Male | 3,232 | 2,413 | 819 | 0 | 2,202 | 211 | 6.5 |
| Female | 3,167 | 1,779 | 1,388 | 0 | 1,705 | 74 | 2.3 |

Sources: U.S. Census Bureau/QT-P24/110th Congressional District Summary File/Employment Status by Sex, State
 U.S. Census Bureau/QT-P24/110th Congressional District Summary File/Employment Status by Sex, County
 U.S. Census Bureau/B23001/ACS 2006-2010/Sex by Age by Employment For Population 16 Years and Over, State
 U.S. Census Bureau/B23001/Sex by Age by Employment For Population 16 Years and Over, County

The unemployment rate for Stillwater County is compared with the U.S. and Montana annual average unemployment rates for the years 2000 through 2013 in the table below. The Stillwater County unemployment rate has consistently been below the federal and state unemployment rates since 2000. The unemployment rate for Stillwater County in 2013 was 4.6 percent. Information obtained through the Montana Department of Labor and Industry Job Service.

**ANNUAL AVERAGE ESTIMATES OF THE CIVILIAN LABOR FORCE AND
UNEMPLOYMENT RATES 2000 TO 2013**

Stillwater County

| Year | Employed Population | Unemployed Population |
|-------------|--------------------------------|----------------------------------|
| 2013 | 4383 | 210 |
| 2012 | 4267 | 224 |
| 2011 | 4103 | 235 |
| 2010 | 3974 | 252 |
| 2009 | 4182 | 239 |
| 2008 | 4441 | 182 |
| 2007 | 4378 | 136 |
| 2006 | 4309 | 116 |
| 2005 | 4217 | 128 |
| 2004 | 4319 | 147 |
| 2003 | 4174 | 155 |
| 2002 | 4288 | 184 |
| 2001 | 4489 | 172 |
| 2000 | 4223 | 200 |

Comparing unemployment rates for Stillwater County, Montana, and the United States

| Year | Stillwater County % | Montana % | U.S. % |
|-------------|--------------------------------|----------------------|-------------------|
| 2013 | 4.6 | 5.6 | 7.4 |
| 2012 | 5.0 | 6.0 | 8.1 |
| 2011 | 5.4 | 6.5 | 8.9 |
| 2010 | 6.0 | 6.7 | 9.6 |
| 2009 | 5.4 | 6.0 | 9.3 |
| 2008 | 3.9 | 4.5 | 5.8 |
| 2007 | 3.0 | 3.4 | 4.6 |
| 2006 | 2.6 | 3.2 | 4.6 |
| 2005 | 2.9 | 3.6 | 5.1 |
| 2004 | 3.3 | 4.0 | 5.5 |
| 2003 | 3.6 | 4.3 | 6.0 |
| 2002 | 4.1 | 4.5 | 5.8 |
| 2001 | 3.7 | 4.5 | 4.7 |
| 2000 | 4.5 | 4.8 | 4.0 |

The principal labor needs of the area are in agriculture, mining, retail trade, manufacturing, and health care. Expansion in mining activity has caused a greater demand for skilled labor in hard rock mining in Southern Stillwater County near Nye. The nearest vocational training center is in Billings, which is 45 miles away. The Billings Job Service under the Montana Department of Labor and Industry provides outreach representatives to Stillwater County. The Job Service also occupies a satellite office at the Stillwater County Library to assist job seekers.

C. The Economy

Commercial trade, manufacturing, precious metals processing, and tourism are the economic base of the Stillwater County. The top ten private employers reported by the Montana Department of Labor and Industry in 2013 in Stillwater County are:

| Company | Employees |
|--------------------------------|------------------|
| Stillwater Mining Company | 1000+ |
| Montana Silversmiths | 100-249 |
| Town Pump | 50-99 |
| Special K Ranch | 50-99 |
| Columbus IGA Plus | 50-99 |
| Stillwater Billings Clinic | 20-49 |
| Yellowstone Bank | 20-49 |
| Stage FX | 20-49 |
| Beartooth Healthcare Community | 20-49 |
| McDonalds | 20-49 |

There are other numerous commercial businesses in Stillwater County providing a variety of goods and services including cafes, groceries, clothing, motels, dry goods, gas, drug store, post office, hardware, farm supply, floral, barber shop/beauty shops, bars, appliances, machinery, auto and truck sales, auto repair, attorneys, accountants, insurance, real estate, doctors, dentists, gift stores, antiques, liquor, second hand goods, contractors/developers, and other services.

In the table on the following page, you will find the principle economic activities in Stillwater County in terms of the number employed and total personal income that was reported in the American Community Survey five year estimates. The top industries employing Stillwater County residents are agriculture, mining, retail trade, educational services and health care, and construction.

EMPLOMENT BY INDUSTRY AND WAGES 2008-2012 (ACS 5-YEAR ESTIMATES)

| Subject | Stillwater County, Montana | | | | | | | | |
|---|-----------------------------|-------|--------|---------------------------|-----------------|------------------------------------|-----------------|--------------------------------------|-----------------|
| | Number of Employees (Total) | Male | Female | Median earnings (dollars) | Margin of Error | Median earnings (dollars) for male | Margin of Error | Median earnings (dollars) for female | Margin of Error |
| Civilian employed population 16 years and over | 4,500 | 57.5% | 42.5% | 32,005 | +/-1,947 | 45,066 | +/-9,130 | 22,516 | +/-3,017 |
| Agriculture, forestry, fishing and hunting, and mining: | 998 | 87.1% | 12.9% | 51,296 | +/-12,531 | 55,417 | +/-9,900 | 32,132 | +/-12,700 |
| Agriculture, forestry, fishing and hunting | 374 | 84.8% | 15.2% | 26,000 | +/-9,066 | 30,347 | +/-7,688 | 19,375 | +/-13,062 |
| Mining, quarrying, and oil and gas extraction | 624 | 88.5% | 11.5% | 68,929 | +/-9,891 | 71,635 | +/-6,705 | 45,500 | +/-14,675 |
| Construction | 448 | 89.7% | 10.3% | 38,438 | +/-10,176 | 42,656 | +/-13,004 | 30,645 | +/-6,631 |
| Manufacturing | 378 | 59.3% | 40.7% | 34,063 | +/-6,633 | 53,750 | +/-10,552 | 27,500 | +/-6,508 |
| Wholesale trade | 162 | 61.7% | 38.3% | 70,833 | +/-28,915 | 65,000 | +/-18,903 | 87,786 | +/-87,226 |
| Retail trade | 471 | 47.1% | 52.9% | 18,053 | +/-2,191 | 18,382 | +/-8,157 | 17,926 | +/-3,037 |
| Transportation and warehousing, and utilities: | 286 | 74.1% | 25.9% | 41,667 | +/-11,563 | 54,500 | +/-9,919 | 12,500 | +/-6,550 |
| Transportation and warehousing | 247 | 72.1% | 27.9% | 42,768 | +/-13,759 | 57,727 | +/-11,897 | 10,938 | +/-5,540 |
| Utilities | 39 | 87.2% | 12.8% | 31,875 | +/-23,554 | 32,321 | +/-31,007 | - | ** |
| Information | 43 | 51.2% | 48.8% | 35,114 | +/-24,248 | 15,833 | +/-5,231 | 36,477 | +/-1,833 |
| Finance and insurance, and real estate and rental and leasing: | 224 | 32.1% | 67.9% | 25,893 | +/-6,926 | 84,167 | +/-71,059 | 19,732 | +/-5,689 |
| Finance and insurance | 145 | 27.6% | 72.4% | 26,518 | +/-9,092 | 67,500 | +/-47,305 | 23,194 | +/-5,933 |
| Real estate and rental and leasing | 79 | 40.5% | 59.5% | 15,313 | +/-19,874 | 185,682 | +/-223,742 | 14,087 | +/-1,129 |
| Professional, scientific, and management, and administrative and waste management services: | 226 | 48.7% | 51.3% | 28,125 | +/-11,346 | 39,643 | +/-12,178 | 19,167 | +/-13,387 |
| Professional, scientific, and technical services | 117 | 47.9% | 52.1% | 50,625 | +/-12,140 | 51,250 | +/-1,520 | 29,904 | +/-44,081 |
| Management of companies and enterprises | 0 | - | - | - | ** | - | ** | - | ** |
| Administrative and support and waste management services | 109 | 49.5% | 50.5% | 15,703 | +/-9,230 | 17,308 | +/-11,908 | 7,102 | +/-4,254 |
| Educational services, and health care and social assistance: | 784 | 22.1% | 77.9% | 27,318 | +/-5,339 | 41,307 | +/-13,027 | 26,025 | +/-3,617 |
| Educational services | 295 | 33.6% | 66.4% | 28,750 | +/-8,996 | 40,511 | +/-6,771 | 26,161 | +/-2,459 |
| Health care and social assistance | 489 | 15.1% | 84.9% | 26,806 | +/-5,894 | 54,286 | +/-29,410 | 25,852 | +/-6,687 |
| Arts, entertainment, and recreation, and accommodation and food services: | 177 | 27.1% | 72.9% | 12,159 | +/-3,519 | 25,833 | +/-32,568 | 11,932 | +/-3,598 |
| Arts, entertainment, and recreation | 66 | 40.9% | 59.1% | 28,750 | +/-2,651 | 45,625 | +/-21,512 | 28,047 | +/-13,953 |
| Accommodation and food services | 111 | 18.9% | 81.1% | 9,358 | +/-1,996 | 8,523 | +/-2,097 | 9,712 | +/-4,091 |
| Other services, except public administration | 168 | 47.6% | 52.4% | 18,750 | +/-11,190 | 27,414 | +/-10,900 | 8,125 | +/-5,636 |
| Public administration | 135 | 39.3% | 60.7% | 38,438 | +/-15,360 | 59,125 | +/-3,907 | 34,167 | +/-11,348 |

** Data is based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. Percent imputed by industry 8.2 percent.

Source: U.S. Census Bureau/ACS 2008-2012/ S2403: Industry By Sex And Median Earnings In The Past 12 Months (In 2012 Inflation- Adjusted Dollars) For The Civilian Employed Population 16 Years And Over

The total civilian labor force has been steadily increasing since mid 2012. Due to the economic recession of the 2000's, many large companies had to downsize, including Timberweld Manufacturing, Montana Silversmiths, and Stillwater Mining Company. After the recession subsided around 2010 most businesses have begun to ramp up their work force once again. Columbus has seen a spike in small business startups since 2010 and continues to have an incredibly vibrant business community.

Stillwater County has strong economic ties with Billings, which is a major retail and service center for Montana. Many Stillwater County residents are employed in Billings or Laurel, especially Park City residents. Stillwater County residents also find it convenient to shop in Billings due to short distances and a variety of urban amenities. Health care is available in Stillwater County but a variety of highly specialized health care and advanced medical technology is also available in Billings.

Stillwater County has four banks and two Credit Unions, which include two Yellowstone Banks (one in Absarokee and one in Columbus), two United Banks (one in Absarokee and one in Columbus), and a Valley Credit Union and Altana Federal Credit Union both located in Columbus. The Small Business Administration (SBA) and the Small Business Development Center (SBDC) out of Billings does service all of Stillwater County and offers financing assistance, business counseling, and business resources to all small businesses throughout the county.

The 2013 property taxable valuation of Stillwater County was \$36,312,315.76. There was a minimal decrease of approximately \$875,000 in taxable valuation from 2012 to 2013. The following table is a breakdown of the \$36,312,315.76 taxable valuation in 2013 for Stillwater County and for the town of Columbus. Information obtained through the Montana Department of Revenue.

2013 TAXABLE VALUATION

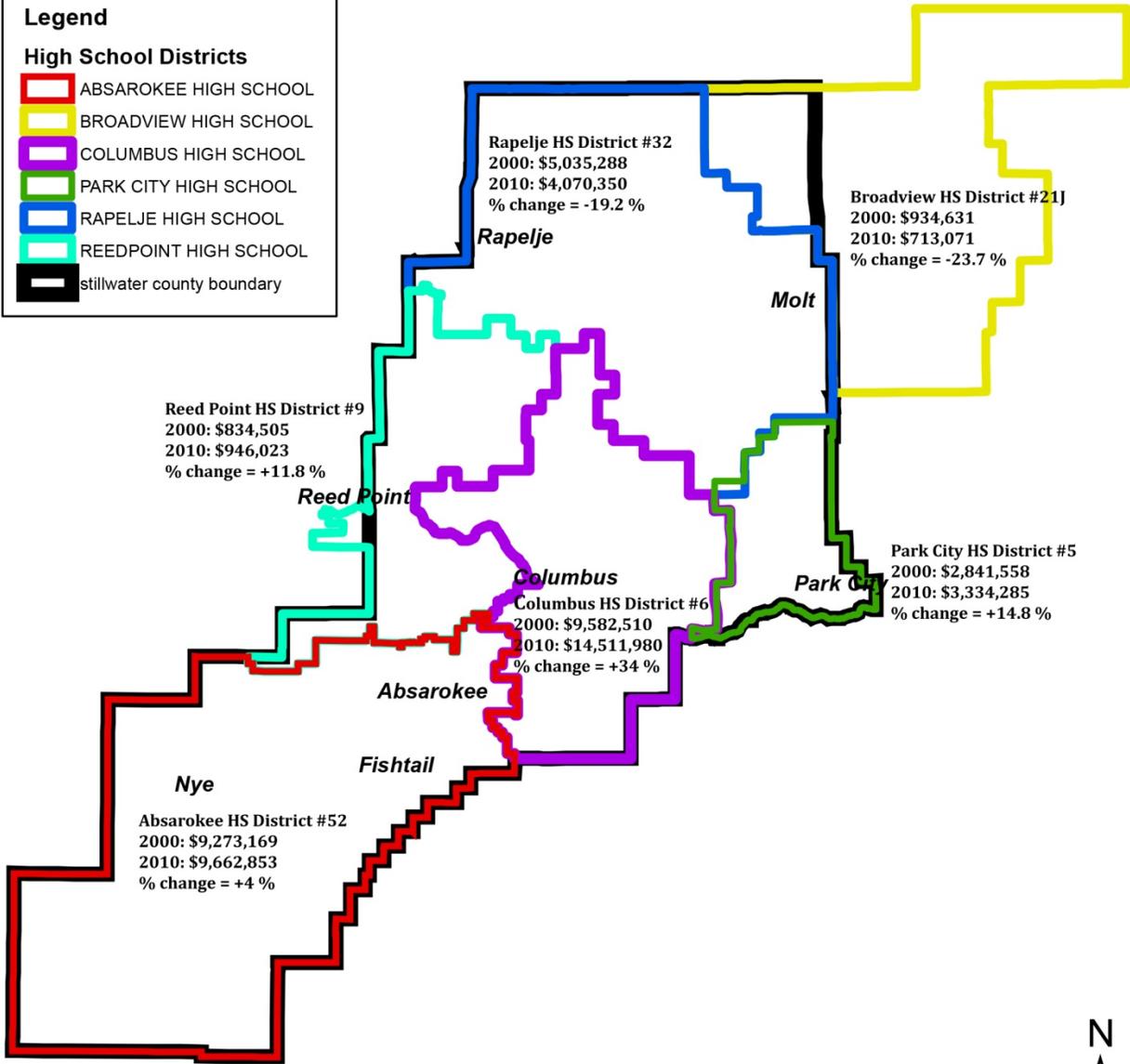
| | Stillwater County | Stillwater County | Columbus | Columbus |
|--|---------------------|----------------------|---------------------|----------------------|
| | <i>Market Value</i> | <i>Taxable Value</i> | <i>Market Value</i> | <i>Taxable Value</i> |
| Agricultural | 198,897,093.00 | 3,876,231.00 | 181,049.00 | 3,621.00 |
| Residential | 607,534,119.00 | 7,903,148.00 | 95,809,492.00 | 1,244,043.00 |
| Commercial | 59,619,049.01 | 1,195,083.00 | 29,587,631.60 | 578,088.60 |
| Industrial | 37,696,809.00 | 501,304.57 | 22,680,061.40 | 441,087.31 |
| Rail Road | 15,336,272.00 | 519,901.00 | 360,823.00 | 12,232.00 |
| Mining-Gross Proceeds | 275,653,448.00 | 8,269,603.89 | 55,130,689.60 | 1,653,920.69 |
| Equipment, Land & Buildings | 6,236,321.01 | 124,726.97 | 1,293,190.80 | 25,863.19 |
| Utilities | 81,491,776.00 | 5,382,651.00 | 6,081,598.00 | 597,036.00 |
| Oil and Gas | 28,264,501.00 | 2,946,550.00 | 0.00 | 0.00 |
| Other Personal Property | 292,393,079.05 | 5,593,116.33 | 111,607,206.60 | 2,736,992.06 |
| | | | | |
| Total | 1,603,122,467.07 | 36,312,315.76 | 322,731,742.00 | 7,292,883.85 |

Stillwater County

Legend

High School Districts

- ABSAROKEE HIGH SCHOOL
- BROADVIEW HIGH SCHOOL
- COLUMBUS HIGH SCHOOL
- PARK CITY HIGH SCHOOL
- RAPELJE HIGH SCHOOL
- REEDPOINT HIGH SCHOOL
- stillwater county boundary



High School Districts



Stillwater County GIS
2015
Not a survey-grade Map

Source: Montana Department of Revenue

(6) The total debt level is restricted to 2.5 percent of the assessed market value by Montana Code Annotated 7-7-2101. Stillwater County’s 2014 market value is \$778,868,237 making Stillwater County’s debt limit \$19,471,705. The market value of the town is \$176,338,594 setting the Town’s debt limit \$4,408,464.

Stillwater County and the Town of Columbus have no general obligation bonds outstanding at this time. Therefore, both the Town and County have their full legal bonding capacity available to them.

D. COMMUNITY FACILITIES AND SERVICES

Housing

Total number of housing units in Stillwater County is 4,768 units with 3,758 units occupied and 1,010 vacant. The average house hold size in Stillwater County is 2.38 occupants. Of 3,758 occupied housing units throughout the county, 78 percent are owner-occupied and 22 percent are renter-occupied. The median monthly mortgage rate is \$1,285 and the median gross rate for renters is \$698 per month. The table below shows the year in which housing structures were built in Stillwater County. Total housing units consists of one room units to nine or more room units.

| Year Structure Built | Estimates |
|-----------------------------|------------------|
| Total housing units | 4,768 |
| Built 2010 to 2012 | 16 |
| Built 2000 to 2009 | 852 |
| Built 1990 to 1999 | 808 |
| Built 1980 to 1989 | 572 |
| Built 1970 to 1979 | 657 |
| Built 1960 to 1969 | 214 |
| Built 1950 to 1959 | 289 |
| Built 1940 to 1949 | 363 |
| Built 1939 or earlier | 997 |

Source: U.S. Census Bureau: DP04: Selected Housing Characteristics/2008-2012 ACS 5-Year Estimates

Water Supply

Absarokee, Columbus and Rapelje presently have central water systems. About 1480 people or a little over 16 percent of the County's population is being served by the community water systems. The remaining people are served by individual water systems such as wells, springs, or cisterns.

Absarokee formed a Water and Sewer District in 1996 which replaced former private Water Users Association. Water supply and treatment has been provided since 1954. Absarokee receives its water supply from a series of four active wells. The wells are drilled through a sandstone formation and vary in depth from 40 ft. to 110 feet deep. The existing system of wells is capable of pumping 340,000 gallons per day in the winter months and up to 840,000 gallons during the summer. There is a maximum of 400,000 gallons of storage for treated water in two storage tanks. The original 125,000 gallon concrete storage tank was taken out of service in 2013. A 200,000 gallon tank was built in 1981 and another 200,000 gallon was constructed in 2013. The water distribution system consists of a series of 4 and 6 inch wrapped steel lines and 6" to 8" PVC (placed since 1998). The steel lines (comprising 30-40

percent of the system) are leaking and have limited capacity for fire protection purposes. The primary need is to replace the smaller water mains with larger PVC pipe and repair the leaks in the distribution system.

The existing water supply for the Town of Columbus is obtained from three sources, an infiltration gallery, and production and horizontal wells. The infiltration gallery supply is located on an island area in the Yellowstone River south of the old town shop located on Clough Avenue. The production wells are located on the west edge of Columbus in the Beartooth Heights Subdivision and in Heritage Park in central Columbus.

The gallery lines for the infiltration system are constructed radially from the pump house wetwell. Water is pumped from the gallery with two vertical turbine pumps. The maximum sustained yield of the infiltration gallery water supply is directly affected by the water level in the Yellowstone River. The infiltration gallery facility and equipment is well maintained and in satisfactory condition.

The production well in the Beartooth Heights Subdivision was constructed in 1986 and has a capacity of 400 gpm. The well and pump house facility is in good condition and satisfactorily maintained. The Heritage Park Well came online in 2010 and has a capacity of approximately 350 gpm. Although disinfection of both water supplies is not required, gas chlorination is provided for both sources in order to maintain chlorine residual throughout the distribution and storage facilities.

Existing water storage for the Town of Columbus consists of one storage tank located on the hills north of I-90. The reservoir has a total storage volume of 1million gallons. The present level of storage is adequate for Columbus for the current condition and for the projected future development.

The most recent improvements to the Columbus water system were the replacement and installation of over 9,000 feet of water lines in varying sizes around town costing approximately \$1.6 million and were completed in 2012.

Rapelje obtains its water supply from a developed spring south of town. Two submersible pumps along with a series of 3 pressure tanks to provide "on demand" pressure in the water system currently furnish water directly to the 40-50 water users in Rapelje. The water in the Rapelje area is very hard primarily due to the presence of calcium carbonates so chlorine is added. The distribution system of 1 to 2 inch diameter lines directly to user's lines seems to be adequate for the town at this time. The Rapelje Water System changed over to a Water and Sewer District in 2010 which replace their previous Water Users Association. In order to become a Water and Sewer District, the Montana Department of Environmental Quality required that all water users install a reverse osmosis system which was completed prior to 2010. The recent upgrade to their water system included improving the pumping capacity.

Sewer Systems

Absarokee, Columbus, Reed Point and Park City currently have public sewer systems. Over 3600 people, approximately 40 percent of the County's population is being served by these community sewer systems. The remaining people are served by individual septic systems.

The Absarokee sewer system is managed by Stillwater County through two rural special improvement districts (RSID #5 and #7). The existing system is an aerated 3 cell lagoon system of only 1.46 acres. Secondary treatment is also provided at this facility through an ultra-violet light system and seven aerators. This treatment system was recently upgraded in 1986-1988 and is designed to serve a population of up to 1200 people. The sewage collection system was constructed in 1954 with additions in 1964, with major improvements in 1978 and more set for 2015-2016. Asbestos cement, clay tile and pvc pipe are all found in the collection system. The primary need at this time is to replace old sewer mains as needed and to acquire additional land for future expansion of the sewage treatment system. A preliminary Engineering Report update for the Absarokee sewer system will occur in 2015.

The Columbus municipal sewer system was initially constructed around 1940 with a four cell facultative lagoon treatment system constructed around 1960. A new aerated Wastewater Treatment Facility was constructed in 2000 and is designed for a population of 2,500 with room for expansion. The new treatment facility consists of three aerated cells which are made up of two primary cells and one secondary cell. Between the months of April and October the effluent is utilized for spray irrigation on to the golf course which is adjacent to the facility. The effluent to the golf course is run through an Ultra Violet treatment system. Funding for the new wastewater facility was obtained through a loan from USDA Rural Development.

The Park City sewage collection and treatment system was constructed in 1968. This sewer system is managed by the Park City Water and Sewer District. The system provides service for all areas of town with a network of eight inch sewer mains with two lift stations. The collection system in Park City contains a variety of pipe including clay, asbestos cement, and pvc. The sewage treatment system consists of a three cell five acre lagoon. The district owns sufficient land to develop a fourth cell and currently has sufficient capacity. A facility improvement was completed in 2002.

The Reed Point Water and Sewer District was formed in late 1992. The district constructed a sewer system in 1995 with federal and state grants and loans. Sewer facilities include 8 inch, gravity flow collection system of pvc pipe, which flows into a dual pump lift station. Effluent is pumped to a two cell facultative treatment pond equipped with aerators. The two lagoon cells are three acres in size, poly lined, and non discharging. Treated effluent is discharged by center pivot spray irrigation on an adjacent hay field. The hay field is privately owned, but the district has an 18 acre irrigation easement.

Solid Waste

Stillwater County formed a refuse district in 1975. The district is governed by an appointed board of directors. Board members are appointed to three year terms by the Board of County Commissioners. The district changed from 64 unattended collection sites throughout the county to nine collection sites, 7 which are staffed. (see map) located south of Absarokee, north of Nye, west of Park City, west of Reed Point, west of Columbus, east of Rapelje, west of Broadview, east of Molt, and south of Molt.

The district operates a collection system that utilizes stationary compactors which compacts garbage into 40 cubic yard receiver boxes which are located at 5 and soon to be 6 solid waste collection sites. The solid waste sites which collect loose garbage, either in 28 or 40 cubic yard containers, are then brought to the Stillwater County Transfer Station located west of Columbus. The garbage is then

dumped onto the tipping floor of the transfer station and then pushed into a 6 cubic yard stationary compactor by a skid steer then compacted into a receiving container.

Once the compaction receivers are full, the District utilizes one of their 3 hook lift trucks to go to the collection sites to exchange the full receiver container for an empty container. The full container is then transported via hook lift truck to the City of Billings Regional Landfill located in Billings, MT.

Stillwater County Solid Waste District currently pays the City of Billings Regional Landfill \$20.40 per ton to dispose of the County's garbage. Approximately 3,845 tons of garbage were delivered to the Billings Landfill during fiscal year 2013-2014.

Every household in the district, which includes all of Stillwater County minus the Town of Columbus, is charged \$146.00 per year to utilize the system. Out of district residents may also utilize the system by purchasing an out of district permit for \$146.00 per year.

Recyclables are collected at all staffed collection sites and taken to Pacific Recycling in Billings, Mt. Recyclables collected include cardboard, aluminum, metal, newspaper, magazines, and used oil.

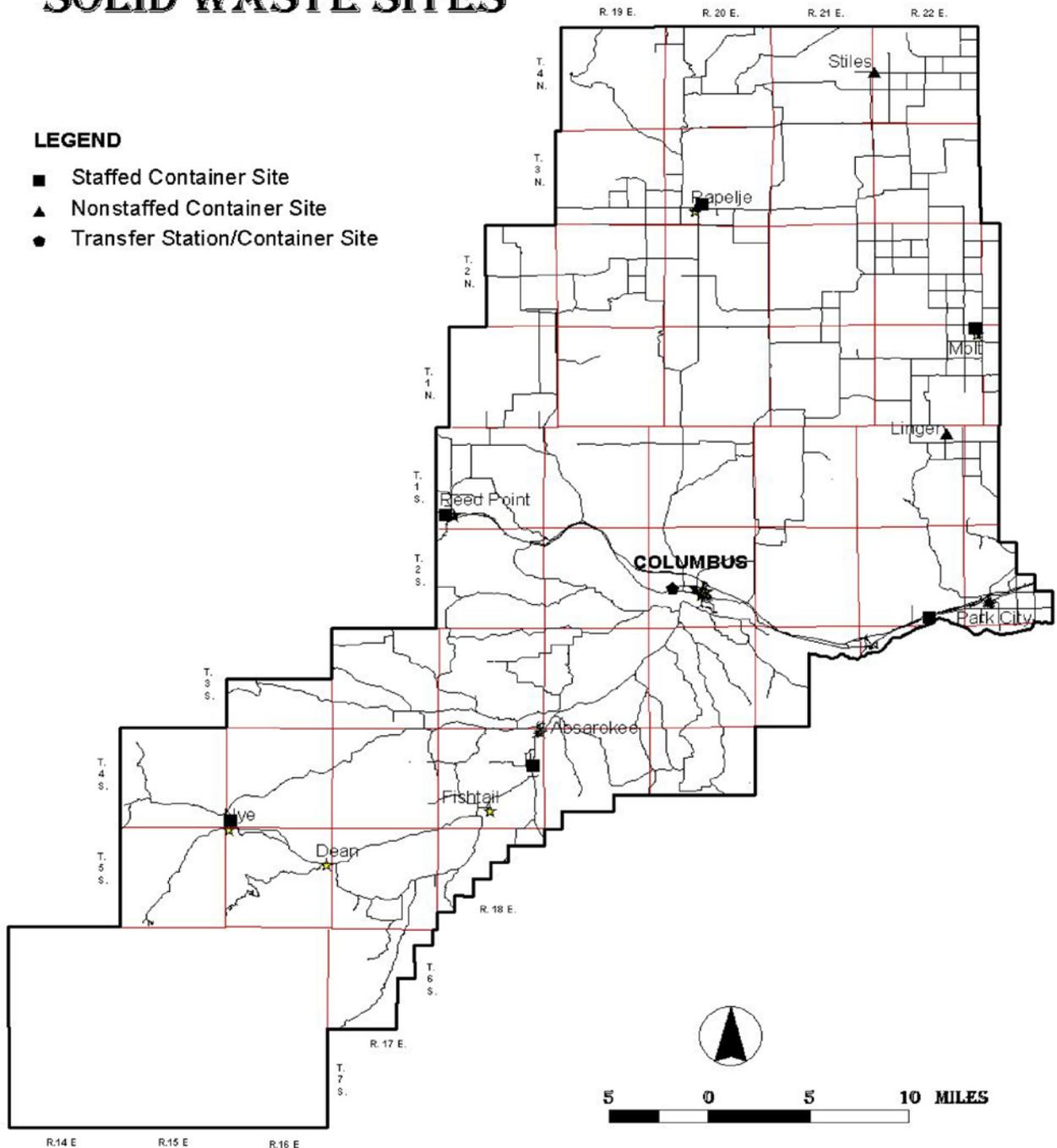
The district employs a Solid Waste Supervisor, 1 part time Administrative Support, 1 full time driver, 1 part time driver, 7 part time site attendants, and 3 roving site attendants.

Solid Waste locations can be identified on the following page included in the Stillwater County Solid Waste Sites map.

STILLWATER COUNTY SOLID WASTE SITES

LEGEND

- Staffed Container Site
- ▲ Nonstaffed Container Site
- Transfer Station/Container Site



E. Transportation Facilities and Services

Highways and Roads

Interstate 90 is the main east-west route through Stillwater County. This four lane divided highway was completed in 1973. The towns of Columbus, Park City and Reed Point are located along I-90. Each of these communities is served by an interchange. There is also another interchange 8 miles west of Columbus, which is called the Springtime Interchange and a Ranch access between Springtime and Reed Point. These interchange locations provide opportunities for commercial development. The average daily traffic on Interstate 90 is approximately 8,710.

Old U.S. 10 is also an east-west route between Park City and the Springtime Interchange. This highway now serves as a frontage road to I-90 and a minor collector to central Stillwater County. Old U.S. 10 is maintained by the Montana Department of Transportation (MDT) and is the main street (Pike Avenue) for the Columbus Business District. This route parallels the Yellowstone River and has historical and scenic features as the original Yellowstone route. Old U.S. 10 is a two lane paved road. Average daily traffic has been as high as 4,360 in the Town of Columbus. MDT took over maintaining all of Stillwater County's secondary roads in 2000.

Highway 78, between Columbus and Red Lodge, is a primary highway maintained by MDT. This is a paved two lane road which serves as the arterial north-south route in southern Stillwater County. This highway serves as the main street for the Absarokee business district. Reconstruction of the route from Columbus to Absarokee was completed in 2014 and the route from Absarokee to 5 miles north of Roscoe is currently being reconstructed and is set to be finished in 2015. The average daily traffic on this route ranges between 3,730 and 6,360.

Highway 302, a 1.4 mile section between Billings and Molt, is a federal aid secondary maintained by the MDT. This is a paved two lane road which serves as a major collector for the Molt area.

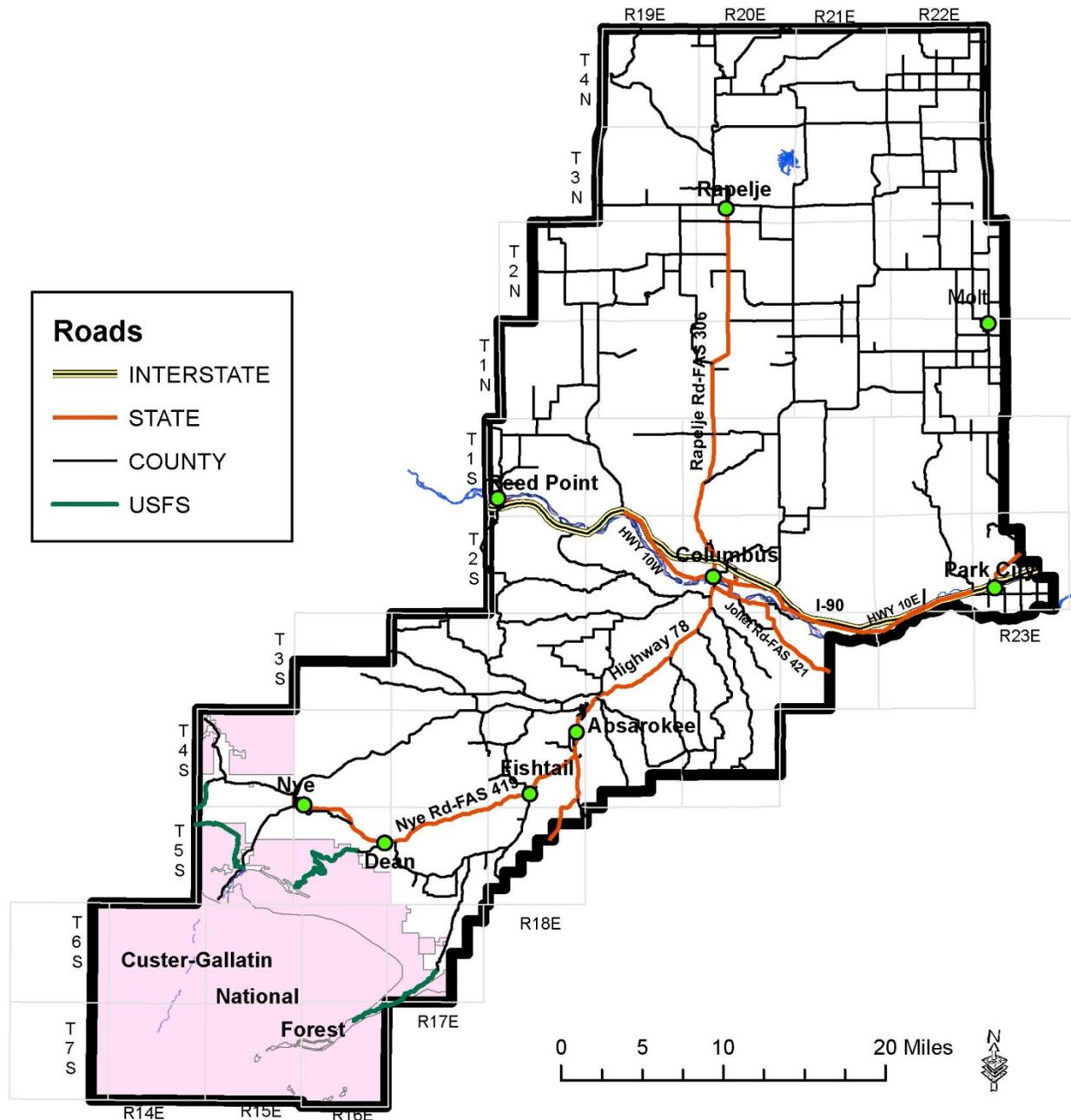
Highway 306, between Columbus and Rapelje, is a federal aid secondary maintained by the MDT. This is a paved two lane road. Highway 306 serves as a major north-south collector for northern Stillwater County.

Highway 419, between the junction with Highway 78 south of Absarokee and Nye is a federal aid secondary route. This section of highway is approximately 28 miles long and extends beyond the Stillwater Mine in Nye. This highway is a paved two lane road that was reconstructed in 2005 and is in a good condition. This is one of two east-west major collectors in southern Stillwater County which accesses the mining region. This route also serves as main street for Fishtail, Dean and Nye.

Highway 420 is the other east-west major collector in Southern Stillwater County. The 7 seven miles of this route west of Absarokee are paved two lane and the remaining 12 miles have a gravel surface which is maintained by MDT. This route is becoming increasingly important as access to the mining region is southern Stillwater County.

Highway 421, between Columbus and Joliet, is a secondary road which the MDT maintains. This is a major collector in east-central Stillwater County.

In addition to Interstate 90 and State Highway 78 (a arterial route), there are several routes classified as collectors and numerous local roads. Stillwater County maintains a total of approximately 1,000 miles of public road. Including approximately 100 miles are paved and the remaining 900 miles are gravel or dirt. In addition, there are 31 major bridge structures in the county. 20 of those bridges are State inspected and the remaining 11 are County inspected bridges. The county road budget allows for a basic maintenance program only and is insufficient to undertake any major reconstruction projects without federal, state, or private assistance. The limitations of the transportation system are an impediment to growth and commerce.

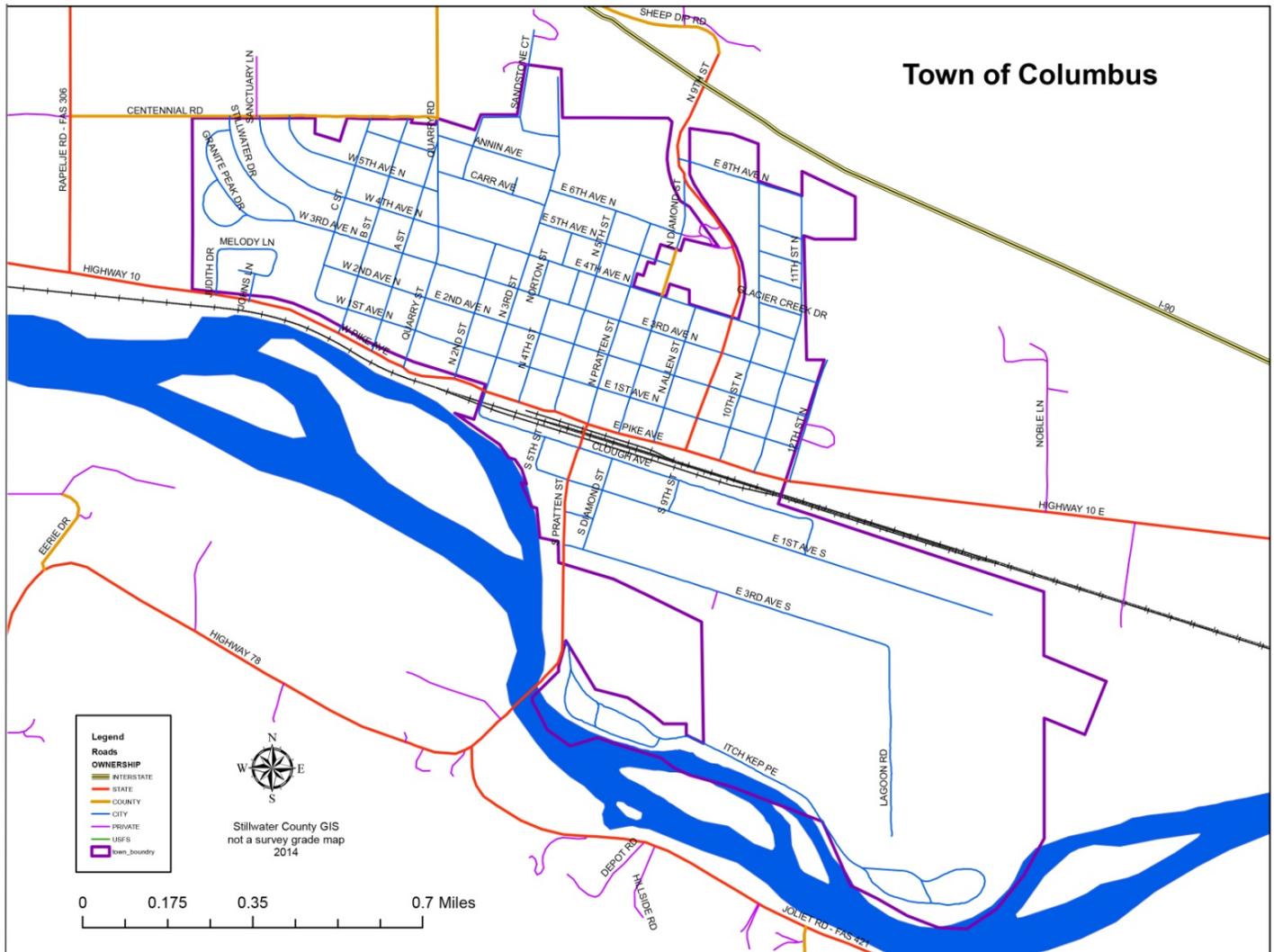


The following information is from the Montana Department of Transportation's 5-year Road Plan for District 5, Billings area which includes Columbus and all of Stillwater County. This is a list of road improvements occurring within Stillwater County in the next 5 years.

| Fiscal Year | Project Name | Project Scope | Location | Project Length | Est. Cost (\$Million) |
|--------------------|---------------------------------|------------------------------|-----------------|-----------------------|------------------------------|
| 2014 | I-90 Bridger Decks (MP 415-431) | Bridge Decks | I-90 | 16.02 | >5 |
| 2014 | Pike Ave Path – Columbus | Bike / Pedestrian Facilities | S-306 | 0.62 | <1 |
| 2015 | Springtime INT- E&W | Safety | I-90 | 20.04 | <1 |
| 2015 | Columbus to Big Timber | Mill & Fill | I-90 | 39.33 | >5 |
| 2015 | 5 Miles North of Roscoe – North | Reconstruction | MT-78 | 1.70 | >5 |
| 2015 | Columbus Sidewalks | Sidewalks | MT-78, S-306 | 0.36 | <1 |
| 2016 | Sign IMP-Fishtail | Signage - New | S-419 | 0.45 | <1 |
| 2017 | Columbus Rest Area | Rest Area | I-90 | 0.00 | >5 |

Town Streets

The Town of Columbus has over 16 miles of streets. 14 miles are paved and 2 miles are a gravel surface. There are also almost 6 miles of alleys in Columbus. The Town is in a similar situation as the county with limited funds for maintenance only. Therefore, major street improvement projects are only possible if additional funding becomes available.



Rail Service

Montana Rail Link operates the rail system through Stillwater County. The main rail line parallels the Yellowstone River east-west through the county and communities of Columbus, Park City and Reed Point. Due to the increase of coal production in Montana and the Bakken oil boom in the late 2000's, Stillwater County sees on average 17.8 Montana Rail Link trains and 2 local trains passing through the county daily according to Montana Rail Link. Passenger rail services were discontinued in Stillwater County in the 1980's.

Bus Service

Bus services are offered through Jefferson Lines and currently there are no stops in Stillwater County. The closest bus stops are in Billings and in Livingston.

Airport Facilities

The only public airport facility in Stillwater County is located in Columbus with administration from a five member Joint City-County Airport Board that serves in an advisory capacity to the Town of Columbus and the Stillwater County Board of Commissioners. According to FAA, the airport was in operation and first inspected March 24, 1953. The airport in 1953 consisted of an unlighted 2,600 foot by 50 foot gravel strip, six hangars and a wind cone. The airport remained essentially the same until 1961, when a 2,800 foot by 55 foot runway and connecting taxiway were paved. The airport undertook a major renovation in 1998, and completed a taxiway extension in 2002 making the runway 3,800 feet by 75 feet. In 2010 the airport was renamed Columbus Airport – Woltermann Memorial. A new 9 foot tall wildlife deterrent fence around the airport was completed in 2010. The Columbus airport is classified as a General Aviation (GA) Airport. The existing airport is basically limited to single engine aircraft. Funding for airport improvements consists of ninety percent by the Federal Aviation Administration and ten percent by the sponsors, which are the Town and County. Another funding source is the Montana Department of Transportation’s Aeronautics Division with their Grant/Loan Program. The 5-year Capital Improvements Plan consists of rehabilitating the runways, taxiways and aprons in 2015 through 2016, acquire land for development in 2018, and pavement maintenance in 2020.

F. Educational Institution

Stillwater County has five high school districts and eight elementary school districts. There are currently 493 high school students enrolled in the 2013-2014 school year and 844 elementary school students enrolled in the Stillwater County Public School System. In addition to public school enrollment, there were 30 home-schooled children in Stillwater County for the 2013-2014 school year. All of the school information was collected from the different school district superintendents.

Information on Area Schools

| <u>High Schools</u> | <u>Yr. Built</u> | <u>Classrooms</u> | <u>Bonds</u> | <u>Students</u> | <u>Teacher</u> |
|---------------------|------------------|-------------------|--------------|-----------------|----------------|
| Absarokee | 1990 | 16 | \$0 | 128 | 13 |
| Columbus | 1968, 1989, 1998 | 17 | \$650,000 | 194 | 19 |
| Park City | 1977 | 10 | -0- | 133 | 10 |
| Rapelje | 1920 | 13 | -0- | 17 | 12 |
| Reed Point | 1919 | 9 | \$422,500 | 21 | 8 |

| <u>Elementary Schools</u> | | | | | |
|---------------------------|---------------------|----|-----------|-----|---------------|
| Absarokee | 1910, 1921 | 13 | \$0 | 120 | 9 |
| Columbus | 1918, 26,60,70,89 | 28 | \$610,000 | 490 | 30 |
| Fishtail | 1946 | 2 | -0- | 2 | 1 |
| Molt | 1960 | 1 | -0- | 4 | 1 |
| Nye | 1932, 1988 | 1 | -0- | 5 | 1 |
| Park City | 1968 | 20 | -0- | 151 | 20 |
| Rapelje | 1920 combined w/ HS | | -0- | 33 | combined w/HS |
| Reed Point | 1917, 1992 | 3 | \$387,500 | 39 | 3 |

Most of the School Districts also provide bus service as described in the table below.

| <u>School Districts</u> | <u>Mi. of Bus Route</u> | <u>No. Of Bus Students</u> |
|-------------------------|-------------------------|----------------------------|
| Absarokee | 222 | 80 |
| Columbus | 440 | 220 |
| Fishtail | 55 | 11 |
| Park City | 140 | 125 |
| Reed Point | 302 | 36 |
| Rapelje | 213.8 | 18 |

G. Industrial Parks and Major Sites

The Town of Columbus currently owns two and a half blocks in the industrial park in Columbus that is located along the Montana Rail Link Railroad. The Town sold two lots to Stillwater Mining Company (SMC) in 1998 and another two and a half lots in 2007. SMC currently owns seven and a half lots in the Columbus industrial park which houses their smelter and refinery operations. Natural gas and electrical, plus water, sewer, and street improvements were extended to the industrial sites in 1990. Railroad siding is a definite asset and there is also an airstrip immediately south of the industrial sites. The Mouat EPA superfund site was an impediment to development in this area in the 1990's but was decommissioned and deemed clean in 2010. The Town of Columbus owns this property and built their new Public Works building directly east of this site. Development has not yet occurred on the old superfund site at this time. Stillwater County has sixty one recognized petroleum release sites with approximately a dozen of those sites being in Columbus. The Montana Department of Environmental Quality continually monitors all the petroleum sites throughout the county. Most of the sites are located in prime business locations and have active operating businesses on those sites.

Other than the Town of Columbus Zoning District, no other areas in Stillwater County are zoned. Therefore, the opportunity for industrial development is not currently restricted by the County. The most desirable locations would be along the paved highways and the Montana Rail Link Rail Road. This rail line passes through Park City, Reed Point, and Columbus. Another area for future development would be on Highway 306 (Rapelje Road) where an Interstate 90 interchange had been proposed.

H. Hospitals and Clinics

Stillwater Hospital Association was formed in 1914. The Association operated the Stillwater Community Hospital in a two story brick building through both good and challenging times into the 1940's. A new brick building was constructed and served as home to Stillwater Community Hospital until 2012 when Stillwater Hospital Association membership base changed to one sole member, Billings Clinic, and a new state of the art facility was constructed in Columbus in 2012. The facilities of Stillwater Billings Clinic now exist on the new campus at 710 N. 11th Street. Stillwater Billings Clinic is a rural integrated health care organization. This integrated facility brings together a physician clinic and hospital services to deliver quality coordinated care that is convenient for our patients. Our board-certified family practice physicians and professional staff provide quality care for the entire family. The

new facility (opened September 2012) is located on 21 acres just off Interstate 90. It houses medical, surgical, and swing beds, a physician clinic; expanded emergency and therapy departments, cardiac rehabilitation, radiology and laboratory services.

The St. Vincent's Medical Clinic in Absarokee provides urgent care, outpatient medicine, x-ray and lab services. The clinic is currently served by one physician, one RN, a technician, and clerical staff. Their new facility was built around the year 2000.

There are two dental clinics in Columbus and one in Absarokee. These offices are assisted by hygienists and dental assistants. There are also one optometrist in Columbus and two chiropractors.

Emergency medical services include three ambulance services located in Absarokee, Columbus, and Park City. These are volunteer ambulance services with EMT's on each crew. Ambulance service is dispatched through the Sheriff's Department or directly when possible and the ambulance crews also carry page beepers with them.

I. Fire Protection

Fire control in Stillwater County is handled through a combination of rural fire districts and fire departments. All the departments and districts operate with volunteer firefighters.

According to state law, the county commissioners in each county must provide for the organization of volunteer rural fire control crews; appoint a county rural fire chief and district rural fire chiefs as necessary and cooperate with federal and state fire protection agencies. In Stillwater County, there are four rural fire districts and three volunteer fire departments. The Town of Columbus also has a volunteer fire department. The volunteers from each area meet for rural fire council meetings as needed, but at least quarterly.

A rural fire district is a legally-recognized entity formed by the county commissioners following a petition, hearing and resolution process outlined in 7-33-2101-3, MCA. Once a fire district is formed, property within the district boundary is taxed to raise funds for fire control. In areas of the county where volunteer fire departments operate, no direct tax assessment is levied on property owners, but these departments do receive a proportionate share of a countywide levy established for fire control purposes. The areas with fire departments rely largely on donations for funding.

The four fire districts in the county are Absarokee, Broadview, Columbus, and Park City. The Broadview district includes an area in four counties. The vast majority of the calls received from Broadview fire district are responded to by the Billings or Laurel Fire Departments. In addition there are three volunteer fire departments or companies that include the Molt Fire Department, the Nye Company, and the Rapelje Company. The following is a brief sketch of each fire districts, department, and companies.

Absarokee Rural Fire District

The Absarokee Rural Fire District was formed between 1954 and 1955. The Absarokee fire hall is located on leased land. One lot behind the existing fire hall is owned by the district. The district responds to approximately 20-30 calls each year, and has a total annual budget of approximately \$60,000.

Nye Company

The Nye Company of the Absarokee Rural Fire District was formed in the early 1970's. The Fire Hall in Nye is located on land donated to the county under the condition that it be exclusively used for fire control.

Columbus Rural Fire District

The Columbus Rural Fire District was formed in August, 1990. The District jointly owns both the Fire Station and the ground it sits on with the Town of Columbus. In 2011 the Reed Point Volunteer Fire Department petitioned to join with the Columbus Fire Rescue Department and at that time the District gained full ownership of the land and the Fire Station in Reed Point. The volunteers respond to approximately 650 calls a year and the District budget is approximately \$800,000 per year which includes grants.

Molt Volunteer Fire Department

The Molt Volunteer Fire Department was formed in 1980 and has a 40 foot by 50 foot concrete wall building with a 20 by 50 addition under construction. The fire hall sits on four lots. The Molt Fire Department also owns the Community Hall in Molt. The Department has an annual budget of approximately \$10,000 and responds to approximately 10-12 calls in a typical year.

Park City Rural Fire District

The Park City Rural Fire District was formed in 1956 and has a fire hall on three Park City lots. The Park City Rural Fire District responds to around 125-130 calls a year and has an annual budget of \$130,000.

Rapelje Company

The Rapelje fire hall is located on two lots in Rapelje. The department responds to between five and ten calls annually and has a budget of about \$3,000. The goals of the department are to own all the trucks they operate and update the Ford fire truck.

There are Mutual Aid agreements among the departments and districts. Stillwater County and the Montana Division of Forestry also have a cooperative equipment agreement. Local fire protection resources are adequate to handle most fires. In the event of major fires, state and federal assistance may be requested.

J. Cultural and Recreational Opportunities

The Stillwater Historical Society has developed the Museum of the Beartooths located in Columbus. The 4-H and the Future Farmers of America Fair is held in Columbus at the Stillwater County Fairgrounds in August.

There are many reoccurring annual events around Stillwater County. The Reed Point Community Club hosts the Sheep Drive each labor day. Absarokee has a Farmer's Market on Labor Day weekend. A Farmer's Market is also held in Columbus on the Railroad Park every Thursday starting the first week in July through the first week in September. For a detailed listing of community events occurring throughout Stillwater County please refer to the Stillwater County Facebook Page and the Stillwater County Chamber of Commerce's Facebook Page.

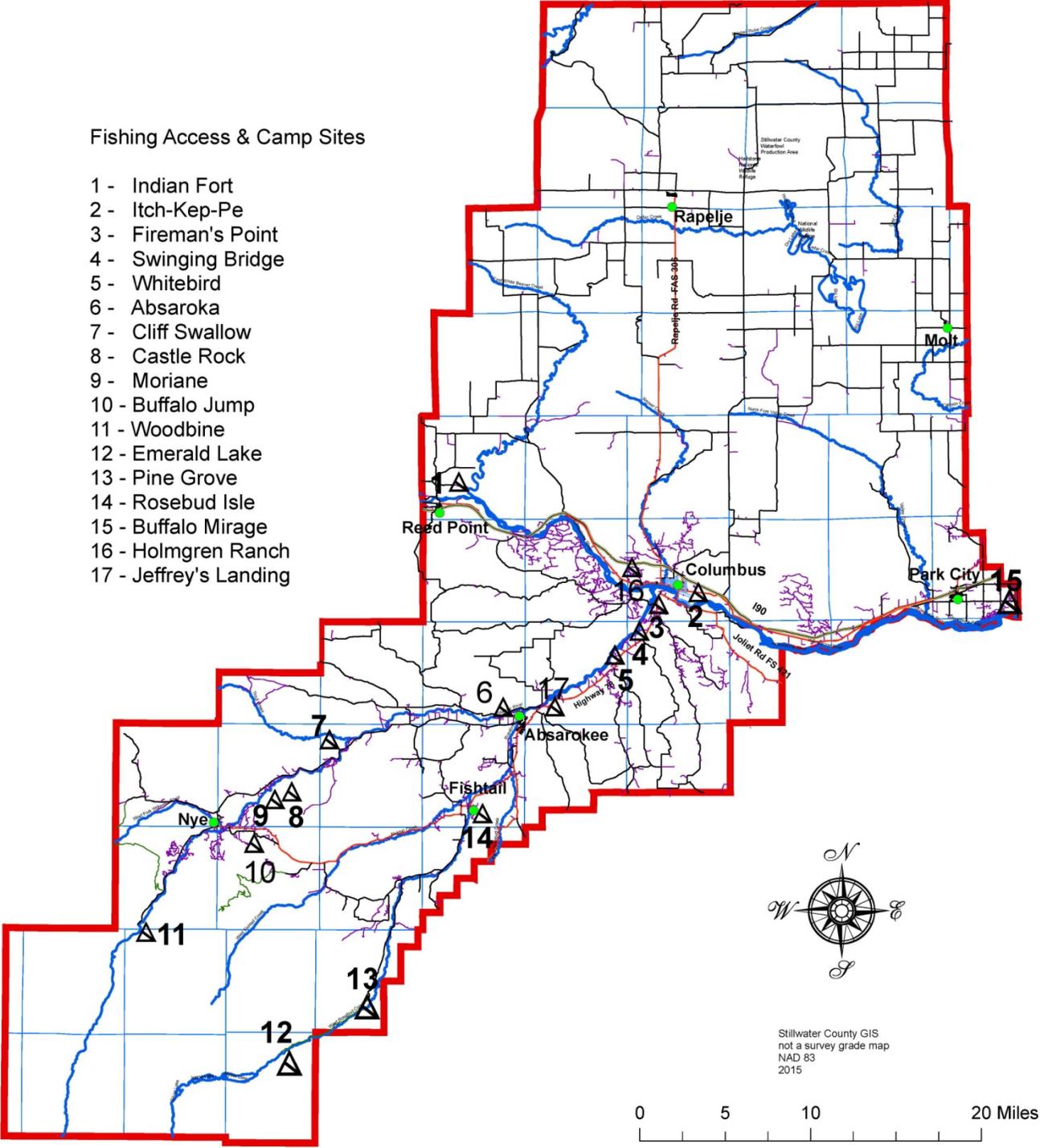
There are five developed Forest Service campgrounds within Stillwater County; Woodbine, Emerald Lake, Pine Grove, East Rosebud, and Jimmy Joe Campgrounds. These campgrounds have a combined capacity of 143 units which are accessible by car. There are also 30 free developed campsites available at Itch-Kep-Pe City Park in Columbus. A variety of dispersed recreational opportunities are available on the Custer-Gallatin National Forest including hunting, hiking, fishing, backpacking, cross-country skiing, mountain climbing, horseback riding, etc.

There are also thirteen fishing access sites managed by Montana Department of Fish, Wildlife and Parks within the County: Indian Fort, Fireman's Point, Swinging Bridge, Whitebird, Absaroka, Cliff Swallow, Castle Rock, Moriane, Buffalo Jump, Rosebud Isle, Buffalo Mirage, Holmgren Ranch, and Jeffrey's Landing. Refer to the map on the following page.

Stillwater County Recreation Sites

Fishing Access & Camp Sites

- 1 - Indian Fort
- 2 - Itch-Kep-Pe
- 3 - Fireman's Point
- 4 - Swinging Bridge
- 5 - Whitebird
- 6 - Absaroka
- 7 - Cliff Swallow
- 8 - Castle Rock
- 9 - Moriane
- 10 - Buffalo Jump
- 11 - Woodbine
- 12 - Emerald Lake
- 13 - Pine Grove
- 14 - Rosebud Isle
- 15 - Buffalo Mirage
- 16 - Holmgren Ranch
- 17 - Jeffrey's Landing



Stillwater County GIS
not a survey grade map
NAD 83
2015

ITCH-KEP-PE PARK is located along the Yellowstone River. The upper park contains about 22 acres, has a road network with three loops and a parking area with access to the Yellowstone River. There are thirty (30) developed campsites with gravel parking areas, picnic tables, and campfire grills. There is a restroom facility with men's and women's bathrooms, water and electrical service. The bathroom facility was developed with federal grant funds in the late 1960's. There is a solid waste collection container near the entrance to the upper park.

The lower park contains about 39 acres, has a road network with two loops and a boat ramp for access to the Yellowstone River. There are thirty (30) developed campsites in the park. These campsites include gravel parking area, an anchored picnic table and a campfire grill. A solid waste collection container is located near the boat ramp. There is a concrete, sealed pit privy located near the boat ramp. This park is a former State fishing access site which was deeded to the Town in the mid 1980's.

CITY PARKS

PIKE AVENUE PARK is located north of the railroad tracks and south of Pike Avenue between Highway 78 and Fourth Street. This park is on railroad right-of-way but is leased to the Town of Columbus. This is a lineal park containing about three fourths of an acre. There are picnic tables, park benches, trash cans, flower beds and a sign display area. Pike Avenue Park is decorated every Christmas by volunteers as the major Christmas display in the Central Business District. This park is also the location of a farmers' market, usually held every Thursday in late summer.

BEARTOOTH PARK is located south of Centennial Road along Keyser Creek and contains about 1.6 acres. This land was dedicated to the Town when Beartooth Heights was platted along with cash in lieu of land for park development. Beartooth Park is currently undeveloped, but provides a sledding area in the winter.

GRANITE PEAK PARK is owned by the Town of Columbus and includes 34 acres of land north of Sixth Avenue and west of Interstate 90 access road (9th Street). Three baseball fields, a softball field, and a soccer field have been developed on this site. The Columbus Community Garden is also located in the park. The Granite Peak Park Steering Committee coordinates activities for the park. This committee has expressed interest in rebuilding an old jogging path around the park. The fields have an underground sprinkling system connected to a well on site. Underground electrical serves the pump for the well. The fields are fenced with chain-link fencing along with chain-link backstops for the baseball and softball fields. A master plan has been prepared for the development of this park.

SHERWOOD PARK is located along East 4th Street North between 9th Street and North 11th Street. The park is less than one acre in size and was dedicated to the town of Columbus with the platting of Two Rivers Subdivision. Picnic tables, playground equipment, playground area, and swing set have been installed.

HERITAGE PARK is located centrally in the Town of Columbus between 4th and 3rd Avenues, Quarry Road, and North 2nd Street. Heritage Park also contains the Columbus Public Swimming Pool which is generally open from Memorial Day to Labor Day.

GOLF COURSE is located in the southeastern section of Town between the Yellowstone River and the Airport property. The Stillwater Golf and Recreation Association leases approximately 100 acres from the Town of Columbus on a long term lease. This is a nine-hole golf course which was re-built in 1986 to U.S.G.A. specifications. The golf course includes a driving range, practice green, clubhouse and two comfort stations.

HAWKINS PARK is two blocks from State Highway 78 in Absarokee and contains two tennis courts, picnic facilities, and access to Rosebud Creek.

ABSAROKEE POOL is located two blocks west of highway 78 on secondary road 420 and has recently reconstructed their swimming pool. The pool park also has two horseshoe courts and picnic facilities. The pool is managed by the Beartooth Park and Recreation District and the nonprofit Absarokee Pool Association.

ABSAROKEE RECREATION COMPLEX located off secondary road 420 just outside of Absarokee has four ball fields, playground, and a concession stand and is managed by the Beartooth Park and Recreation District.

K. Services for Low-To-Low Moderate Income and Aging

The Beartooth Healthcare Community located in Columbus is an 81 bed nursing home that consists of a Medicare wing, long term wing, and a memory care wing. Meadowlark Assisted Living which is currently transitioning to Caslen Living Center. Meadowlark contains 19 units with 16 used for assisted care living and 3 units as retirement independent living. This facility was built in 2000. The Columbus Apartments were built in 1985 for senior citizens and have 9 separate units. The Sage Apartments are a low income apartment facility with 12 units located in Columbus. The Homestead Lodge apartment facility built in the mid 1970's for senior citizens is located in Absarokee and has 32 units. Shipp's Assisted Living is also located in Absarokee and offers 10 beds. Assistance is available for low and moderate income individuals through HRDC that furnishes heat assistance, commodities, weatherization grants and food bank assistance.

Stillwater County has a welfare office which provides economic assistance and social services to low income families and individuals in cooperation with state and federal programs. The public school system in Stillwater County provides educational opportunities for low and moderate income families and participates in the subsidized lunch program.

Stillwater Billings Clinic, Beartooth Healthcare Community (Welcov) and other health care providers in the county participate in the federal Medicare and Medicaid programs. Senior Citizens are also served by a council on aging. There are Senior Citizen Centers in Absarokee, Columbus, Park City, and in Rapelje.

L. Central Business District

All eight town sites in Stillwater County have business districts of varying size and condition. The following table indicates the diversity of business activity in each town. The conditions of these districts vary. There are old buildings and newer buildings in various levels of repair. Columbus has a main business district and highway commercial developments within the Town limits along Old U.S. 10 (Pike Ave) and Highway 78 (portions of 6th and 9th Streets). The Absarokee business district is situated along both sides of State Highway 78. The Nye and Fishtail business districts are along Highway 419. Park City business district is located south of the railroad tracks and extends to Interstate 90. The Reed

Point business district is along Park Street and extends to the I-90 interchange. Rapelje business district is at the northern end of Highway 306. The financial condition of these small town businesses has fluctuated with the economy. The towns closer to the mining activity and the I-90 corridor have been more prosperous.

M. Other Planning and Development Activities

The City-County Planning Board is responsible for planning efforts within the Town of Columbus and their jurisdictional area adjacent to the Town. County Planning Boards focuses their planning on all jurisdictions in the County outside of the Town's jurisdiction. The Planning Board's functions include subdivision review and community planning. The City-County Planning Board acts as the Columbus Zoning Commission. A zoning map for the Town of Columbus is on page 42.

In 2006 Stillwater County created an Economic Development Department that focuses on public facility projects, hard-rock mining economic impact planning, economic development efforts county wide, business startups, expansions and retention, offers business trainings, seminars, and workshops, as well as providing local technical assistance for organizations throughout Stillwater County. Stillwater County Economic Development staff is funding by the Metal Mines License Tax (MMLT). For an explanation of the MMLT, refer to the diagram on page 43 called, *Allocation of Metal Mine License Tax Among Local Government Units*. MMLT allocations are determined by the State Legislation and are subject to change each biennium.

The Stillwater County Chamber of Commerce has a full-time Chamber Administrator and is involved with business retention and expansion, new business recruitment, and area promotion. They also promote tourism by staffing a visitor's center from May through September.

The U.S. Forest Service and Montana Department of Natural Resources are involved with the permitting of the east side development and expansion of the Stillwater Mine. They will also be involved with American Chrome Corporation mine if they decide to develop a chrome mine in Stillwater County. The Forest Service is also involved in planning activities for the land area within Stillwater County which is on the Custer National Forest. The Soil Conservation Service works with area farmers and ranchers on individual management plans. The federal Fish and Wildlife Service is involved with plans for the two wildlife refuges in northern Stillwater County.

Stillwater County is currently participating in the Beartooth Resource Conservation & Development Area Economic Development District. An area plan and overall economic development program was approved in 1995 for a five county area including Stillwater County. Beartooth RC&D provides a revolving loan fund for businesses, fuels and forestry program, food and agriculture development center, and regional economic development support.

The following table shows the land use throughout the County and provides the number of subdivisions and certificates of survey that have been filed in Stillwater County from 1997 through 2014.

| <u>Locations</u> | <u>Total Filed Subdivisions</u> | <u>Total Filed Cert. of Surveys</u> |
|------------------------------------|---------------------------------|-------------------------------------|
| Absarokee and Southern Stillwater: | 86 | 140 |
| Columbus Area: | 107 | 195 |
| Park City Area: | 73 | 74 |
| Northern Stillwater / Reed Point | <u>25</u> | <u>120</u> |
| Total: | 291 | 529 |

Source: Stillwater County Planning Department and the Clerk & Recorder's Office

TOWN OF COLUMBUS ZONING DISTRICTS

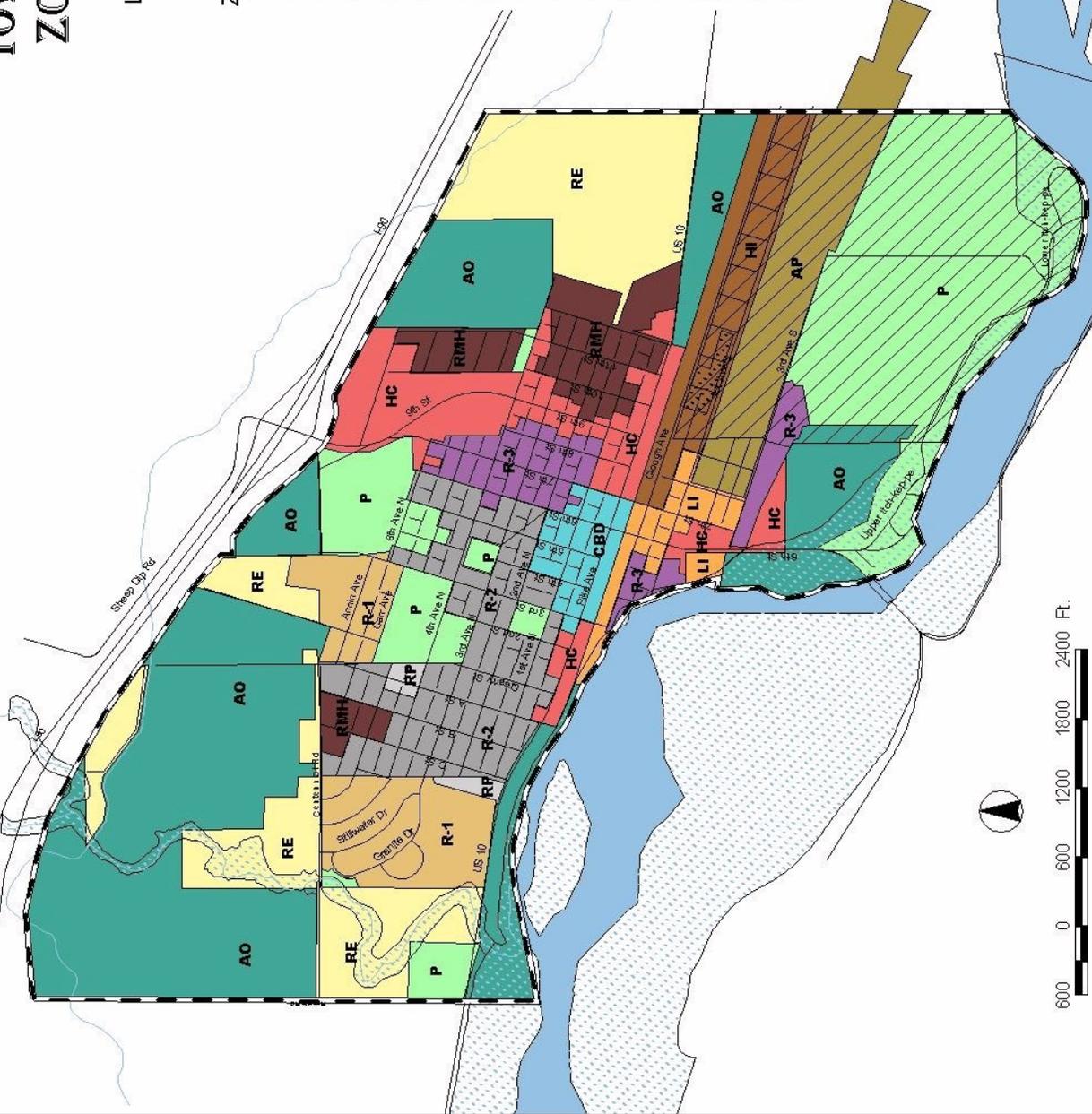
LEGEND



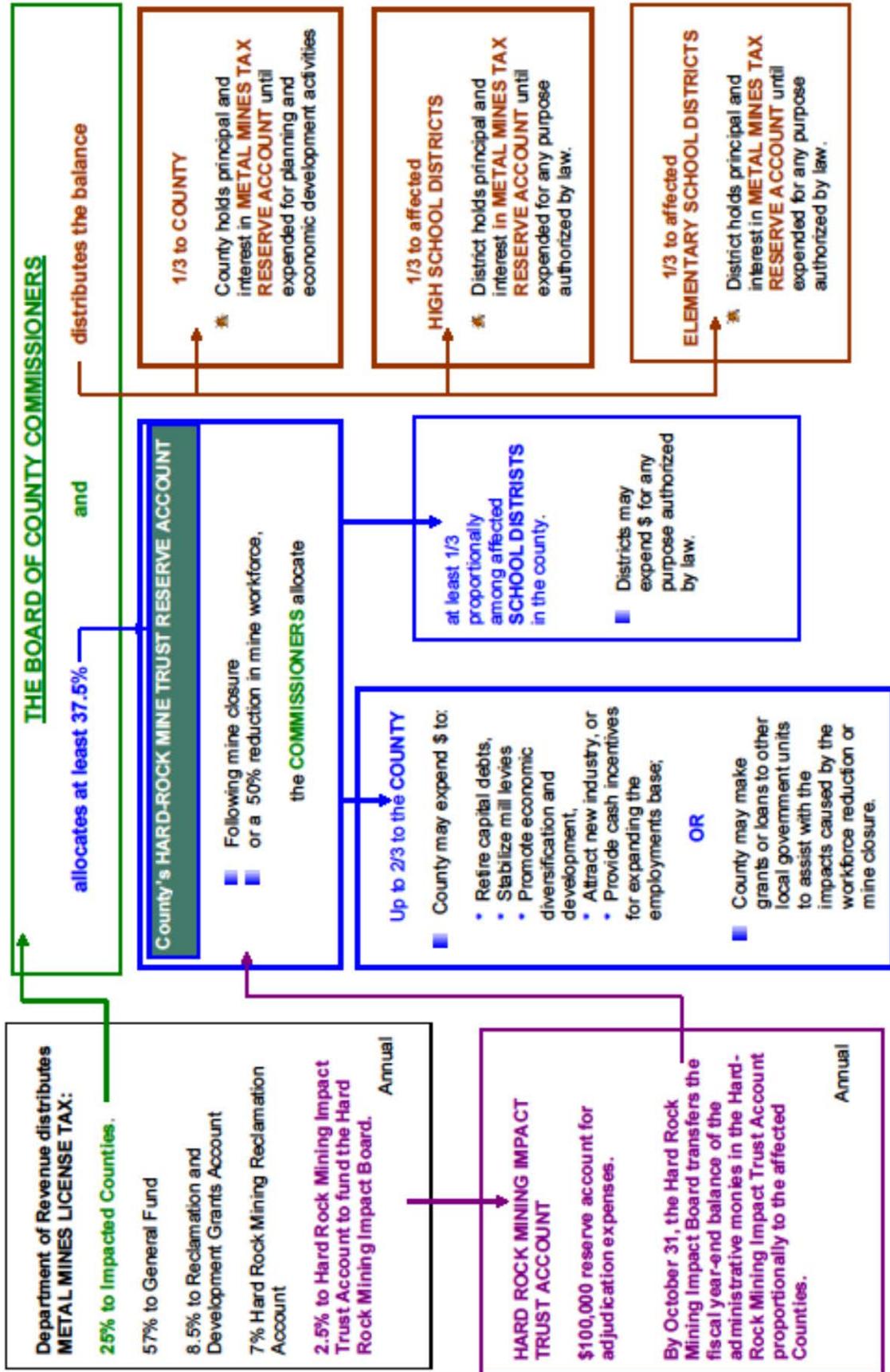
Planning Jurisdiction Boundary

ZONING DISTRICTS

| | |
|------------|---|
| AO | Agricultural Open Space |
| AP | Airport |
| CBD | Central Business District |
| HC | Highway Commercial |
| HI | Heavy Industrial |
| LI | Light Industrial |
| P | Public |
| R-1 | Residential Single Family (10,000 s.f.) |
| R-2 | Residential Single Family (6,000 s.f.) |
| R-3 | Residential Multi-family |
| RE | Residential Estates |
| RMH | Residential Manufactured Homes |
| RP | Residential Professional |
| | Block Placement Area |
| | Superfund Overlay |
| | Flood Hazard Areas |



ALLOCATION OF METAL MINES LICENSE TAX REVENUES AMONG LOCAL GOVERNMENT UNITS



SECTION IV

A. POTENTIALS FOR ECONOMIC DEVELOPMENT

1. Mineral Development

The Stillwater Complex is located in the Southern part of the county on the north slopes of the Beartooth Mountains. This layered igneous formation contains the largest known platinum and palladium reserves in the United States. Stillwater Mining Company, has been mining platinum group metals in the Stillwater Complex since 1986. Stillwater Mining Company is the only U.S. producer of platinum group metals (PGMs). PGMs are rare precious metals used in a wide variety of applications, including auto catalyts, fuel cells, hydrogen purification, electronics, jewelry, dentistry, medicine and coinage. Stillwater Mining Company is engaged in the development, extraction, processing, smelting and refining of PGMs from a geological formation in southern Montana known as the J-M Reef and from the recycling of spent catalytic converters. The J-M Reef is the only known significant source of PGMs in the United States and the highest-grade PGM resource in the world.

The Company conducts mining operations at its Stillwater and East Boulder mines in southern Montana. Concentrating plants are located at both mines to upgrade ore to a concentrate. The Company operates a smelter, refinery and laboratory at Columbus, Montana to further upgrade the concentrate to a PGM-rich filter cake. Another key segment of the Company's operations is the recycling of spent catalyst material to recover PGMs. They currently employ over 1,600 people.

Sizeable chromite deposits also exist in the Stillwater Complex. The Mouat mine at Mountain View above the SMC operation and the Benbow mine southwest of Dean were developed in the early 1940's. However, mining activity ended after World War II, started up again during the Korean War ended again in 1961. There are no current proposals to reopen the chrome mines.

2. Construction

Housing, school, highway, bridge, sewer, business district/incubator, and other construction projects will contribute to the economic activity of the County. There is potential for significant construction activity as a result of housing needs and associated infrastructure necessary to serve an increasing population and additional mining activity. Local contractors and building supply businesses will likely benefit from increased construction activity. Additional employment opportunities should also be created during construction.

3. Oil and Gas Production

Stillwater County contains several oil and gas fields. There are producing oil wells in the Dean dome between Nye and Fishtail. There are also producing gas wells in the Big Coulee field, Rapelje field and Lake Basin field in Northern Stillwater County. The potential developments of these reserves are dependent on supply and demand, prices, national and international markets. In the recent years hydraulic fracturing technology has made it possible to retrieve oil reserves hundreds of feet below the surface making retrieval now possible. There has been interest in oil development near the Dean area but currently there are no proposals to increase production of the oil and gas reserves in the County.

4. Agricultural Products

There is potential for direct marketing with grass fed livestock that is processed, packaged and labeled at local meat processing plants. There is potential for increased production of certified seed, the cattle stock seed industry has steadily expanded over the past ten years showing potential for further expansion. An increase of irrigated malt barely has proven benefits for surrounding counties and could do the same in Stillwater County. Youth agriculture entrepreneurship programs like 4-H and FFA will continue to increase awareness of the importance of agriculture throughout the county. There has been an increase in the development of microbreweries and distilleries utilizing Montana grains, this trend seems profitable and will continue to grow.

5. Tourism Promotion

Stillwater County has a variety of recreational opportunities, historical, cultural and natural resources which provide potential for further economic development in the recreation/tourism industry. The level of employment and economic activity associated with tourism has not been quantified but plays a role in the County's economy.

Interstate 90 plus the primary and secondary highway network in Stillwater County serve the main street businesses in each of the small communities around the county. The County's proximity to Yellowstone Park and Custer National Forest creates opportunities to promote the area's amenities. There is a potential for entrepreneurs to further develop or expand recreation/tourism related business in the County. The auto/truck plazas along I-90 at the Columbus and Park City interchanges offer fuel, restaurants, convenient stores, and a motel for the travelling public. These services can be expanded. Reed Point is a potential site for a similar type auto/truck plaza.

Potential areas to increase tourism in Stillwater are areas around the Absaroka (2nd Crow) Agency in the southern portion of the county and areas along the Lewis and Clark expedition trail. The Museum of the Beartooths is the sole entity responsible for preserving this region's history and providing education for generations to come, which plays a role in the overall health of Stillwater's communities and the local economy.

Additional potential exists in guided tours, hunting, fishing, and horseback or float trips. The Yellowstone and Stillwater Rivers are scenic and challenging float trips. The Beartooth Mountains provide opportunities for fishing, hunting and horseback trips. There may also be potential to develop sports complexes, such as archery, pistol and rifle ranges. Granite Peak Park Sporting Complex in Columbus offers Little League and Softball facilities that attract league and tournament play. Additional potential exists in the Columbus area to host smaller workshops or conferences with a new county community center facility.

6. Manufacturing

The Town of Columbus owns a 20 acre industrial park with water, sewer, gas, electric, telecommunication lines, and a graveled street. If street improvements were made and the telecommunication and broadband services were increased, these industrial sites would be more marketable to private business interests. These sites have railroad frontage and are less than one mile

from Interstate 90. There is the potential to sell or lease these sites individually or any combination of the nine blocks. Vacant lots are potential for development and there are a few lots that have underutilized or vacant buildings that can be redeveloped.

7. Broadening Telecommunication and Broadband Infrastructure

Improved telecommunication and broadband infrastructure in the Town of Columbus as well as throughout the rest of the county would open avenues to be able to market to technology companies. Once the infrastructure is in place, it would be beneficial to create town or even county wide wireless communications. Home base business and residential areas outside of Columbus would immensely benefit from broadband capabilities that currently are not available.

8. Alternative Energy

The Stillwater Valley has the ideal conditions to support alternative energy, specifically wind power. Large wind farm companies have shown interest in our region for wind farm development but none of the proposals have left the development phase. Alternative energy development does show promise and could provide positive economic impacts for the Stillwater Valley.

9. Increased Utility Infrastructure

Northwestern Energy is constructing a new 100kV transmission line from the Columbus Rapelje Substation to a new substation near Nye. The new transmission lines target service date is 2020. The new transmission line will not only improve the reliability of electric service to current users, but it will also be able to accommodate future growth. The investment Northwestern Energy is providing within Stillwater improves the current infrastructure making the county more attractive for future business and residential growth.

B. POTENTIAL PROBLEMS AND CONSTRAINTS

1. Natural Hazards

Numerous areas in Stillwater County are unsuitable for development because of flooding, landslides or rock falls, unstable soils, steep slopes in excess of 25 percent grade, high water table conditions or lack of potable water supply.

2. Transportation System.

There is a lack of an additional bridge of the Yellowstone River in or near to Columbus. If there were structural issues or a natural disaster like a flood that would take out the Highway 78 bridge over the Yellowstone River the closest alternative crossing is approximately 28 miles away in Laurel.

The Town of Columbus has continually grown over the past five decades and there is a need for an additional interchange on Interstate 90. Adding another interchange on/off I-90 would allow for development and help alleviate the congestion around Exit 408. Residential sprawl and rural residential development outside of Columbus has created heavy traffic routes through residential areas that could be avoided if another interchange was established. Financially, a project of this magnitude would not be feasible for the Town or County making state and federal financial assistance necessary.

Maintaining 900 miles of unpaved County roads is a major expense for Stillwater County. Many roads that are paved are aging and showing signs of deterioration in some cases. Local funds are insufficient to correct the problems. Improvements will require federal, state or private funds.

3. Improved Industrial Sites

It is difficult to attract a prospective business to an industrial area which does not have the necessary infrastructure. The Columbus industrial sites have railroad frontage and are located less than a mile from Interstate 90, gas, electricity, telephone, water and sewer are at the sites, but the streets are gravel. There are no other designated industrial sites in the County.

4. Business Development Location in Columbus.

In Columbus, there is a lack of developable ground where businesses can build facilities that are already connected to utilities and city hook-ups. Business park developments can not occur until land is acquired and then developed near Town amenities. Land acquisition and infrastructure improvements need to occur to attract business development in and around Columbus.

5. Water and Sewer Systems

Many rural systems are at capacity or have deficient storage capabilities which make growth unobtainable. State and Federal funding mechanisms needs to be increased and available for rural water and wastewater system so that districts are not solely reliant on users in those rural areas for improvements. Improvements to those systems are very costly and there aren't enough state or federal programs with adequate staffing for technical assistance to cover all rural areas of Montana.

6. External Constraints

State and Federal budgeting constraints have created a lack of continual funding for infrastructure

projects. Many State funding programs have dissolved and/or merged with other programs but no additional funding allocations are budgeted. Local allocations are no longer available making each community compete for infrastructure funding.

7. Deficiencies with Telecommunication and Broadband Infrastructure

Telecommunication and broadband infrastructure implementation and improvements are very costly. Local and State governments need to work with local utility providers in increase coverage across the state. More State and Federal funding allocations would make improvements much more obtainable.

8. Incorporation of Towns in Stillwater County

As populations throughout Stillwater County continue to increase, there is an escalating strain on County resources. Ideally, towns throughout Stillwater should look to incorporate to be able to govern themselves within their jurisdictions.

9. Housing Development

Undeveloped land has created sprawl outside of towns. State and Federal funding mechanisms are needed to extend city services to be able to encourage development for residential areas adjacent to towns.

SECTION V

ECONOMIC DEVELOPMENT/ INVESTMENT STRATEGY

Our multi-year economic development and investment strategy includes continued public-private cooperation among local governments, civic organizations and private enterprises. We will use the organizational structure of the Overall Economic Development Committee for the program. Development programs, activities, and projects will be assessed with identified assumptions regarding trends in the area economy, economic development goals and objectives, and general criteria.

Assumptions

The economic outlook for the Stillwater County economy is good. The agricultural sector is expected to remain variable according to supply and demand. Ag commodities have seen their highest numbers in nine out of the past ten years and are expected to decrease in the coming years but should continue to be profitable for local farmers and ranchers. Increased production of malt barley in the south central region is projected in the coming years due to the increase in microbreweries throughout the nation.

Current trends in the Montana tourism industry indicate nonresident spending has increased state wide for the past two year. The Montana tourism industry in 2014 brought in \$3.98 billion from nonresident visitors spending across the state. Tourism within Stillwater County is expected to continue to increase with increased local and state promotional efforts.

Agriculture, mining, and service sectors of the economy have the greatest potential for generating additional employment and income. Construction, retail trade, and manufacturing also have some potential for generating additional employment and income. Additional commercial and residential development is expected along the Interstate 90 communities of Columbus, Park City and Reed Point.

Goal and Objectives

Goal

To provide a method for guiding and coordinating the efforts of local governments, business, industry and civic organizations concerned with the economic development of the County for the purpose of creating a more stable and diversified economy with new employment opportunities to increase personal income and expand the local tax base.

Long Term Objectives

1. Encourage the development and economic use of natural resources in the county especially minerals and agricultural products. Appropriate conservation measures are also endorsed for soil, water, air and other significant natural resources.
2. Work with existing businesses and industry having expansion plans and actively seek new businesses interested in the county. Inform prospects of advantages of locating in the county and assist with financial arrangements for infrastructure or site development whenever possible.

3. Promote the County to attract new business, industry, and visitors to increase economic activity. Cooperate with civic groups in the county on tourism promotions and public relation efforts. Work in partnership with other Montana programs and continue to promote the Montana Brand.

Short Term Objectives

1. Utilize an Overall Economic Development Committee with diverse representation and involvement in the program. The committee will summarize and analyze the area and its economy, identify potential for economic development, recommend an economic development and investment strategy, and inform county residents of program plans and accomplishments.
2. Determine additional needs for community facilities and services. Study existing road system, water supply, sewer facilities, industrial parks, health care services, fire protection, parks and recreation, and the adequacy of housing necessary to support economic development.
3. Identify continuing education and training needs for the county work force, unemployed, underemployed, and identify organizational structure necessary to meet these needs. Special emphasis will be placed on telecommunications, computer literacy, and automation. Involve appropriate organizations to coordinate this effort as needed.

Criteria to guide resource utilization

1. Projects which support basic industries such as mining, agriculture and other exporting industries will be given the highest priority. The unemployed or underemployed will benefit from new job opportunities. Agriculture is county wide and not limited to a specific geographic location. Mining is located in southern Stillwater County. Major manufacturing enterprises are located in Columbus. Economic development projects will be sponsored by Stillwater County, Town of Columbus, or private enterprises.
2. Projects which improve the county transportation system will be given high priority. The unemployed or underemployed could benefit from construction jobs or secondary employment opportunities. The geographic location of these projects would be on the arterial and collector routes serving the county and other major transportation routes.
3. Projects which offer training or retraining for unemployed or underemployed residents of the county will be given a moderate priority. Special emphasis will be given to programs that offer continuing education/career training in the use of computers and telecommunications. These projects may be for any type of business and in any part of the county. Stillwater County or Federal/State Job Training programs would be the likely sponsors for the projects.
4. Projects which provide solutions to our infrastructure problems will be given high priority. Construction job opportunities will benefit unemployed or underemployed. Most businesses could potentially benefit from these projects. Infrastructure projects would primarily be located within town sites. Infrastructure projects will be sponsored by Stillwater County or the Town of Columbus.

5. Value added projects which enhance locally produced commodities will be given a high priority. The unemployed or underemployed would benefit from new job opportunities. These projects may be located in any part of the county and would likely be focused on agricultural commodities, timber products, or processing of mineral concentrates.

6. Projects which promote the county to increase tourism or attract new industry to the area will be given a moderate priority. The unemployed or underemployed could benefit from added job opportunities. Most service sector and retail businesses would potentially benefit. Projects of this type will likely be located along the interstate or in Columbus and Absarokee area. Stillwater County, Town of Columbus, civic groups, or private enterprise would be the sponsors of these projects.

7. Affordable housing projects which provide low income/assisted living facilities will be given a moderate priority. The unemployed or underemployed will benefit from affordable housing. These projects will likely be located in or adjacent to existing town sites.

**STILLWATER COUNTY
OVERALL ECONOMIC DEVELOPMENT PLAN**

COURSE OF ACTION

Projection of Programs, Activities and Projects

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|--|----------------------|----------------------|--------------------|---|--|
| Upgrade water and sewer system for Absarokee | X | | H | USDA- Rural Development Absarokee Water Users Stillwater County | Combine RSID and Water & Sewer District |
| Increase Broadband and Telecommunications | X | | H | Grants Stillwater County | Governor's Office of ED New funding sources discussions Legislative Sessions 2015 |
| Storm Drain Improvements (Park City) | X | | H | Stillwater County USDA-RD RSID | Heavy flooding around the school Residents have filled in borrow pits in the road ROW |
| County Road and Bridge Maintenance and Upgrades | X | | H | Stillwater County TSEP Grants | More infrastructure funding for Montana (Legislature 2015) |
| New Road & Bridge Shop/Office | X | | H | Stillwater County INTERCAP loan | Spring 2015 OSHA compliance needs |
| Courthouse Renovations | X | | H | Stillwater County INTERCAP loan Bonds | ADA compliant including an elevator West Annex (cleaned & utilized) |
| Water & Sewer Plans and Maintenance (Rapelje) | X | X | M | Stillwater County Rapelje Water/Sewer Users CDBG/TSEP | |
| Expand Law Enforcement & Dispatch Center | X | | M | Stillwater County INTERCAP Bond | |
| New Library & County Community Center (Civic Center) | | X | H | County, Bond Capital Campaign CDBG-ED/ EDA/USDA-RD | Land Funding |
| Extend Sewer System (Park City) | | X | M | TSEP, CDBG, USDA-RD, DNRC | Park City already has a Water & Sewer District (Sewer ONLY). Extend services for development and residential areas north of I-90 |

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|---|----------------------|----------------------|--------------------|---|--|
| Upgrade Fire Hall Facilities (Fire Protection Training) | | X | M | Fire Districts | |
| Elderly Assisted Living Facility (Absarokee) | | X | M | | |
| Pedestrian Walkways, Bikeway and, Sidewalk Project | | X | L | | |
| Second I-90 Interchange on R306 (Rapelje Rd) | | X | L | Community Groups/Organizations Stillwater County State Grants (walkability) Town | Network linking communities throughout the County. *Reoccurring need in all communities. |
| Second Bridge over Yellowstone River | | X | L | Stillwater County MDT | |
| House Availability | | X | L | Stillwater County Town MDT | |
| Water & Sewer Plans and Maintenance (Reed Point) | | X | L | Stillwater County (Incentives) Private Developers | |
| Schools Expansions, Parking, and Crossings | | X | | | Park City (overcrowded) Absarokee (attendance declining) Columbus (overcrowding) |
| Incorporation (Absarokee & Park City) | | X | L | Stillwater County Private Contractor (Planner) | Assistance available through the Government Division at MSU |
| Maintenance of Public Buildings | X | | H | Stillwater County | Stillwater Pavilion |

Goal II: Economy

Stillwater County

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|--|----------------------|----------------------|--------------------|--|---|
| Increase Tourism (web presence and signage) | X | | M | MT Office of Tourism Stillwater County Yellowstone Country, Montana Tourism Organization | Support the Museum of the Beartooths. Reoccurring need in all communities Chamber of Commerce |
| Provide Continuing Education (employees/businesses) | | X | M | Dept. of Labor & Industry (Job Services) Stillwater County ED / Chamber / Beartooth RC&D Adult & Community Education | |

Goal III: Communications

Stillwater County

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|---|----------------------|----------------------|--------------------|---|-------------------|
| Expand County GIS Program & 911 System (Improvements/Rural/Rural Addressing) | | X | M | Stillwater County Grants (State/Federal) | |

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|--|----------------------|----------------------|--------------------|---|---|
| Stabilization of Yellowstone River | X | X | M | NRCS/FWP/MDT | |
| Tree Maintenance Ordinance (Enforcement) | | X | H | Stillwater County Town Grants | Arbor Grant Tree City USA |
| Support Land Use, Wildlife/Urban Interface Education and All Natural Resources Education | | X | M | Stillwater County Landowner Associations | |
| Control Wildlife Populations and Maintain a Healthy Wildlife Populations | | X | L | FWP | Absarokee |
| Support Responsible Natural Resources Development (wind/oil/gas/mineral exploration) | | X | L | Town County | Create policy. Needs to include the cohesive balance b/w EPA, industry, and economy |

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|--|----------------------|----------------------|--------------------|---|---|
| Extend infrastructure for Commercial and Residential Development (including sewer and water) | X | | H | Town County CDBG / USDA-RD | Extend Town services for home development. Purchase land for business development. |
| Additional Railroad Crossings for Emergency Services Elevate Railroad Crossing | X | | H | Town Stillwater County BNSF | |
| Develop a Business Park More Tech Park Space | X | | M | Town Stillwater County Stillwater County Chamber CDBG | Assistance from Beartooth RC&D for planning |
| Expand and Repair Sidewalks | | X | H | Town MAP-21/TAP | |
| Storm Drain Plan & Improvements | | | H | Town CDBG | |
| Downtown Revitalization/Aesthetics/Parking | | X | M | Main Street MT (DOC) Town TIF District | Business Licenses |
| Industrial Site Improvements | X | | L | Town CDBG | |
| Water Main Replacements & Improvements | | | | Town USDA - RD | |
| Widen Highway 10 | | X | L | MDT | |
| Approve Visitor Information Center | X | X | L | Town Stillwater County Chamber Grants (Lewis & Clark and MT Office of Tourism) | Chamber |
| Support School Expansions | | | | Town | Overcrowding is a concern |
| Continued Support of the Park and Recreation Areas | | X | | Town Granite Peak Park Steering Committee | Better heater for the pool is needed |

Goal II: Services

Columbus

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|---|-------------------------|-------------------------|-----------------------|--|--|
| Update Town's CIP | X | | H | Town CDBG | Probable in 2015 |
| Granite Peak Park Master Plan Update | X | | H | | Slated to start 2015 |
| Create Business Incentives & Develop and Diversify Small Business Opportunities | X | | M | Town USDA – RBEG TIF, Incentives, Improvement District Main Street Montana | Tax Increment Finance District Business Incubator |
| Support Small Business Education | X | X | M | Town Stillwater County ED/ Beartooth RC&D Stillwater Chamber Columbus Adult & Continuing Education | |

Goal III: Economy

Columbus

| Priority | Short Term (1-4 yrs) | Long Term (5-10 yrs) | Priority (L, M, H) | Possible Funding Agents | Comments/Concerns |
|---|-------------------------|-------------------------|-----------------------|--|--|
| Increase Tourism (web presence and signage) | X | | M | MT Office of Tourism Stillwater County Yellowstone County | Support the Museum of the Beartooths. *Reoccurring need in all communities Local Chamber |
| Provide Continuing Education (employees/businesses) | | X | M | Dept. of Labor & Industry (Job Services) Stillwater County Ed | |



Molt

Reed Point

Columbus

Park City

Absarokee

Fishtail

Nye

Dean

R18E

R17E

R15E

R16E

R23E

T1S

T2S

T3S

T2N

T1N

T1S

T2S

T3S

Yellowstone River

Stillwater River

uster-Gallatin
National
Forrest

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