

HRDC

COMMUNITY NEEDS ASSESSMENT 2019

ACKNOWLEDGEMENTS

HRDC Community Needs Assessment Task Force would like to thank all of our partners, volunteers, and customers who took the time to take the survey and participate in our community forum discussions. A special thanks to those who let us use their space for our community forum discussions:

- **Bozeman Public Library**
- **Fork & Spoon**
- **Manhattan Senior Center**
- **Three Forks Community LIbrary**
- **Livingston City County Complex**
- **Gardiner Community Church**
- **Meagher County Community Center**
- **West Yellowstone Povah Community Center**

Thank You!

The HRDC Community Needs Assessment is a compilation of survey data, customer data, as well as census estimates. In addition to these pieces, the needs assessment relies heavily on the supplemental sources available in our community, both qualitative and quantitative. Supplemental sources could include but are not limited to: housing assessments, health needs assessments, news articles, community outreach materials, housing action plans as well as numerous other sources. We rely heavily on our partners data sets as well as the supplemental sources available to us when compiling our needs assessment. Our needs assessments primary function is to be a community tool, easily utilized by anyone. We have a detailed site source in back, listing all sources we gleaned from throughout this process. Each source is divided by need, and includes a brief description of the source itself.



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II. INTRODUCTION

The following report provides context for demographic and socioeconomic conditions in Gallatin, Meagher, and Park Counties. This portion of the report draws heavily on the supplemental resources and data available in our community.

At the time of this publication, reports compare 2010 Census data to 2017/2018 Census data estimates, as well as data from other sources including the U.S. Department of Housing and Urban Development (HUD), the U.S. Department of Labor (USDOL), and the National Center for Education Statistics (NCES), the Center for Applied Research and Engagement Network (CARES), American Community Survey, as well as many other data sources. Indicators are reported by community, and include: population, employment, education, housing, income, nutrition, and healthcare. Additionally, side by side county comparisons for Gallatin, Park, and Meagher Counties are included.

As a Community Action Organization, our responsibility is to identify and respond to our community's most pressing needs. Thus, every few years, we conduct a Community Needs Assessment which informs our Strategic Plan. Some programs and services you may be aware of that stemmed from this process include our Homeownership Center, Streamline and our Livingston Warming Center. With the survey, we are launching our 2019 Community Needs Assessment. The responses gathered from the survey tool - in conjunction with an evaluation of additional local, regional and national data as well as focus groups, town hall discussions and stakeholder interviews - will inform our strategic priorities for the next three years. Your participation in our Community Needs Assessment survey is greatly appreciated and will ultimately help us empower our customers while building a better community. The survey consisted of three sections of multiple-option questions. The knowledge gained from this survey will be of value to HRDC and potentially members of the communities it serves. Data collected with this survey will be used to analyze the unique needs of each community in southwest Montana and inform HRDC's Strategic Plan 2020-2023.

Population

Based on the U.S. Census Bureau, the state of Montana has seen a 7.4% population increase from 2010 to 2018, with current 2018 estimates at 1,062,305 overall (**Figure 1**).

According to the U.S. Census Bureau 2013-2017 5-year estimates, a total of 118,734 people live in the 7,799.34 square mile report area defined for this assessment (**Figure 2, Figure 3**). The population density for this area, estimated at 15.22 persons per square mile, is less than the nationwide average population density of 90.88 persons per square mile.

According to the Montana Labor Report, Gallatin County specifically has experienced a 25% population increase since 2010. As indicated by the Montana Labor Report, the Bozeman micropolitan area had a greater population that over 74% of growth was due to people moving to the area. The dramatic increase in population has had measurable effects on virtually all facets of life in Gallatin County, particularly on housing and the economy. Park County has seen a population increase of 7% while Meagher County, uniquely, saw a decline in population from 2010 to 2018 with a drop of -1.8%. Collectively, there was an increase of 32% in population across the three county region from 2010 to 2018.

Employment

Employment data for the United States, Montana, and the tri-county area as a whole is detailed below. Overall, the entire tri-county area experienced an unemployment rate of 3.8% in December 2018, up from the Montana unemployment rate of 3.6% (**Figure 4**). The national unemployment rate is 3.9%, respectively. The natural or "normal" unemployment rate trends around 4% over time. An unemployment rate lower than 4% tends to suggest that businesses may struggle filling job openings or finding workers to meet their demand.

Gallatin County had the lowest unemployment rate in December 2018, reported at 2.7%. This is significantly lower than the neighboring counties of Meagher and Park with unemployment rates at 3.6% and 4.4% respectively. One factor leading to Gallatin County's low unemployment rate is that many people already

have jobs prior to their arrival in the valley. However, Gallatin County's low unemployment rate began to restrict business growth because employers are unable to find workers to fill positions, limiting their ability to produce enough product to meet demand. Another factor contributing to the low unemployment rate is the growing number of individuals reaching retirement. Across the state, we have a disproportionately high baby boomer cohort reaching retirement without enough young workers to replace them.

Bozeman's labor force was the fastest growing in all of Montana, with an average annual rate of 4.1%, compared to the overall Montana rate of 0.7%. Gallatin County's labor force is made up of 64,000 people making it the second largest in Montana. This rate in Gallatin County makes up 12.2% of the entire statewide labor force. Also included within Bozeman's labor supply are workers from Park County. Park County's labor force included 8,600 workers in 2017, 1.6% of Montana's total labor force.

Despite low unemployment, employees and employers are still facing challenges in our communities. These challenges include housing, transportation, and child care. Many employers want to confirm that their employees have secure affordable housing before offering employment because they know the challenges the housing market can pose on an individual or family, particularly to those new to the area.

Economy

Gallatin

The top five job industries in Gallatin County in 2017 were retail trade, food service and accommodation, healthcare, construction, and professional services. Specifically, in Bozeman, the largest employer in 2017 was retail trade as it has become a major shopping destination within the larger region. Many residents of Big Sky, Three Forks, Manhattan, Livingston, West Yellowstone, etc. travel to Bozeman for their retail-related needs. In addition to retail trade, another emerging industry in Bozeman is professional services, specifically tech-related positions. The tech industry makes up approximately 60% of professional service jobs in Gallatin County, which adds a significant contribution to the total job growth of the area.

The construction industry in Gallatin County showcases these growth rates with their payrolls, which continue to grow by nearly double the statewide average. In the last five years, construction has added the most jobs in Gallatin County when compared to other counties in the state. For example, comparing Gallatin County to Flathead County, Gallatin County added nearly 430 construction jobs per year while Flathead added 160 per year.

Park

Within Park County, the top four job industries in 2017 were accommodation and food services, healthcare, retail trade, and manufacturing. Despite the overall trend of slow job growth in the state of Montana, some Park County industries actually accelerated in job growth through 2017 and into 2018. Due to the close proximity to Yellowstone National Park and the multitude of outdoor recreation opportunities, many jobs within Park County are centered around tourism rather than economic activity from Bozeman. Due to Bozeman's growing population, it is believed that Park County may be experiencing a delayed benefit from their neighbor's sudden surge in population growth.

Meagher

Meagher County differs in many ways from Gallatin and Park Counties, specifically with regards to its top job industries. In Meagher County, the top job industries are agriculture, forestry, fishing and hunting, healthcare and social assistance, and accommodation and food services. Tourism does not play a significant role in the Meagher County economy as it does in Gallatin and Park County because it is located much farther away from Yellowstone National Park and the other outdoor recreational activities that have a regional draw. In Meagher County, roughly 60.3% of the total population is in the civilian labor force.

Education

According to the 2018 Montana Economic Report, the unemployment rate for Montanans with at least a bachelor's degree was under 2%. However, the unemployment rate for Montanans without a college degree was 4%. Within our tri-county service area, post secondary education options are available including Montana State University and Gallatin College. According to Census estimates, 57% of residents in Bozeman have a college degree; our workforce is highly educated (**Figure 5**). This percentage compares to the U.S. average of 32% and the Montana average of 30%.

Education needs were not a prominent finding among our survey and customer data. While the need for child care was a frequent request, and HRDC operates an early childhood education program, we do not find significant results outside those areas that are related to educational attainment.

Gallatin

According to the Census data, 96.8% of Gallatin County residents have a high school diploma or higher, with 48.8% of the population having a bachelor's degree or higher.

Park

According to Census data, 95.7% of Park County residents have a high school diploma or higher, with 34.1% of the population having a bachelor's degree or higher.

Meagher

According to Census data, 92.2% of Meagher County residents have a highschool diploma or higher, with 19.6% having a bachelor's degree or higher.

Housing

Throughout HRDC's Needs Assessment process, housing needs were discovered as a very pressing issue in each community. The largest impacts of the regional population growth seem to be on a community's infrastructure, particularly housing affordability and availability. Nearly 30% of renters in Gallatin County spend 40% or more of their income on housing costs.

A cost burdened household is defined as a household that spends over 30% of its monthly income on housing costs. In Gallatin County, 13,523 out of 40,723 households are considered cost burdened, summing up to 33%. Within Park County, 2,306 out of 7,552 households are considered cost burdened, summing up to 31%. Lastly, in Meagher County, 216 out of 777 households are considered cost burdened at 28%. These numbers for the tri-county area are staggering as it compares to the state average (27.87% cost burdened households). The only county in line with the state percentage of cost burdened households is Meagher County.

According to the Montana Economic Report, since 1990 Montana's gross rent increased by 26%, compared with the U.S.rate of 16%. At the time, this put Montana as the eleventh fastest growing among all states. Additionally, housing costs have outpaced household income increases. There are simply not enough houses or rental properties to meet the demand in our service area.

Income

The income measure used in this report is median household income based on U.S. Census Bureau estimates, 2014-2018 (**Figure 6**). Gallatin County has the highest median household income, at $61,499. Both Park and Meagher Counties have median household incomes ($49,194 and $43,109 respectively) lower than state ($52,559) and national ($60,293).

According to the Montana Labor Report, Gallatin County has experienced a wage growth of nearly 7.5%. Uniquely, Montana has more people working part-time or part-year jobs over not working at all. The average workweek for Montanans is 37.9 hours a week, with an hourly wage of $21.09.

The poverty rate in Gallatin County is 9.0%. Following Gallatin, Park and Meagher Counties poverty rates are 10.5% and 15.9%, respectively. The poverty rate in Montana as a whole is 13.0% and in the United States, 11.8%.

Food & Nutrition

According to the Montana Food Bank Network, approximately 1 in 9 Montanans struggle with hunger while nearly 37,000 children live in food insecure homes. Food insecurity as defined by the Montana Food Bank Network refers to, "The inability to access food in a consistent manner, resulting in reduced quality or variety of diet." In 2018, 117,000 Montanans received food through partners of the Montana Food Bank Network.

The United States Department of Agriculture defines a food desert as a low-income area with little or no access to a supermarket, large grocery store or healthy foods. The rural nature of many of our households requires much more than a 10 mile travel to a market, for example, Clarkston, Gallatin Gateway and Springdale.

Hunger and food insecurity can also be attributed to simply a lack of access to food. Over half of Montanas 56 counties have communities deemed as food deserts. A food desert is defined as a low-income area where at least 500 people or 33% of the community's residents must travel more than ten miles to the nearest supermarket. Nearly 72,000 individuals live in areas considered food deserts with extremely limited access to grocery stores. This, of course, means finding access to fresh and affordable food is a routine challenge for many Montanans.

According to the Montana Foodbank Network, hunger and food insecurity are made worse due to the massive underutilization of public food programs such as SNAP, WIC, School Breakfast, and the Summer Food Service Program. Much of this underutilization can be attributed to a lack of knowledge about the programs, confusion over eligibility, limited program availability in some areas, as well as the stigma of participating in public programs.

The Kids Count Data Center collects data on the number of students on free or reduced price lunches during the school year. For all schools in Gallatin, Park, and Meagher Counties, 3,527 students (22.6%) were eligible for free or reduced price lunches during the 2017-2018 school year, which is lower than the statewide average of 46%. Free and reduced price lunch numbers depend on participation which is synonymous with "eligible" in this instance. This number in some cases is lower than those who could be receiving the meals, meaning once again it is underutilized due to stigma, knowledge or the barrier of filling out paperwork..

In Gallatin County, 2,691 students (20.0%) were eligible for free and reduced price lunch which is lower than the statewide average and lowest of all the report areas. Park County had 695 students (36.3%) that were eligible for free or reduced price lunch, which is lower than the Montana average. Meagher County had 141 students (65.3%) eligible for free or reduced price lunch, which is higher than the state average and the highest of all the report areas.

Child Care

The number of children ages zero through five (0-5) rose consistently between 2009 and 2014; however, in recent years there has been a gradual decline in the number of young children in Montana (down 1% since 2015).

As of 2017, there were an estimated 74,576 children ages 0-5 in Montana. The number of children ages 0-5 living in families with low income, defined as under 150% of the Federal Poverty Level, was estimated at 25,576 in 2017. This represents a decline of 8% since the high in 2014.

The early care and education (ECE) landscape in Montana is a mixed delivery system including public and private providers offering child care, preschool, and pre-kindergarten programs. Less than half of children needing care can be served by existing ECE capacity. In September 2018 the total statewide licensed ECE capacity was 19,982; 44% of children likely needing care can be served by the existing ECE capacity. Lack of access to child care may dissuade some parents from entering the labor force. When considering all families in the state, regardless of their labor market status, existing ECE slots in the state could serve 28% of all children under age 6. In the counties that HRDC serves, the following represents the percent of children with all parents in the labor force that can be served by existing ECE capacity; Gallatin: 50.4%, Park: 42.2%, and Meagher: 29.6%.

Healthcare

As a state, Montana is lacking in an adequate amount of healthcare providers. In rural Montana, many must drive hundreds of miles to get medical care. Out of the state's 56 counties, 52 are defined as primary care shortage areas. Much of the low supply of providers can be attributed to a gap in rural communities. According to a new study published by Rand Corp, if you have private health insurance and receive care in a Montana hospital, you will pay an average of 2.77 times what Medicare pays - this is one of the highest markups of the 25 states in the study.

The U.S. Census Bureau reports the number of insured and uninsured people in the three county area of study. In 2017, approximately 87,780 Montana residents were uninsured (10.4%), which is slightly larger than the percent of uninsured individuals in Gallatin County in 2017 (8.2%). Meagher and Park Counties both had a similar percent of uninsured population to that of the State, with Meagher County having a rate of 11.6%, and Park having a rate of 10.1%. The national percentage of uninsured population in 2017 was 10.2%, which is similar to the uninsured rate in Gallatin and Park Counties. Meagher County had a slightly higher uninsured rate than the national average.

Mental Healthcare

Mental health needs surfaced as a top priority in the tri-county service area and state as a whole. Every county in the state of Montana is considered a mental health shortage area, except Yellowstone County. In 2017, Montana had the highest suicide rate in the country, with a rate of 29/100,000 compared nationally to a rate of 14/100,000. Montana's high suicide rate can be attributed to a myriad of factors such as: social isolation, lack of behavioral health services, stigma, access to lethal means, and low-socioeconimic status. Park County has the highest suicde rate in the state of Montana. In Montana, the youth suicide rate (ages 11-17) is 12.6/100,000, which is nearly triple the national rate for that same age group. According to the Gallatin County Community Health Assessment, there are a variety of factors that play into this growing need in our communities. One of the primary concerns in the area is a lack of affordable mental healthcare, including substance abuse services and inpatient psychiatric care. Compounding this factor is that many Montanans still associate a stigma to even basic mental healthcare.



ACCOMPANYING FIGURES

Population

Figure 1.

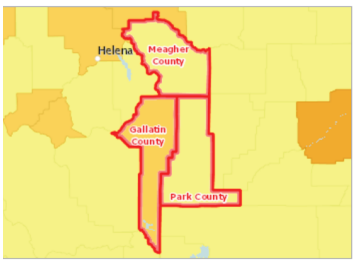
Population information for HRDC service area sourced from the US Census Bureau.

Report Area	Total Population	Total Land Area (Square Miles)	Population Density (Per Square Mile)
Report Location	118,734	7,799.34	15.22
Gallatin County, MT	100,733	2,604.99	38.67
Meagher County, MT	2,000	2,391.87	0.84
Park County, MT	16,001	2,802.48	5.71
Montana	1,029,862	145,545.42	7.08
United States	321,004,407	3,532,315.66	90.88

Data Source: US Census Bureau, American Community Survey. 2013-17. Source geography: Tract → Show more details

Figure 2.

Map of population density for Gallatin, Park, and Meagher Counties.



Population, Density (Persons per Sq Mile) by County, ACS 2013-17

- Over 500
- 101 - 500
- 51 - 100
- 11 - 50
- Under 11
- No Data or Data Suppressed
- Report Location

Figure 3.

Population breakdown by gender for HRDC service area.

Report Area	Male	Female	Percent Male	Percent Female
Report Location	61,023	57,711	51.39%	48.61%
Gallatin County, MT	52,057	48,676	51.68%	48.32%
Meagher County, MT	972	1,028	48.6%	51.4%
Park County, MT	7,994	8,007	49.96%	50.04%
Montana	517,860	512,002	50.28%	49.72%
United States	158,018,753	162,985,654	49.23%	50.77%

Employment

Figure 4.

Average monthly unemployment rate for HRDC service area from October 2018 - October 2019.

Average Monthly Unemployment Rate, October 2018 - October 2019

Report Area	Sep. 2018	Oct. 2018	Nov. 2018	Dec. 2018	Jan. 2019	Feb. 2019	Mar. 2019	Apr. 2019	May 2019	Jun. 2019	Jul. 2019	Aug. 2019	Sep. 2019	Oct. 2019
Report Location	2.2%	2.7%	3.1%	2.9%	3.4%	2.7%	2.7%	2.2%	2.2%	2.2%	1.7%	1.8%	2%	2.4%
Gallatin County, MT	2.1%	2.7%	2.9%	2.7%	3%	2.5%	2.5%	2.1%	2.2%	2%	1.6%	1.7%	1.9%	2.4%
Meagher County, MT	3.5%	3.5%	3.9%	3.6%	5.6%	4.6%	4.1%	3.1%	3%	2.8%	2.2%	2.1%	2.6%	2.9%
Park County, MT	2.9%	3.3%	4.5%	4.4%	5.8%	4.4%	4.4%	3.4%	2.8%	2.8%	2.2%	2.2%	2.4%	2.6%
Montana	3.1%	3.4%	3.6%	3.9%	5%	4.4%	4.2%	3.3%	2.8%	3.2%	2.8%	2.9%	3%	3.1%
United States	3.6%	3.6%	3.5%	3.7%	4.4%	4.1%	4%	3.4%	3.4%	3.9%	4%	3.8%	3.4%	3.4%

Education

Figure 5.

Rates of population over age 25 without a high school diploma in HRDC service area.

Report Area	Total Population Age 25+	Population Age 25+ with No High School Diploma	Percent Population Age 25+ with No High School Diploma
Report Location	77,236	2,640	3.42%
Gallatin County, MT	63,818	2,015	3.16%
Meagher County, MT	1,390	108	7.77%
Park County, MT	12,028	517	4.3%
Montana	703,919	49,444	7.02%
United States	216,271,644	27,437,114	12.69%

Note: This indicator is compared to the state average.

Data Source: US Census Bureau, American Community Survey. 2013-17. Source geography: Tract → Show more details

Education

Figure 6.

Average annual income and poverty information for HRDC service area.

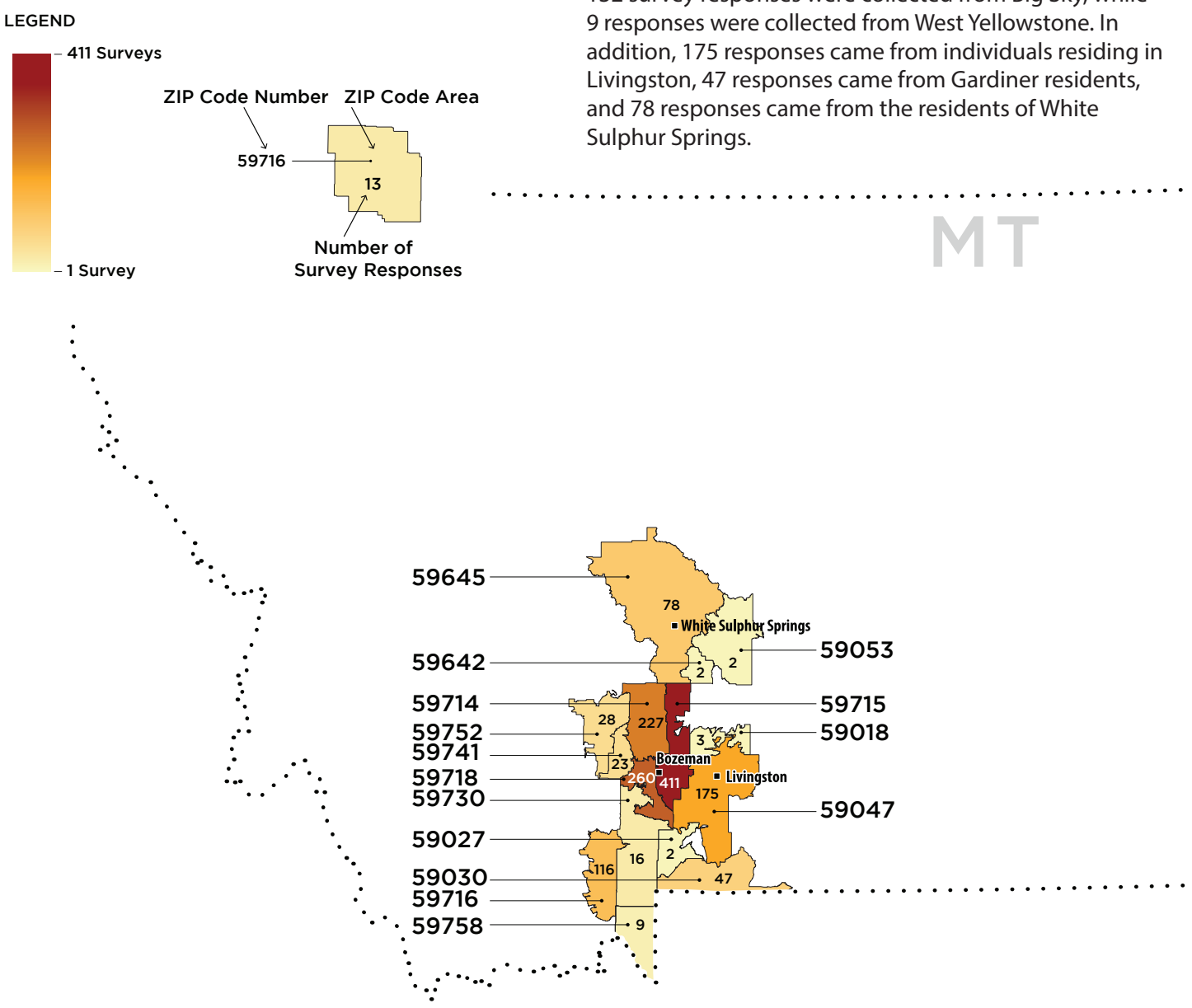
Income & Poverty	United States	Montana	Park County, Montana	Meagher County, Montana	Gallatin County, Montana
Persons in poverty, percent	⚠ 11.8%	⚠ 13.0%	⚠ 10.5%	⚠ 15.9%	⚠ 9.0%
PEOPLE					
Income & Poverty					
Median household income (in 2018 dollars), 2014-2018	$60,293	$52,559	$49,194	$43,109	$61,499
Per capita income in past 12 months (in 2018 dollars), 2014-2018	$32,621	$29,765	$32,133	$23,972	$34,331
Persons in poverty, percent	⚠ 11.8%	⚠ 13.0%	⚠ 10.5%	⚠ 15.9%	⚠ 9.0%

III. OVERALL SURVEY RESULTS

HRDC's Community Needs Assessment Survey received 1,451 total survey responses. The overall purpose of the survey is to assess community needs that will help inform our strategic plan which guides our work, prioritization, and resources over the next three years. Emerging trends from the overall results include strong responses regarding housing, mental healthcare, child care, healthcare, and transportation. General demographic data is illustrated on the right. The following section reports outcomes form the survey responses.

Geography

The majority of survey respondents were from two Bozeman-area zip codes of 59715 and 59718. These zip codes split the City of Bozeman into east and west halves and extends to the north of Gallatin County and includes the Four Corners community. This geography accounted for 668 responses, or about 46% of the total. The Belgrade zip code comprised 15.6% of the total survey responses, while Three Forks and Manhattan comprised approximately 3.5% of the total survey responses. Approximately 132 survey responses were collected from Big Sky, while 9 responses were collected from West Yellowstone. In addition, 175 responses came from individuals residing in Livingston, 47 responses came from Gardiner residents, and 78 responses came from the residents of White Sulphur Springs.



Demographics

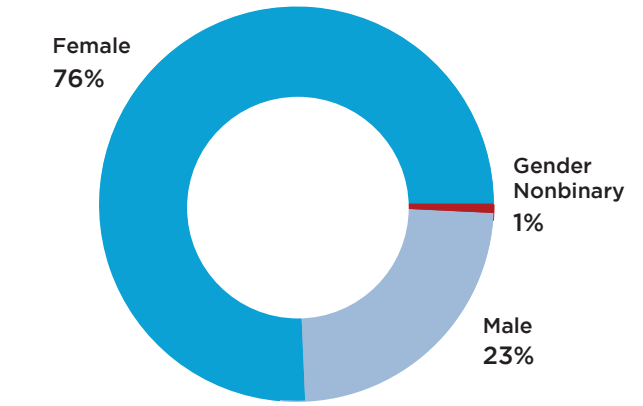
As part of our needs assessment process, we find it very useful to gather demographic data when administering our survey. This data is important in conjunction with HRDC customer data, as well as census estimates. Before administering our strategic plan, we need to ensure our needs assessment process gleaned an accurate snapshot of the communities we serve.

The age of survey respondents varied widely, with 16% of respondents being between the ages of 22-29, 26% between the ages of 30-39, 18% between the ages of 40-49, 15% between the ages of 50-59, and 15% between the ages of 60 and 69. Only 7% of all survey respondents were 70 or older and only 2% were between the ages of 18-21. The survey was administered to those over the age of 18. The respondents were overwhelmingly female (76%), and 61% were married or cohabitating with a partner. About 71% of respondents lived in a household with two or more adults present.

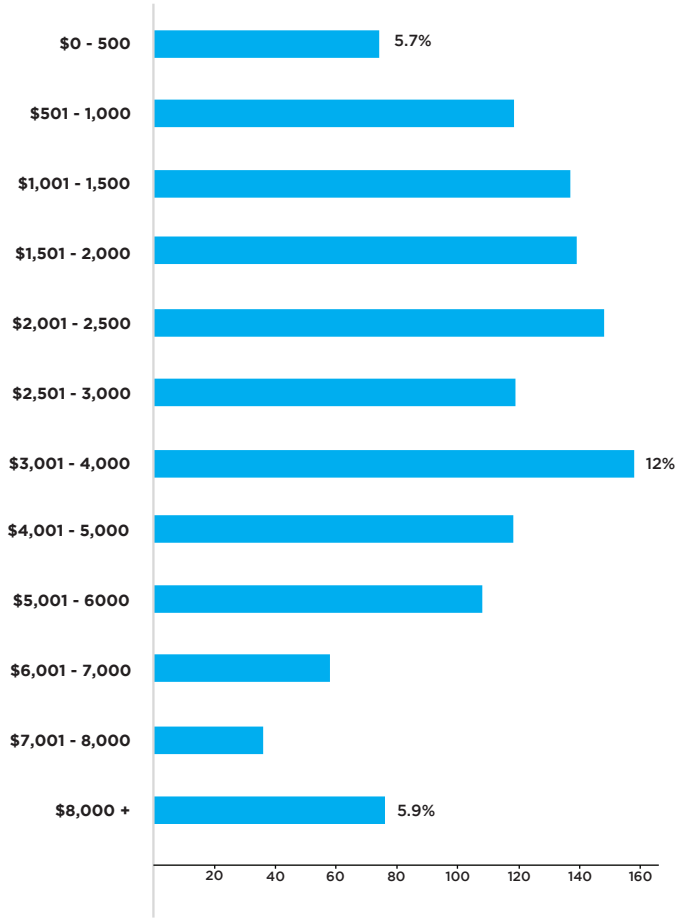
Respondents self-reported their monthly take-home pay. Results varied widely, with the largest majority of respondents making between $3,001 and $4,000 per month (12%). About 5.9% of respondents reported a monthly income of more than $8,000, while 5.7% reported a monthly income between $0 and $500.

Over half of survey respondents were employed full-time (defined in the survey as working at least 32 hours per week), while 11.2% were employed part-time, 13.6% were retired, 4.0% were unemployed but seeking employment, 2.4% were students, 3.5% were homemakers, and 5.4% were self-employed. Most respondents indicated that they work one job (54.37%), while 15.9% indicated they work two jobs, and 4.4% indicated they work three or more jobs. Approximately one fourth of respondents were not currently employed at the time of the survey. Out of all survey respondents, 9.6% indicated that they suffer from a disabling condition that prevents them from working.

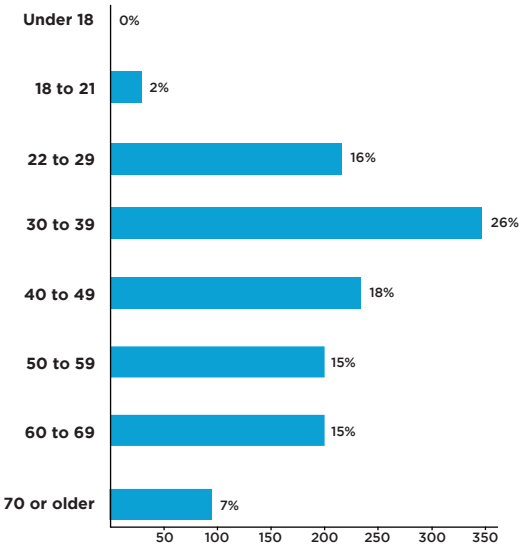
GENDER



HOUSEHOLD INCOME

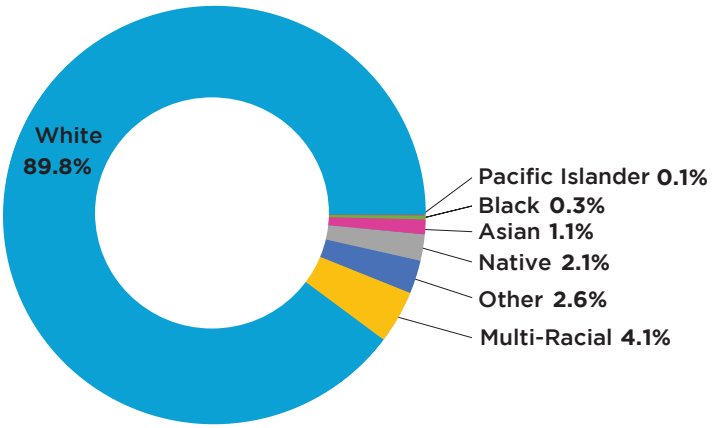


AGE



Race/Ethnicity

Of the 1,451 survey respondents, 1,318 reported their race/ethnicity. Of these, 1,183 respondents selected White/Caucasian (89.8%), 27 respondents selected American Indian/Alaskan Native (2.1%), 15 respondents selected Asian American (1.1%), 4 selected African American/Black (0.3%), 54 respondents selected multiple races (4.1%), and 34 selected other (2.6%). Native Hawaiaan/Pacific Islander was selected by one respondent (0.08%). Out of all survey respondents, 41 individuals identified as Latino or Hispanic (3.1%).



Housing

The perceived availability of housing, both for rent and purchase, was measured among respondents. Overall, 1,175 respondents selected housing as one of their top three categories of need that were causing the most difficulty in their communities (81.2%). Questions related to housing were framed from the lens of affordability and availability from the vantage point of both homeownership and home rental.

Furthermore, 1,308 respondents either disagreed or strongly disagreed that their community has a wide range of affordable housing options available (90.5%). Specifically with regards to rental availability, 1,339 respondents indicated that they disagreed or strongly disagreed that their community has many affordable places to rent (92.4%). Similarly, when asked about homeownership, 1,212 respondents disagreed or strongly disagreed that their community has many affordable homeownership opportunities (83.6%).

The top rental-related needs that were most selected by respondents include finding a place to rent (29.0%), paying rent (22.7%), heating/cooling costs (17.0%), and paying rental deposits (14.4%). Utility bill payment assistance and weather-proofing their home were the least selected responses for rental-related needs.

The top homeownership-related needs that caused the most difficulty for respondents in the past year include finding a home to purchase (20.9%), paying for home repair(s) (17.5%), making a down payment (17.0%), and paying for a mortgage (13.6%). Managing a foreclosure was the least selected response for home-ownership-related needs.

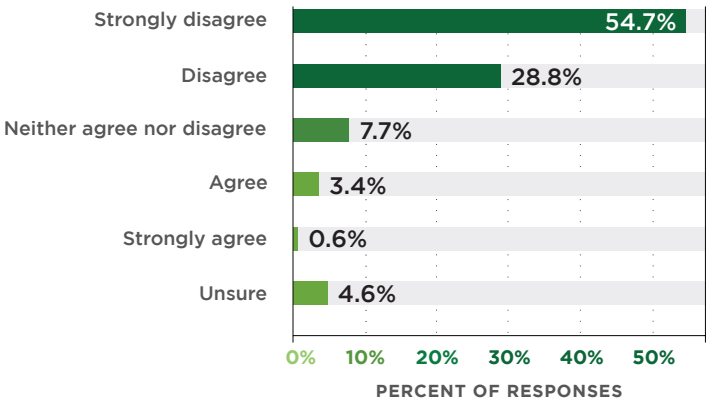
Mental Healthcare

Following housing, mental healthcare was the next most frequently selected need among all survey respondents, with 589 people indicating it as one of their top three perceived community needs (40.7%). Questions related to mental healthcare were framed from the vantage point of both availability of resources in specific communities.

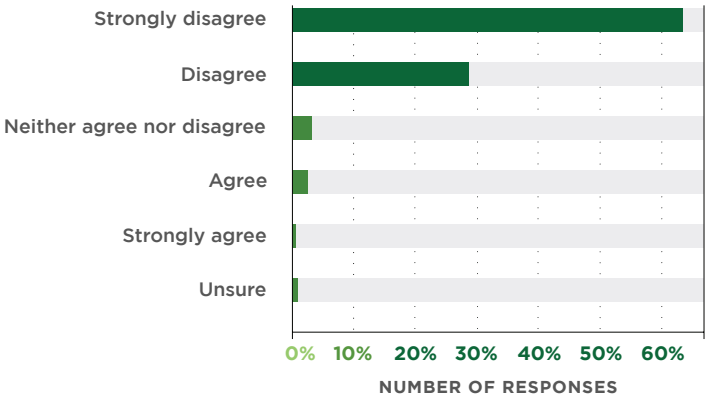
The perceived availability of children/youth mental health resources as well as adult mental health resources were

HOUSING

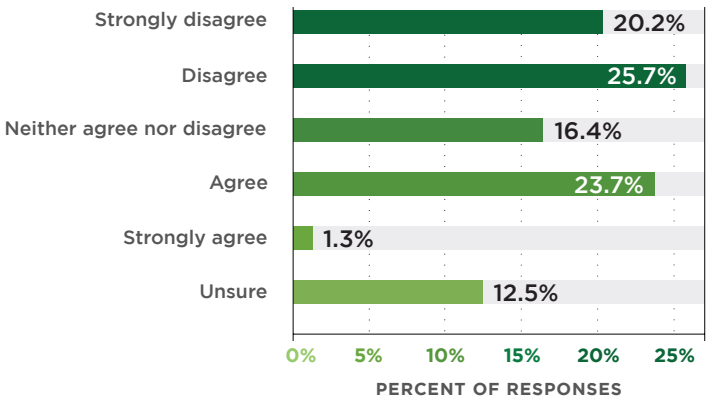
My community has many affordable home ownership opportunities.



My community has many affordable places to rent.



My community has resources available for those experiencing homelessness.



measured separately. A majority of respondents indicated that they disagreed or strongly disagreed that their community has adequate resources to meet the mental health needs of children and youth (53.3%). Similarly, 52.3% of respondents disagreed or strongly disagreed that their community has adequate resources to meet the mental health needs of adults.

The survey also evaluated which specific mental health need(s) caused the most difficulty for individuals and families in the past year. Anxiety was the most selected mental health challenge (46%), followed by depression (44.6%). PTSD was also frequently selected (14.1%), as was suicidal thoughts or ideation (11.7%). Eating disorders and dementia/memory-related disorders were the least selected mental health challenges by survey respondents.

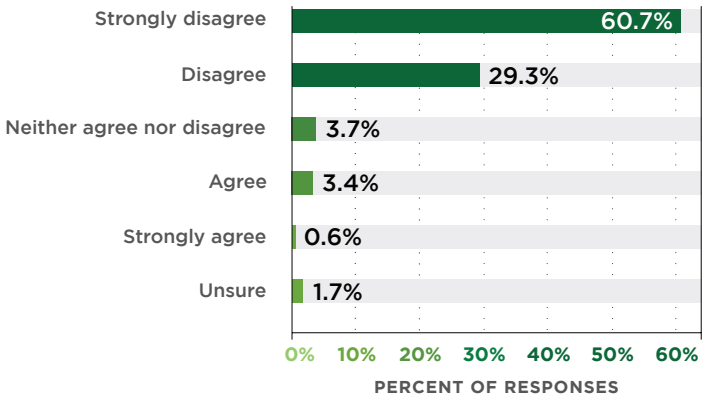
Child Care

Child care was the third most frequently selected perceived need by survey respondents in all geographic areas, with 490 individuals claiming it is one of their community's most pressing needs. Questions relating to child care were framed from the vantage of affordability and availability.

Availability and affordability were both assessed. Many survey respondents agreed or strongly agreed that their communities provide quality early childhood education (45.4%), while only 14.7% disagreed or strongly disagreed with that same statement. Many respondents selected "unsure" or "neither agree nor disagree" (39.8%). While the overall availability of early childhood education was perceived as moderate, many respondents indicated that child care is not affordable for all families. Specifically, 689 individuals said they disagreed or strongly disagreed that their communities have child care options for individuals and families of all income levels (47.5%). In comparison, 197 respondents indicated that they agreed or strongly agreed that child care is available for all income levels (13.6%).

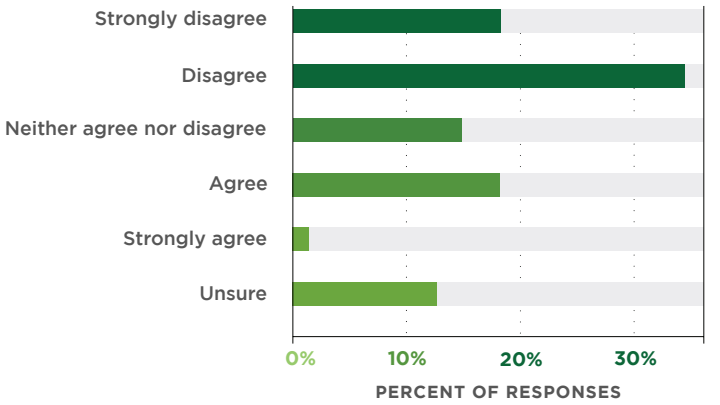
When asked about the specific child care-related need(s) that survey respondents experienced difficulty with in the past year, 1,020 individuals said they did not have any

My community has a wide range of affordable housing options available.



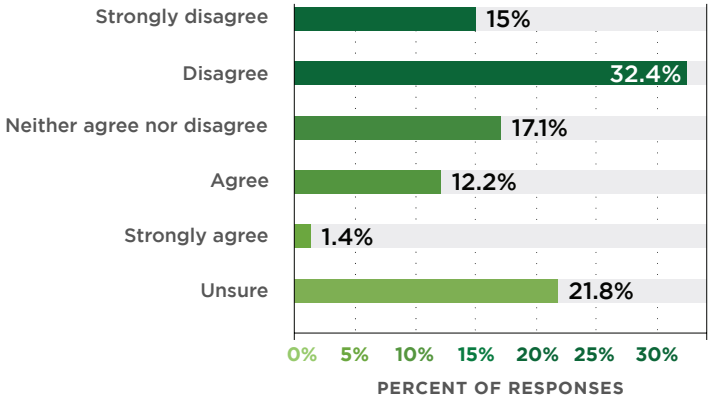
MENTAL HEALTH

My community has resources available for the mental health needs of adults.



CHILD CARE

My community has childcare options for individuals and families of all income levels.



difficulties (76.63%), while 185 respondents claimed they had difficulty finding adequate child care (13.9%) and 196 indicated they had difficulty paying for child care (14.7%).

Healthcare

In addition to housing, mental healthcare, and child care, general healthcare also surfaced as a top community need, with 448 survey respondents selecting healthcare as one of their community's most pressing issues (31.0%). Slightly more than half of survey respondents disagreed or strongly disagreed that their community has readily accessible, high-quality healthcare that is affordable for all income levels (50.7%), whereas only 24.7% of respondents agreed or strongly agreed.

While healthcare was the fourth most selected perceived community need, it was the most selected category of need that survey respondents had difficulty with in the past year (41.0%). When asked what specific healthcare related need respondents had difficulty with in the past year, paying for medical care was the most frequently selected response (33.4%), followed by paying for insurance premiums (25.7%) and access to dental care (17.7%). Access to general medical care was the least selected response (12.4%).

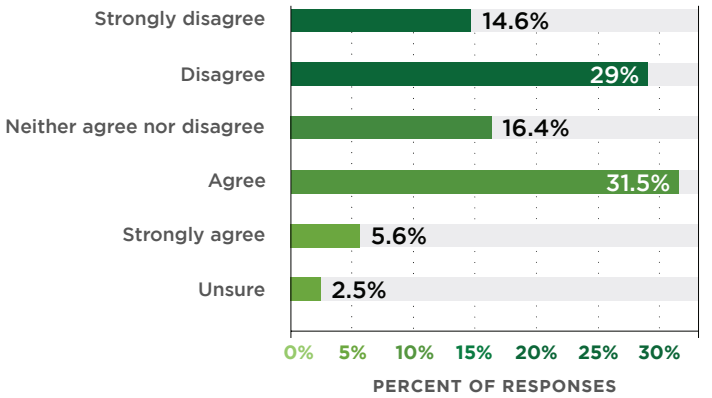
Transportation

Survey respondents identified transportation as the fifth most pressing need in their communities with a total of 287 respondents selecting it as one of their top three perceived community needs (19.8%). When asked specifically about public transportation, 43.8% of individuals said they disagreed that their community has sufficient public transportation options available. On the other hand, 37.3% of respondents agreed that their community has sufficient public transportation options available.

When asked about the specific transportation-related needs that caused them the most difficulty in the past year, 394 respondents selected paying for car repair(s) (29.2%). In addition to paying for car repair(s), many survey respondents also selected paying for insurance or registration (14.5%), accessing public transportation

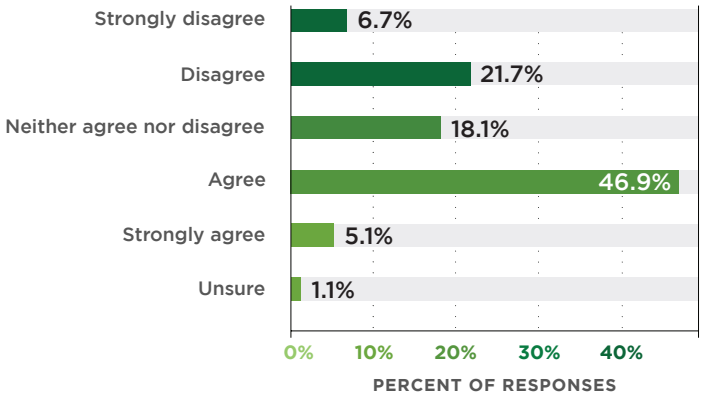
TRANSPORTATION

My community has sufficient public transportation options available.



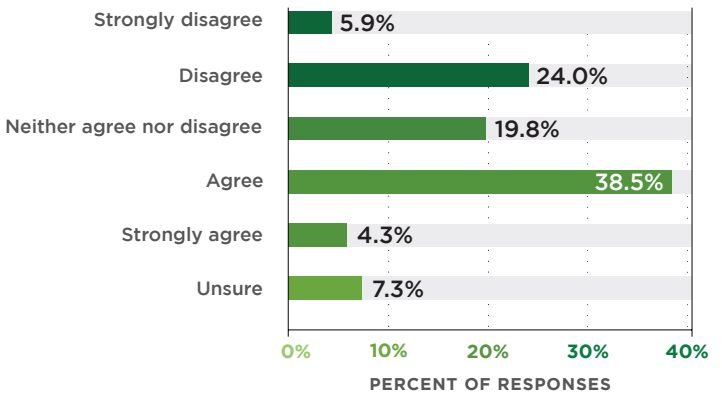
FOOD & NUTRITION

My community has affordable places to buy healthy food.

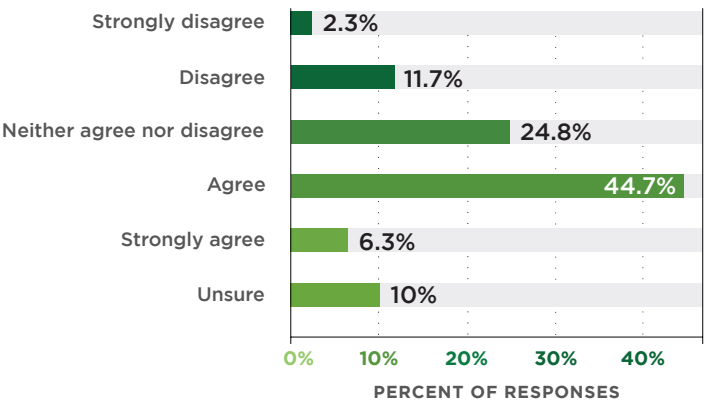


COMMUNITY

My community has numerous enrichment opportunities for people of all ages.



My community is welcoming and inclusive a public meetings and community events.



(14.4%), and making payments for a personal vehicle (12.1%). Assistance with car buying/car leasing and understanding how to use public transportation were the least selected responses.

Summary

Geographically, most respondents were from areas in the Bozeman/Belgrade area, with surveys received from nearly all zip codes in the tri-county area served by HRDC. With regards to demographics, survey respondents were primarily middle-aged, female, and White/ Caucasion. However, the survey did capture some other demographics such as Latinos and Hispanics. All income levels were well-represented in the survey.

As expected and consistent with our last needs assessment, housing surfaced as the number one need in every community in our tri-county service area. The exception being White Sulphur Springs where senior needs surfaced as the number one perceived need.

Also consistent with our previous Community Needs Assessment, child care and transportation continue to remain a priority need in our communities. Two emerging issues are the priority need of healthcare and mental healthcare.

IV. SCOPE OF STUDY

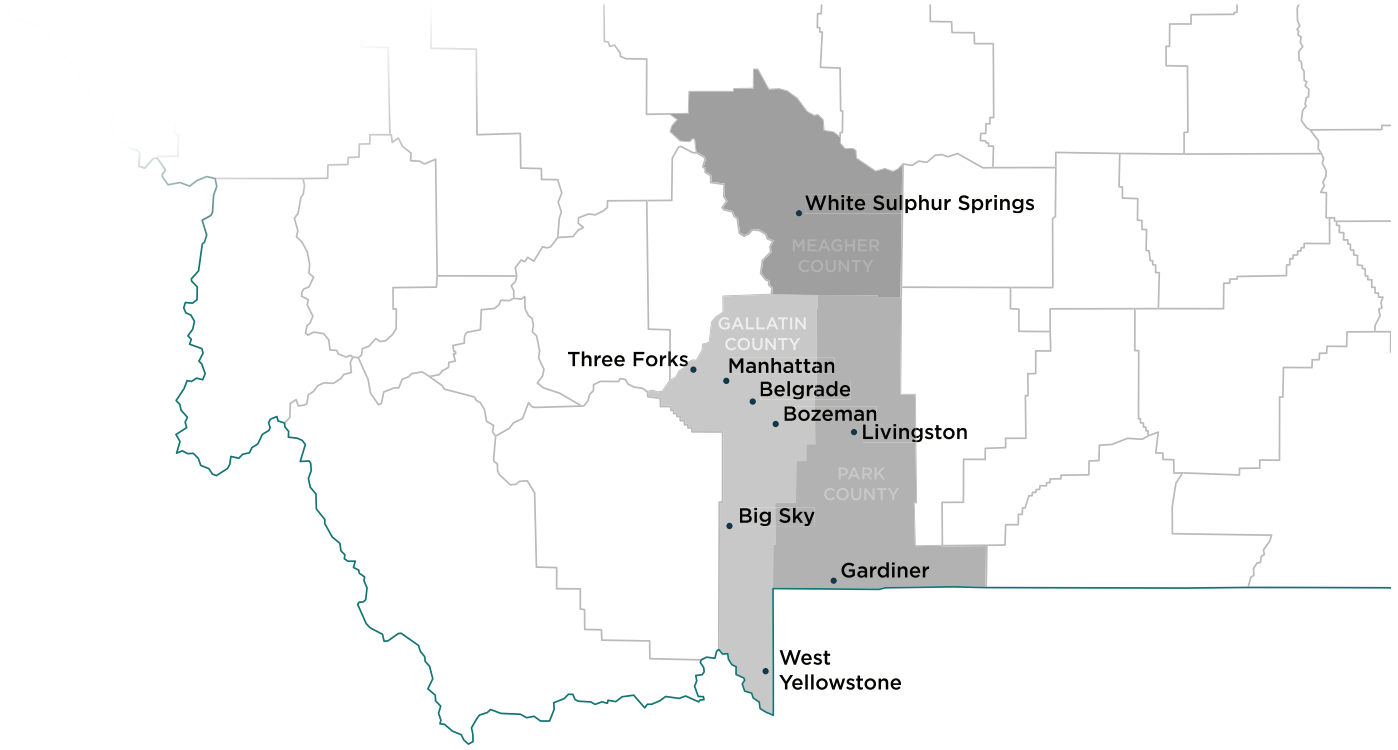
HRDC was established in 1975 and serves Southwest Montana. As a private, nonprofit Community Action Agency, the organization is dedicated to strengthening the community and advancing the quality of people's lives; both talent and capital, to help people of all ages and situations confront and overcome obstacles so they can improve their lives. HRDC focuses on seven strategic challenges and operates multiple programs and initiatives to address these pressing human needs. HRDC serves communities in seven areas: Food and Nutrition, Housing and Homelessness, Child and Youth Development, Senior Empowerment, Community Transportation, Home Heating (Efficiency and Safety), and Community and Economic Development. Through our programs and initiatives, we foster sustainable results with practical, comprehensive approaches to social and economic challenges.

HRDC exists to instill hope, develop resources, design solutions, and change lives. We envision a place where poverty has no impact because opportunity and quality of life are equally afforded to everyone.

HRDC includes the following communities:

- Belgrade
- Amsterdam/Churchill/Manhattan
- Logan/Three Forks/Willow Creek
- Four Corners/Gallatin Gateway
- West Yellowstone
- Livingston
- Gardiner/Cooke City/Silvergate
- Emigrant/PRay/Corwin Springs
- Clyde Park/Sedan/Wilsall
- Big Sky
- White Sulphur Springs/Martindale
- Bozeman

MAP OF HRDC SERVICE AREA



V. COMMUNITY NEEDS ASSESSMENT/OVERALL DATA

Survey Design

In an effort related to this Needs Assessment, a 68 question survey was created and sent to the public, customers, partners and interested parties for feedback related to what people feel are the most pressing needs facing their community. Our survey was a qualitative survey, utilizing a likert scale in order to determine perceived community needs by survey respondents. Along with seeking other general demographic data, this survey allowed for data to be collected across all economic indicators for a community. In total, 1,451 surveys were collected. In contrast, 840 surveys were collected in 2017 during our last needs assessment process. The information collected is presented by the community and as a whole for the region (Gallatin, Park, and Meagher Counties).

Customer Data

For the purposes of this needs assessment report, customer data represents demographic data from persons currently accessing any of HRDCs programs or services. The information included in this report is made up of three data sources: US Census data estimates for each community, demographics from the survey respondents, and demographics from HRDC customers in the specific community. We share our data in this form to highlight the connectedness of our customer base to the population that completed the survey.

Stakeholder Data

HRDC relies on more than 500 partners annually to continue to meet the needs of the community. These partners are considered important stakeholders in the planning process for HRDC. Stakeholder semi-structured interviews were conducted as part of this process to gain valuable insight into pressing needs for our community and what roles partners see value in HRDC pursuing to meet the community need. Surveys were distributed to partners from the private sector, local government, faith community, other local nonprofits and community organizations.



VI. ASSESSMENT METHODOLOGY

A variety of sources of published information were consulted in the preparation of this report. In order to complement the research quality of this Community Needs Assessment, some of the referenced data has been included. Detailed citations are included. HRDC is not responsible for any misleading or inaccurate data provided by these sources.

Multiple methods were employed to ensure the quality and diversity of data, including:

A survey instrument of 68 questions distributed via paper and digital formats. The survey was sent to community residents and partners and was hosted online for several months to reach the broadest population possible.

Community forums with community members, program participants, and representatives from local social service providers and partners

- Stakeholder interviews
- A data set representative of HRDC customers
- US Census Bureau estimates
- Anecdotal evidence

It is noted that each of the above methods were carried out using purposeful, convenience sampling techniques. A convenience sample surveys individuals by chance. There is no way to guarantee representativeness. By comparing the demographics of those who participated with the larger population (those who did not participate) no significant differences were found. It is noted in the demographic comparison, the data collected from the survey participants is from 2019 while HRDC customers data comes from 2018. Descriptive statistics methods were chosen to analyze data within each community.

Surveys were analyzed as a whole in the overall results section, while each individual community was analyzed using the zip code as the primary geography. Geographic information systems were used to combine geographies where a community spanned across several zip code tabulation areas. The stakeholder interviews were done by community, not zip code.

This assessment process exhibits both flexibility and richness of data that could not have been achieved by other sampling techniques (e.g. random, stratified, proportionate). Accordingly, HRDC's community needs assessment acknowledges concerns dealing with the ability to make inferences from the results of this assessment to the general population. However, given the changing nature of demographic, economic, and social conditions in local communities, this assessment illustrates a representative, living document which places value on actual experiences and stories of respondents as much as on facts, figures, and statistics.



VII. OVERALL PRIORITY NEEDS IN-DEPTH ANALYSIS

A. Housing

Housing Survey Results:

The perceived availability of housing, both for rent and purchase, was measured among respondents. Overall, 1,175 respondents selected housing as one of their top three categories of need that were causing the most difficulty in their communities (81.2%). Furthermore, 1,308 respondents either disagreed or strongly disagreed that their community has a wide range of affordable housing options available (90.5%). Specifically with regards to rental availability, 1,339 respondents indicated that they disagreed or strongly disagreed that their community has many affordable places to rent (92.4%). Similarly, when asked about homeownership, 1,212 respondents disagreed or strongly disagreed that their community has many affordable homeownership opportunities (83.6%). The top rental-related needs that were most selected by respondents include finding a place to rent (29.0%), paying rent (22.7%), heating/cooling costs (17.0%), and paying rental deposits (14.4%). Utility bill payment assistance and weather-proofing their home were the least selected responses for rental-related needs.

The homeownership-related needs that caused the most difficulty for respondents in the past year include finding a home to purchase (20.9%), paying for home repair(s) (17.5%), making a down payment (17.0%), and paying for a mortgage (13.6%). Managing a foreclosure was the least selected response for homeownership-related needs.

Supplemental Source, Housing Data:

Throughout HRDC's Needs Assessment process, housing needs were discovered as a very pressing issue in each community. The largest impacts of the regional population growth seem to be on a community's infrastructure, particularly housing affordability and availability. In Gallatin County alone, 50% of the population is paying over 50% of their income to afford housing in the area.

A cost burdened household is defined as a household that spends over 30% of its monthly income on housing costs. In Gallatin County, 13,523 out of 40,723 households are considered cost burdened, summing up to 33%. Within Park County, 2,306 of 7,552 (31%) households are considered cost burdened. In Meagher County, 216 of 777 (28%) of households are considered cost burdened. These numbers for the tri-county area are staggering when compared to the state average (27.87% cost burdened households). Only Meagher County, where housing quality and availability is a larger issue, has a comparable cost burdened percentage.

According to the Montana Economic Report, gross rents across the state have increased by 26%, compared with the US rate of 16%. The vast majority of this growth has been concentrated in a few areas of the state, including the area served by HRDC, which has experienced the most significant increases in housing costs. Additionally, housing costs have outpaced household income increases. From 2000 to 2017, median wages in Gallatin County have increased by 26%, while median rents have increased by 71%.

	Mean renter wage	Affordable rent at mean renter wage	Fair market rent 2BR	Difference between market and affordable	Hours needed at median wage to afford median 2BR
Gallatin	$12.78	$655	$898	$243	54/week
Meagher	$12.46	$648	$704	$56	43/week
Park	$12.92	$672	$863	$191	51/week

In most markets, owning a home is both less expensive than renting, and more stable. However, for households hoping to secure stability and build equity through homeownership, making the jump from renter to homeowner has become increasingly difficult. Since 2012, prices have increased by an average 10% annually across all unit types. In 2019, the median sales price of a single-family home in Bozeman climbed to $460,000, which is affordable to a household earning approximately $120,000 annually. The median sales prices of a Condominium in 2019 was $320,000, affordable to a household earning approximately $85,000 annually.

Both of these household earnings, qualifying you for both local rental prices and local housing stock prices are not the reality for the overwhelming majority of residents in Gallatin county. Majority of residents in our community do not meet the minimum household income to qualify for either of these options, making housing costs and rental costs unaffordable to most that live in our community.

According to the National Low Income Housing Coalition, nationwide and on average, for every $100 increase in median rent in our community, there is a 15% increase in our homeless population.

Senior Lens

Poverty is a common thread among seniors across the country and southwest Montana is no exception. According to the United States Census in 2013, 8% of seniors (age 65 and older) in Park and Gallatin Counties are living below poverty level. The chart below reflects what the federal government and Gerontology Institute recommend as the amount of income needed for food, housing, healthcare and transportation.

100% Federal Poverty Level = $1063/month

150% Federal Poverty Level = $1,595/month

***Elder Index: = $1816/month**

For seniors earning fixed incomes, there are a limited number of rental homes available. According to the City of Bozeman's recent Needs Assessment, rentals designated for senior households earning under 30% AMI (approximately $18,000 for a household of one) have waiting lists in excess of 2 years, with an approximate turnover of 5% per year. Renters in Park and Meagher Counties face similar obstacles. For households receiving an average Social Security payment of $1500/month, the ability to secure housing may determine their ability to remain in the community they call home.

Youth Lens

The 2019 point in time survey suggested there were up to 120 youth experiencing homelessness in our community. Many of them may not be self identifying as homeless due to the fact they may be staying with friends, extended family, or sleeping in cars. Some live within the support of a homeless family unit; we had homeless children in elementary, middle and high school across the valley at some point. Up to 34 minors were identified as unaccompanied, meaning they had no adult responsible or willing to advocate for them. For those homeless youth in Gallatin County, who are 18+ or living within a family unit, there are several shelter options available: the Warming Center, Family Promise, and HAVEN.

For unaccompanied minors, typically these shelter options are not accessible to them. Homelessness has implications on a youth's ability to finish school, especially if they are also working to feed, clothe and potentially house themselves, leaving them with additional barriers to becoming an independent adult.

Blueprint is the only shelter and transitional housing option in the Valley, with a capacity of up to five youth. Time to move through the program varies depending on their education and work setting which has long term implications on how many youth can be served by the program. Since November 2015, 38% of program participants have been unaccompanied minors, of which 44% have been male and 56% female. 19% self-identify as LGBTQ, 94% have reported some form of abuse (physical, emotional, sexual) and 44% have experienced the foster care system. With 16% of children living on or below the poverty line in 2019, the impact of limited affordable housing is large.

B. Mental Healthcare

Mental Health Care Survey Results:

Following housing, mental healthcare was the next most frequently selected need among all survey respondents, with 589 people indicating it as one of their top three perceived community needs (40.7%). The perceived availability of children/youth mental health resources as well as adult mental health resources were measured separately. A majority of respondents indicated that they disagreed or strongly disagreed that their community has adequate resources to meet the mental health needs of children and youth (53.3%). Similarly, 52.3% of respondents disagreed or strongly disagreed that their community has adequate resources to meet the mental health needs of adults.

The survey also evaluated which specific mental health need(s) caused the most difficulty for individuals and families in the past year. Anxiety was the most selected mental health challenge (46%), followed by depression

(44.6%). PTSD was also frequently selected (14.1%), as was suicidal thoughts or ideation (11.7%). Eating disorders and dementia/memory-related disorders were the least selected mental health challenges by survey respondents.

Supplemental Source, Mental Healthcare Data:

Mental health needs has surfaced as top priority needs in the tri-county service area and state as a whole. Every county in the state of Montana is considered a mental health shortage area, except Yellowstone County. In 2017, Montana had the highest suicide rate in the country, with a rate of 29/100,000 compared nationally to a rate of 14/100,000. Montana's high suicide rate can be attributed to a myriad of factors such as: social isolation, lack of behavioral health services, stigma, access to lethal means, and low socioeconimic status. Park County has the highest suicde rate in the state of Montana. In Montana, the youth suicide rate (ages 11-17) is 12.6/100,000, which is nearly triple the national rate for that same age group. According to the Gallatin County Community Health Assessment, there are a variety of factors that play into this growing need in our communities. One of the primary concerns in the area is a lack of affordable mental health care, including substance abuse services and inpatient psychiatric care. Compounding this factor is that many Montanans still associate a stigma to even basic mental health care.

According to the 2017 Bozeman Health Needs Assessment, 14.3% of their surveyed area indicated they believe their mental health to be "fair" or "poor". Women (40-64), low-income residents, and respondents of other or unknown races were much more likely to report experiencing "fair/poor" mental health than other demographics surveyed. Over 23.7% of total area adults have been diagnosed with a depressive disorder. 4.6% of area adults reported there was a time in the past year where they needed mental health services but weren't able to get them.

Senior Lens

Seniors face unique sets of mental health challenges as they move through the aging process brought on by multiple factors including retirement, relocation, health changes, and loss of friends and loved ones. Not surprisingly, the unique challenges seniors encounter increase risk for depression, anxiety, and other behavioral health concerns. Research suggests that seniors under-utilize behavioral health services for many reasons including lack of access, stigma and shame.

According to the 2018 Gallatin County Community Health Assessment, the budget cuts enacted in 2017 and early 2018 underscored the foundational problems with Montana's mental health system. In early 2018, Park County's Gallatin Mental Health Center announced it would discontinue its operations in the county. Budget cuts within the Montana Medicaid system have caused some providers to shut down operations altogether. Livingston's closure of its Mental Healthcare Center in April 2018 had profound effects on their community, leaving nearly 100 patients to find care elsewhere. Western Montana Mental Health management attributes office closures and staff reductions to sweeping budget cuts initiated by the Montana Legislature that have severely impacted the rates at which Montana providers are paid for serving Medicaid clients. The reductions are affecting an array of services, including adult case management, outpatient therapy, and day treatment.

Youth Lens

The youth suicide rate is nearly double the national average, speaking to the mental health challenges currently being expereinced by youth both in Gallatin and Park counties.

In 2019 there were 22 deaths per 100,000 adolescents aged 15-19 in Montana. There is an alarming contrast based on gender, for males this number is 34 deaths in 100,000 adolescents, for females it is 5 in 100,00. These numbers have increased steadily since 2016 and sharply contrast the national average of 10.5 youth per 100,000 across the United States.

LGBTQ youth are nearly four times more likely to attempt suicide as their straight peers. And LGBTQ youth who come from highly rejecting families are 8.4 times as likely to have attempted suicide as LGBTQ peers who

reported no or low levels of family rejection. Each episode of LGBTQ victimization, such as physical or verbal harassment or abuse, increases the likelihood of self-harming behavior by 2.5 times on average.

We can attribute these outcomes to a myriad of factors. Social isolation is high in the state of Montana, with an average of 6.7 people per square mile, compared to the national average of 88.6 people per square mile. Additionally, there is a lack of psychiatrists and integrated behavioral health services for the specific needs of youth. Most importantly, there is a stigma associated with depression in Montana as a whole, specifically in rural communities. This stigma leads to further isolation.

While the local and state government cuts to the health department budget has led to rural mental health care programs being closed and mental health professionals being laid off, there are several options for youth in Bozeman to access free or tiered mental health services, provided by CHP and Providence Mental Health. Transport and stigma are two real barriers to these services being accessed to their full potential. There are also attempts to combat this growing need with plans for a statewide coordinated data-driven suicide prevention effort that empowers local communities.

C. Child Care

Child Care Survey Results:

Child care was the third most frequently selected perceived need by survey respondents in all geographic areas, with 490 individuals claiming it is one of their community's most pressing needs with availability and affordability both assessed. Many survey respondents agreed or strongly agreed that their communities provide quality early childhood education (45.4%), while only 14.7% disagreed or strongly disagreed with that same statement. Many respondents selected "unsure" or "neither agree nor disagree" (39.8%). While the overall availability of early childhood education was perceived as moderate, many respondents indicated that child care is not affordable for all families. Specifically, 689 individuals said they disagreed or strongly disagreed that their communities have child care options for individuals and families of all income levels (47.5%). In comparison, 197 respondents indicated that they agreed or strongly agreed that child care is available for all income levels (13.6%).

When asked about the specific child care-related need(s) that survey respondents experienced difficulty with in the past year, 1,020 individuals said they did not have any difficulties (76.63%), while 185 respondents claimed they had difficulty finding adequate child care (13.9%) and 196 indicated they had difficulty paying for child care (14.7%).

Supplemental Source, Child Care Data:

Child care continues to surface as a priority need in our service area. According to an article in the Bozeman Daily Chronicle, Gallatin County only has the capacity to care for 33% of its children under the age of five. The cost of this child care for two young children tops out at nearly 21% of the median household family income.

According to Childcare Connections, Gallatin County has a shortage of 67% in licensed child care, followed by 65% in Meagher County and 62% in Park County. Ultimately this leaves numerous families with illegal or potentially unsafe options for their child care. Montana is one out of five states that fails to meet even half of the potential need for child care. This means that over 25,000 children under the age of six are in unregulated child care in Montana, that means nearly 56% of children are in need of care. Child care is deemed affordable if it costs 7% or less per household. In our tri county service area, Gallatin county spends over 31% of their income on child care for an infant and a toddler. Similarly, the rates for the same scenario and Meagher and Park County are 43% and 39%, respectively.

This cost breaks out as roughly $9,518 annually per infant (ages 0-2), and $8,364 annually per child (ages 3-5). In Montana as a whole, a typical family pays 16.5% of their annual income for child care for one child. Infant care on the other hand can cost a parent, making minimum wage, nearly 28 weeks worth of pay. This is extremely important because it is estimated that nearly 42% of single mothers with children (ages 0-5) have an annual income of $17,000 or less.

The high costs and lack of child care options in our

service area has trickle down effects to virtually all facets of our community. Of Montanas unemployed sector, 42% state that family responsibility as the reason they are unable to work. 23% of part time workers in Montana are unable to work full time due to lack of affordable child care options. If we were able to meet our child care needs in Gallatin county nearly 27% of mothers would be able to then participate in the workforce. That rate is similar in Park County with 25% of mothers returning to the workforce and 26% in Meagher County.

Senior Lens

13,385 (6%) of children under the age of 18 live with grandparents. Of the 7540 grandparents responsible for their grandchildren, 4381 (58.1%) are in the workforce, 1448 (19.2%) are in poverty, and 1998 (26.5%) have a disability.

D. Healthcare

Healthcare Survey Results:

In addition to housing, mental healthcare, and child care, general healthcare also surfaced as a top community need, with 448 survey respondents selecting healthcare as one of their community's most pressing issues (31.0%). Slightly more than half of survey respondents disagreed or strongly disagreed that their community has readily accessible, high-quality healthcare that is affordable for all income levels (50.7%), whereas only 24.7% of respondents agreed or strongly agreed.

While healthcare was the fourth most selected perceived community need, it was the most selected category of need that survey respondents had difficulty with in the past year (41.0%). When asked what specific healthcare related needs respondents had difficulty with in the past year, paying for medical care was the most frequently selected response (33.4%), followed by paying for insurance premiums (25.7%) and access to dental care (17.7%). Access to general medical care was the least selected response (12.4%).

Supplemental source, Healthcare Data:

As a state, Montana is lacking in an adequate amount of healthcare providers. In rural Montana, many must drive hundreds of miles to get medical care. Out of the state's 56 counties, 52 are defined as primary care shortage areas. Much of the low supply of providers can be attributed to a gap in rural communities. According to a new study published by Rand Corp, if you have private health insurance and receive care in a Montana hospital, you will pay an average of 2.77 times what Medicare pays - this is one of the highest markups of the 25 states in the study.

The U.S. Census Bureau reports the number of insured and uninsured people in the three county area of study. In 2017, approximately 87,780 Montana residents were uninsured (10.4%), which is slightly larger than the percent of uninsured individuals in Gallatin County in 2017 (8.2%). Meagher and Park counties both had a similar percent of uninsured population to that of the State, with Meagher County having a rate of 11.6%, and Park having a rate of 10.1%. The national percentage of the uninsured population in 2017 was 10.2%, which is similar to the uninsured rate in Gallatin and Park Counties. Meagher county had a slightly higher uninsured rate than the national average.

Senior Lens

According to 2017 Gallatin, Madison and Park Counties Community Health Needs Assessment, 75.5% of the key informants taking part in an online survey most often characterized "Lack of Services for Senior" as a moderate or major problem. The three top concerns were access to care/services, transportation and affordable care/services.

Youth Lens

Young adults (aged 18–25 years) in Montana rank among the highest nationwide for alcohol use disorder (14%) and alcohol dependence (6%) and upto 23% of high school students are using electronic cigarettes. The most commonly reported barriers to youth (nationwide) accessing health care are lack of transport (27.2%), lack of insurance (23.3%), and cost (22.8%).

In rural communities there have been additional psycho-social barriers identified including the lack of anonymity in close community, and providers bias, practices and behaviours

There are some free and open to all health care providers accessible to youth, such as Bridger Care, Zoe Care, CHP, however the transportation, education and psychosocial barriers such as confidentiality need to be addressed for youth to engage in these services.

E. Transportation

Transportation Survey Results:

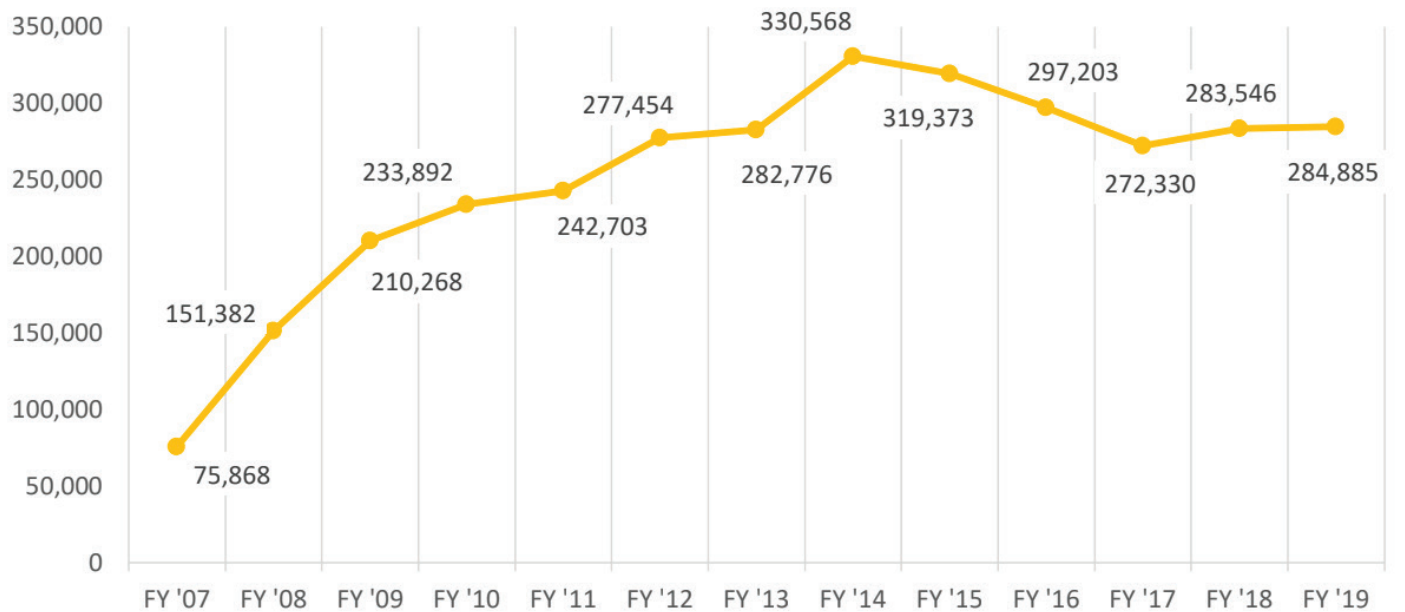
Survey respondents identified transportation as the fifth most pressing need in their communities with a total of 287 respondents selecting it as one of their top three perceived community needs (19.8%). When asked specifically about public transportation, 43.8% of individuals said they either disagreed or strongly disagreed that their community has sufficient public transportation options available. On the other hand, 37.3% of respondents either agreed or strongly agreed that their community has sufficient public transportation options available.

When asked about the specific transportation-related needs that caused them the most difficulty in the past year, 394 respondents selected paying for car repair(s) (29.2%). In addition to paying for car repair(s), many survey respondents also selected paying for insurance or registration (14.5%), accessing public transportation (14.4%), and making payments for a personal vehicle (12.1%). Assistance with car buying/car leasing and understanding how to use public transportation were the least selected responses.

Supplemental Source, Transportation Data:

Transportation accounts for 9.7% of income in Montana, compared to the US average of 7.4%. Streamline is the primary transit service for residents and visitors of Bozeman, MT and surrounding communities. Bozeman is the county seat of Gallatin County, the third largest county in the state and the fastest growing, by far. Streamline offers a fare-free fixed-route transit service in the City of Bozeman and commuter service to Belgrade, Four Corners, and Livingston. Streamline also provides

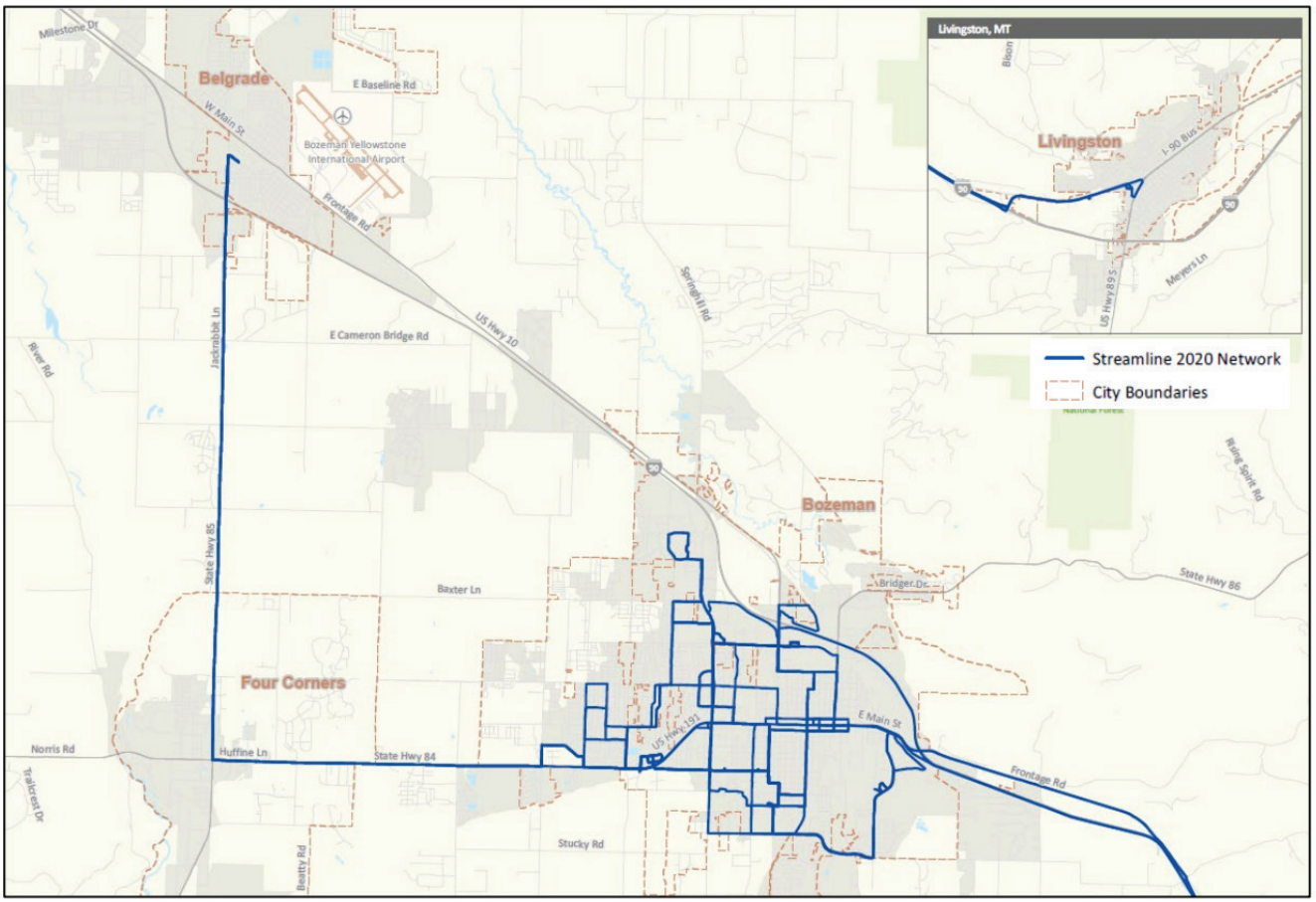
ANNUAL STREAMLINE RIDERSHIP BY FICSCAL YEAR



seasonal service on weekends to the Bridger Bowl Ski Area and partners with Montana State University to operate two late-night routes and campus shuttle service. Streamline operates four routes locally within Bozeman Monday through Saturday, one express route (Greenline Express) operates weekdays between Bozeman and Belgrade and the second express route connects Livingston to Bozeman on weekdays. Sunday service only operates in Bozeman and is provided by a single route. LateNight service is provided by two routes within Bozeman Thursday through Saturday from 8 p.m. until 2:30 a.m. An intra-campus shuttle has been inaugurated on the MSU campus during the current semester. This operates on weekdays that MSU is in session.

Bozeman, Montana is one of the fastest-growing micropolitan areas in the country. After the 2020 U.S. Census is fully processed, the population of Bozeman will likely surpass 50,000. This number is an important threshold in Federal Transit Administration (FTA) formula funding, changing Bozeman's classification from rural to a small urbanized area, impacting grant eligibility. The Streamline routes and network design have not had a major evaluation and update since the system started in 2006. With such rapid population growth and potential changes to funding, Streamline launched Redesign Streamline 2020 to evaluate existing service and rethink Streamline service for the future. The first step of Redesign Streamline 2020 is a study of existing service and market conditions, the findings of which are detailed in this report. With the existing conditions analysis complete, the next step will be developing service strategies and recommendations, which will be vetted by the public outreach process and Streamline Board. Ultimately, the project will culminate in a transit

REDESIGN STREAMLINE 2020 STUDY AREA



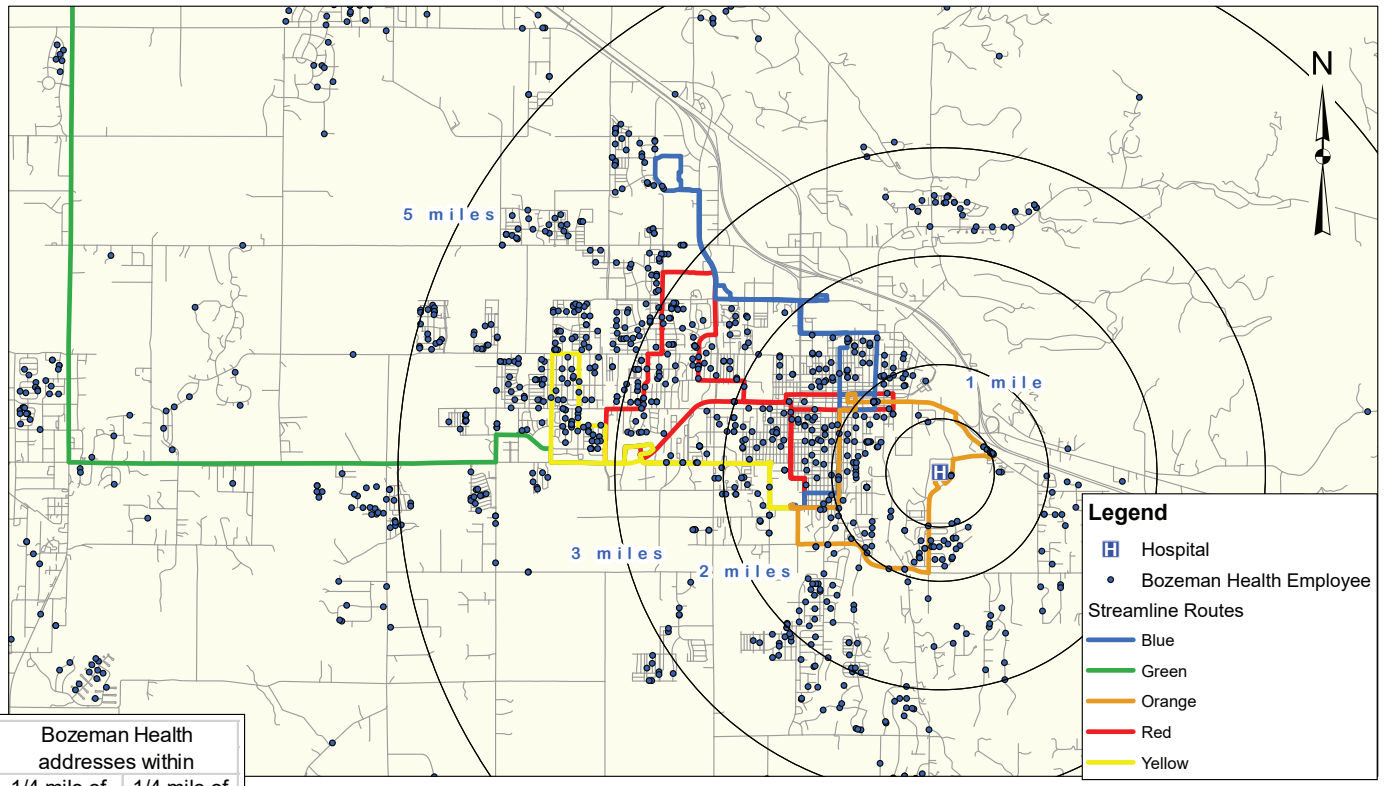
development plan that solidifies the final service recommendations and provides implementation guidance.

The recent Downtown Improvement Plan highlights the incorporation of public transit in future planning: Moving forward, Bozeman should expand public transit services to places that link to downtown, surrounding neighborhoods, and other city districts. Bozeman's Streamline serves Downtown with multiple lines and a multi-modal stop at the Bridger Park Garage. However, new needs of growing daytime employees and new growth patterns have created an opportunity to tailor the routes to help offset parking demand, lessen affordability burdens on those who work in Downtown, link users to parking resources, and better connect the districts around Downtown. They recommend the following strategies: create a downtown circulator with a park-and-ride link, strengthen connections to anchors, provide a mix of transit options. Over half of the participants who took the "Imagine a more Inclusive Downtown " survey believe the best strategy to link housing and transit to Downtown will be through a Streamline service that is safe and accessible to the public, based on 409 responses to an online survey.

The most recent Community Health Needs Assessment cited access issues related to transportation: wherein 13% of Bozeman Health customers addresses are within ¼ mile of an Orange Line stop and 32% are within ¼ mile of any Streamline stop

Because the population of Gallatin county is experiencing immense growth and development, considerable change is occurring in the valley. The "Triangle Area" of Gallatin county is defined as Bozeman, Four Corners, and

TRANSIT ACCESSIBILITY OF BOZEMAN HEALTH EMPLOYEES



Bozeman Health addresses within	
1/4 mile of All Stops	1/4 mile of Orangeline
572	229
32%	13%

Bozeman Health
Transit Access Mapping

Belgrade respectively. The Triangle Community Plan was published in January 2020 by the Planning Coordinator Committee (PCC) to coordinate and implement land use development patterns, community services and infrastructure and protect environmental resources all with the rapid growth of the area at the forefront of mind. Priorities listed by the PCC for transportation also include non-motorized transportation systems. These priorities include focusing heavily on neighborhood trails, connector trails, and commuter pathways emphasizing the importance of connecting each community to one another. Trails additionally add immense value to private lands with more property owners desiring a more connected neighborhood and community.

The triangle community plan highlights the following transportation needs/goals related to public transit and mobility:

Its overall goal is to provide an efficient transportation system for all users through the following strategies: Discourage development in areas without access to major transportation network as identified in the most recent version of the transportation plans adopted by Belgrade, Bozeman, and Gallatin County; Plan for multi-modal transportation facilities that offer a variety of choices for different users and purposes; Support efforts to develop a separated bike-pedestrian path along Huffine from Bozeman to Four Corners, along 191 south of Four Corners, along the Frontage Road from Belgrade to Bozeman, and along major arterials as appropriate; Support efforts to develop and incorporate design standards on Huffine, Jackrabbit, 191, Frontage roads, and all arterial roads in the Triangle area that provide safe conditions for all road users, including pedestrians, cyclists, motorists, transit users and farmers operating equipment; Plan for multi-modal transportation facilities that offer a variety of choices for different users and purposes

Youth Lens

Transportation continues to be a major challenge for youth in Bozeman, particularly low income youth without family support or the means to pay for drivers ed, practice driving or purchase a vehicle.



VIII. COMMUNITY PROFILES AND THE COMMUNITY'S VOICE

The Community Needs Assessment Survey was oriented to collect the largest amount of information possible from public sources. The primary method of gathering this information was a survey instrument designed to be distributed through both digital and hardcopy formats to the largest group of public participants, potential stakeholders, or otherwise interested parties as possible. The survey was hosted online for several months and was sent to all potential email recipients, and included incentives for completion.

Over the period the survey was administered, 1,451 surveys were received from a large geographic and demographic area.

This report profiles HRDC's tri county service area of Gallatin, Park and Meagher counties- broken down by community. Each community profile includes:

Community Demographics

Broken down by census estimates, HRDC customer demographics, and survey demographics.

Community Conditions

A brief description of the community and recent trends and challenges encountered by its inhabitants.

Top Perceived Needs

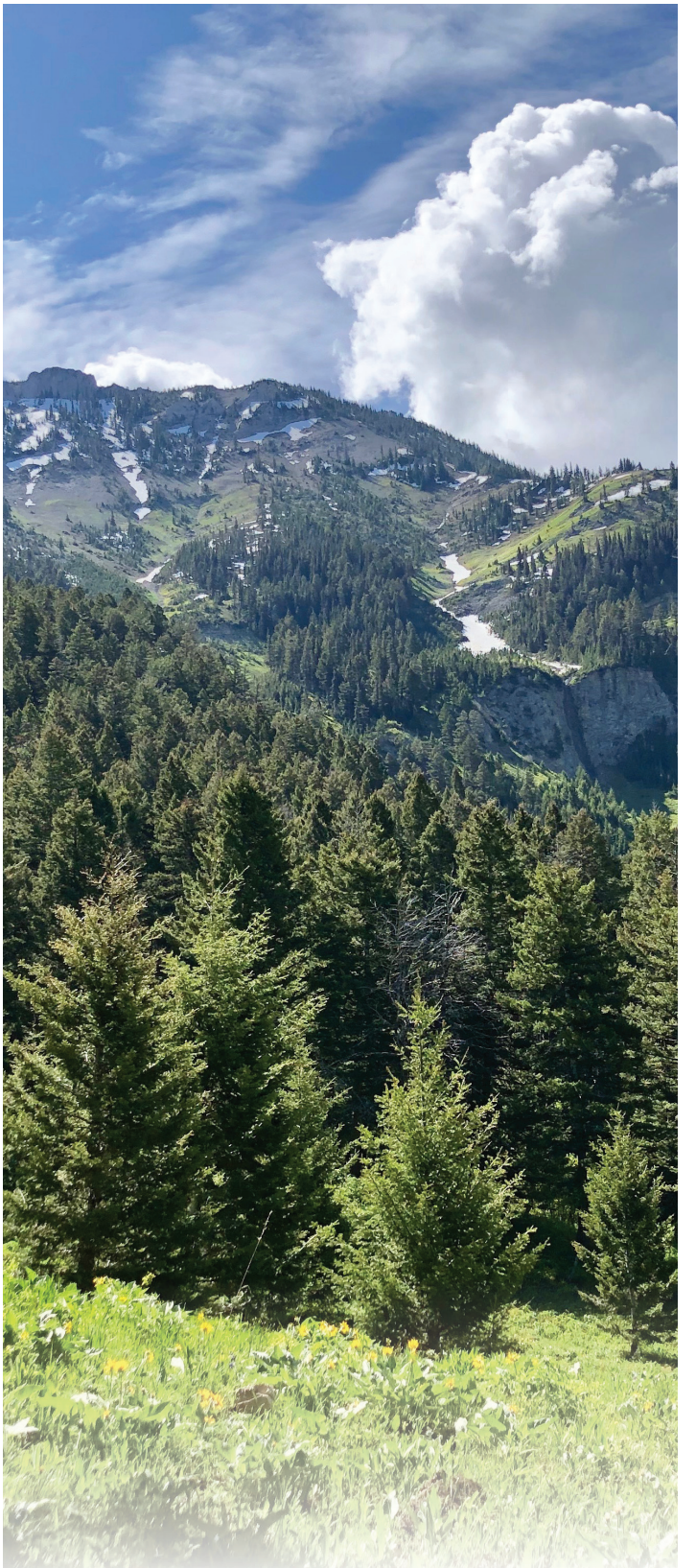
Survey participants ranked fifteen areas of need for their community. The top three are included and profiled.

Stakeholder Data

Quotes and summaries selected from our conversations with community stakeholders in the relevant geographic area.

Community Forum Data

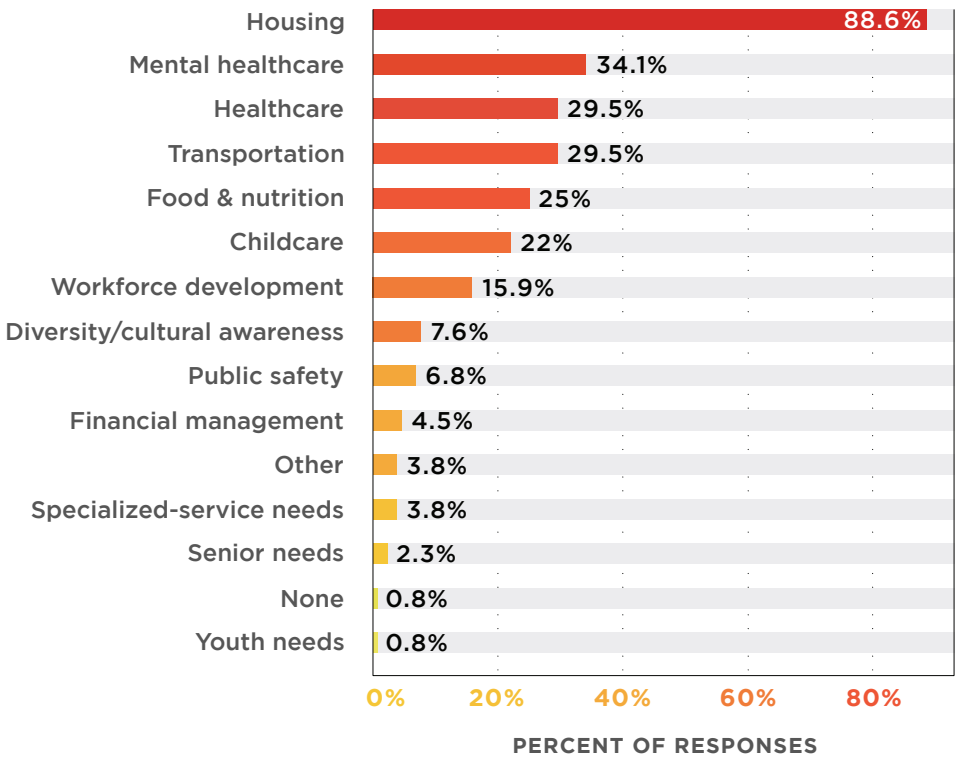
Insights and anecdotal information received by attendees of their respective community forum.



A. BIG SKY COMMUNITY PROFILE

ZIP CODES: 59716, 59720, 59730

Area Needs



Survey respondents in Big Sky ranked the following top five areas in relative importance: *

1. Housing (54%)
2. Healthcare (44%)
3. Food and Nutrition (31%)
4. Mental Healthcare (21%)
5. Transportation (16%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

One hundred and thirty two survey responses were received in the two zip codes encompassing the unincorporated community of Big Sky (59716, 59730, and 59720). More than half of the survey respondents were female (56%) and most were between the ages of 22 and 39 (73%). More than 80% of respondents were Caucasian/White (80%).The net monthly income of respondents varied widely across all income levels.

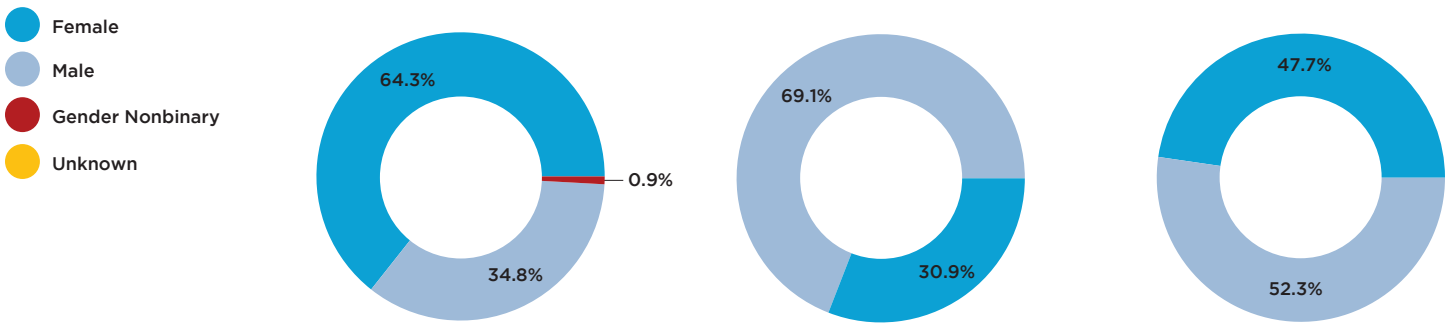
Customer Demographics

Inconsistent with our survey, HRDC serves overwhelmingly male customers (69%) in Big Sky. However, consistent with our survey, the majority of customers fall between the ages of 22 and 39. Also consistent with our survey, HRDC customers net monthly income varies across all income levels.

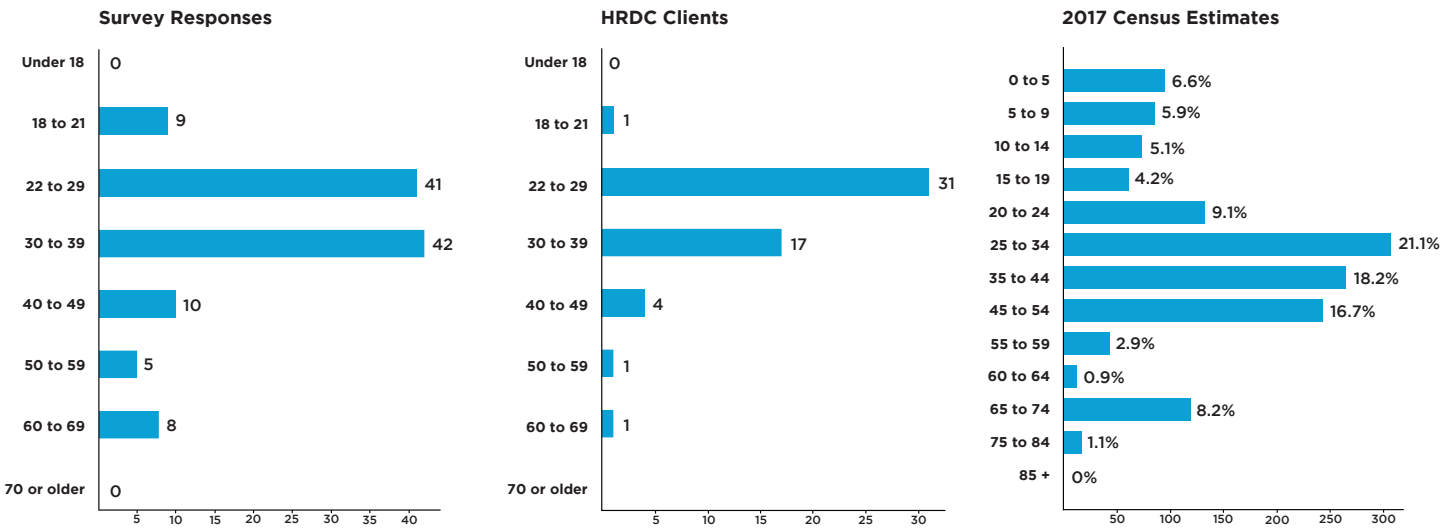
Census Demographics

According to census estimates, the total population in Big Sky is 2,904. From 2016 to 2017, Big Sky had a 5% population increase. Consistent with those that responded to the Needs Assessment Survey, the median age in Big Sky is 34.

GENDER



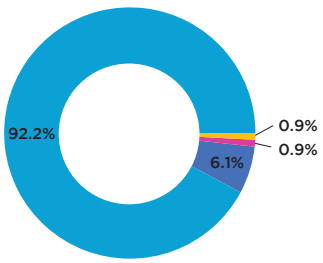
AGE RANGE



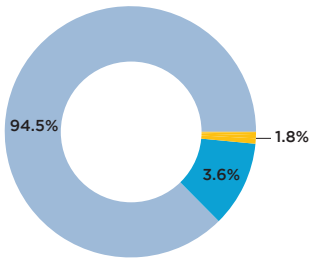
ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified

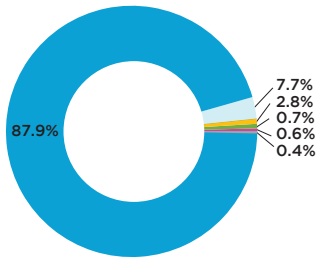
Survey Responses



HRDC Clients

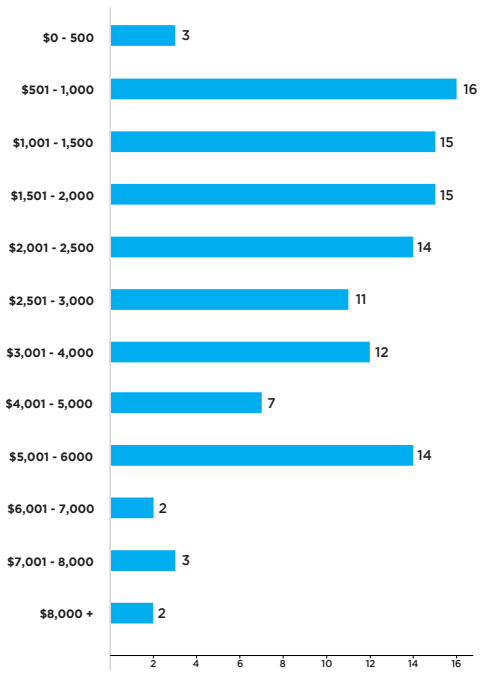


2017 Census Estimates

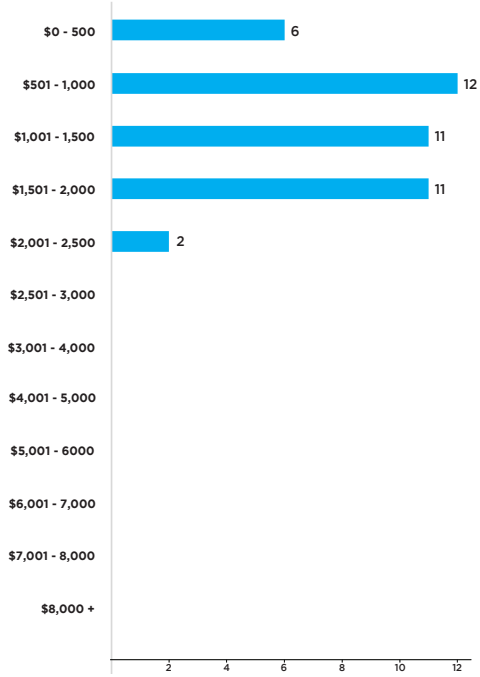


INCOME RANGE

Survey Responses



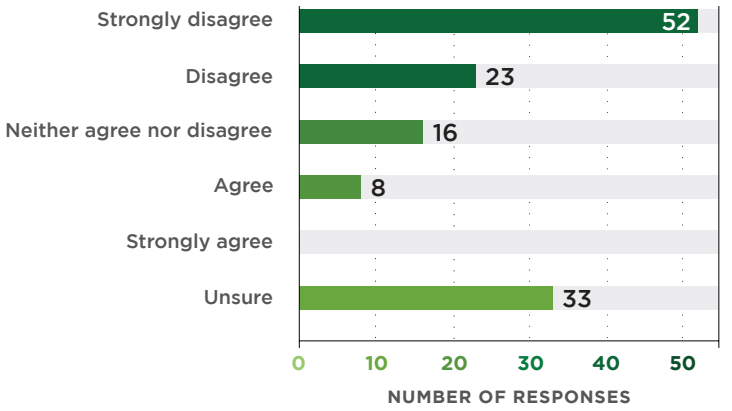
HRDC Clients



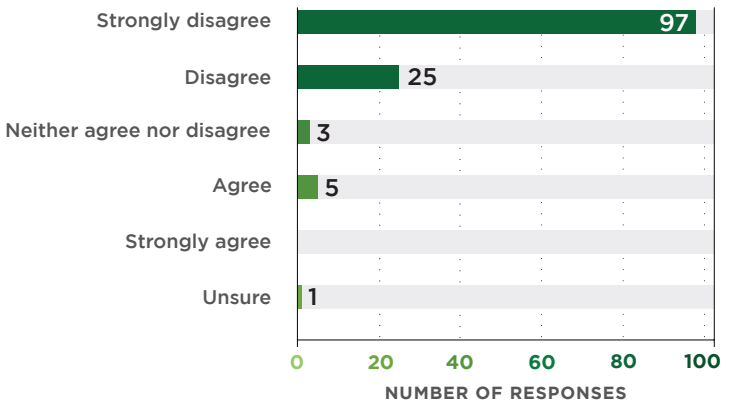


HOUSING

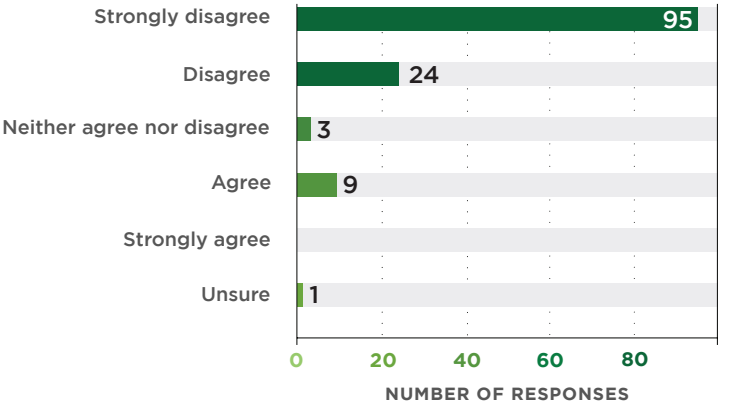
My community has resources available for those experiencing homelessness.



My community has many affordable places to rent.



My community has a wide range of affordable housing options available.



Community Conditions

The unincorporated community of Big Sky is a major tourist destination due to its vast number of recreational opportunities, including its proximity to the Big Sky Resort. While the close proximity to outdoor recreation creates jobs and a stable economy, it has also led to challenges with affordable housing. Currently, Big Sky has a very limited housing stock, including extremely low vacancy rates. Thus, individuals who work in Big Sky often reside in hotels located in Gallatin Canyon, Four Corners, or Bozeman.

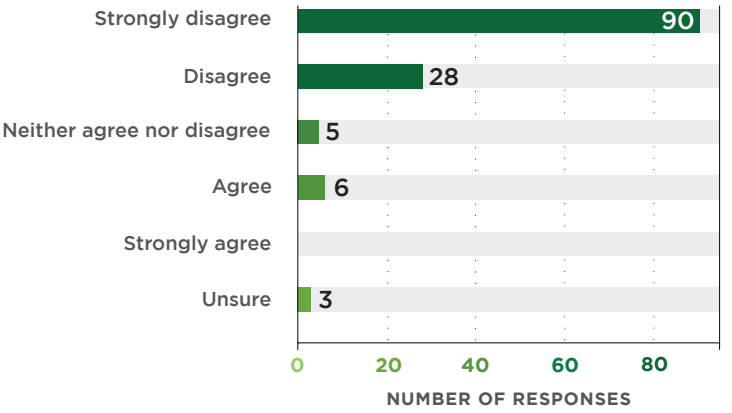
Since Big Sky is an unincorporated community, it is not governed through a town council or Mayor. Instead, it uses special purpose districts to oversee parks, schools, and other community infrastructure. In 2018, the Big Sky Community Housing Assessment and Needs report was finished, which is Part 1 of Big Sky's Housing Action Plan. This Housing Action Plan will help guide the community's efforts to create more affordable housing opportunities. The resort tax board has also invested in housing for the community.

HRDC's 2019 Community Needs Assessment Survey demonstrated similar needs as those identified in the Big Sky Community Housing Assessment and Needs Report, specifically with regards to housing. There were numerous households displaced from their rentals over the past five years, topping out near 500. In addition to housing, healthcare and food and nutrition were also identified as the most pressing needs in the Big Sky community. HRDC created the Big Sky Community Housing Trust and has been working on the meadowview housing development as well as other community initiatives.

Housing

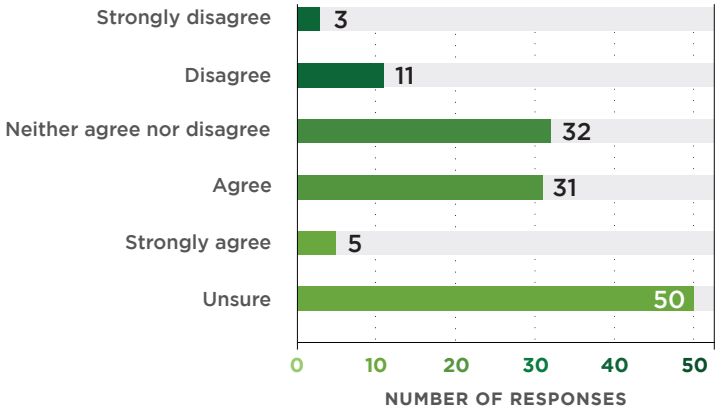
Housing was identified as the number one most pressing need in Big Sky, including both the need for more rental units and the need for more homeownership opportunities. 54% of respondents indicated that this was their top perceived need in the community. For example, 123 (93%) respondents felt that there was a lack of affordable places to rent in their community. Respondents also believed there is a lack of home ownership opportunities in Big Sky, with 118 (89%) of

My community has many affordable home ownership opportunities.



EARLY CHILDHOOD EDUCATION

My community provides quality early childhood education.



respondents believing that their community does not have affordable homes to purchase.

HRDC's survey findings are strongly correlated with the results of the Big Sky Community Housing Assessment and Needs Report. The findings of the Big Sky Community Housing Assessment and Needs Report demonstrate that 41 percent of households in Big Sky are renters. These rentals are a mix of homes, duplexes, townhomes, and condos. Big Sky has one apartment complex of 36-units. HRDC's assessment demonstrates that this number of rental units is not sufficient for the current rental needs of the Big Sky community.

In addition to the overall shortage of rental units, market rents have significantly increased in recent years as shown in the Big Sky Community Housing Assessment and Needs Report. "Rents for many units now exceed what the mortgage payment would be if renters could afford to purchase the home". Thus, even if an individual or family is able to find a place to rent, the rent is often difficult to afford. The market rental and ownership prices have soared in recent years with a nearly 33% increase amongst family homes from 2018 to 2019. The Big Sky Community Housing Assessment and Needs study showed that up to 655 housing units are needed to address the current housing shortfall for residents and workforce and the workforce and to keep up with job growth. Roughly 360 of these units need to be priced below-market to meet the full range of community housing needs. This would include a mix of one-, two, and three-bedroom housing units with prices ranging between $200,000 and $475,000 for ownership and $650 to $1,500 per month for renters.

Mental Healthcare

21% of survey respondents indicated that they perceive mental healthcare to be a priority need in the community. 44% of survey respondents indicated that they felt the community of Big Sky lacked resources for the mental needs of adults and 37% indicated they feel that Big Sky lacks resources for the mental health needs of youth.

Healthcare

Healthcare was identified as a top perceived need in the Big Sky community, with 44% of survey respondents identifying it as one of their top three needs. 72 survey respondents (55%) felt that their community did not have readily accessible, high-quality healthcare. When asked what specific healthcare-related need they had difficulty with this past year, 49 respondents said "paying for medical care" (37%), "Paying for insurance premiums" was the second most selected answer. With regards to healthcare access, counseling services was identified as the most frequently answered health-related service that Big Sky residents had difficulty accessing in the past year, while general physician care was the second

most frequently selected service. Bozeman Health's 2017 Community Health Needs Assessment Report for Gallatin, Madison, and Park Counties supports the findings of HRDC's survey. The report identifies access to health services as one of their six priority areas to guide their work, based on their study's findings.2 HRDC's Community Needs Assessment expands on the data collected by Bozeman Health and illustrates the specific services that are most difficult for Big Sky residents to access.

Food and Nutrition

Along with housing and healthcare, food and nutrition was also identified as a top need in the Big Sky community, with 41 survey respondents claiming that food and nutrition has caused themselves and/or their families difficulty in the past year.

Access and affordability to healthy food both appear to be a need, with over 65% of respondents feeling that their community does not have affordable places to buy healthy food. With regards to food and nutrition, paying for groceries/meals was identified as the top need in this arena for Big Sky residents. Accessing grocery stores was identified as the second most selected need. Most Big Sky residents indicated that they purchase their groceries at a supermarket, with others indicating they go to the local food bank. Each year about 600 unique individuals utilize the food bank for emergency food services. A portion of respondents stated that buying groceries in Big Sky is too expensive so they travel to Bozeman for their grocery needs.

Transportation

16% of Big Sky respondents indicated that they perceive transportation to be a pressing need in their community. 24% of survey respondents indicated that they felt that Big Sky lacked adequate public transportation options.





Stakeholder Interviews

When one stakeholder was presented with HRDC's survey findings, he said,

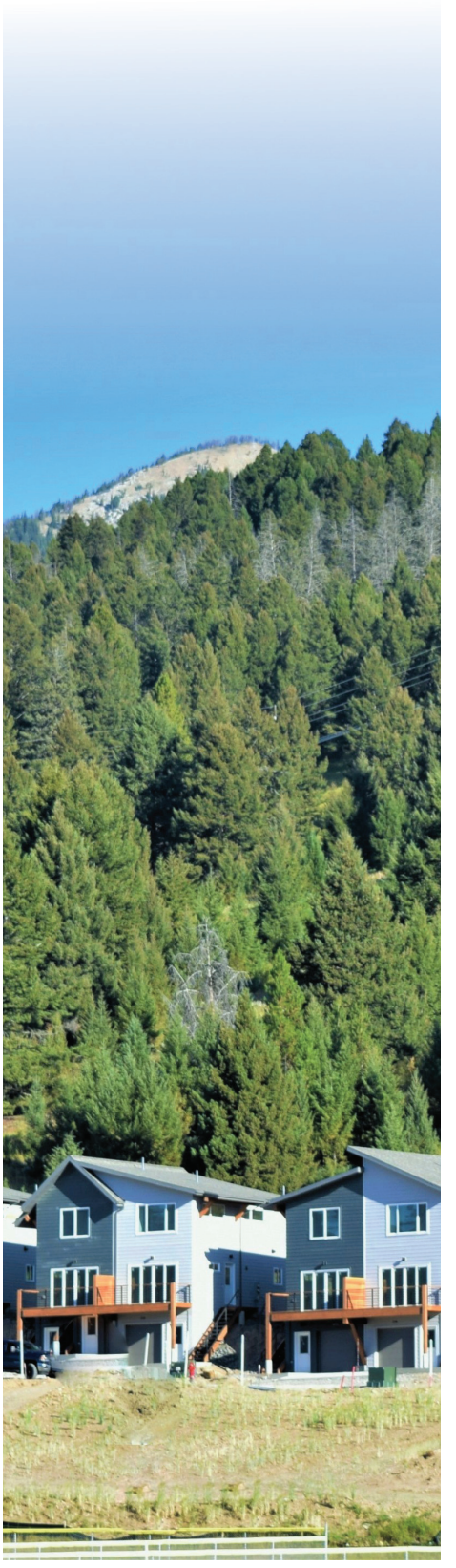
"They are in alignment with the results we received in the Big Sky vision and strategy. You know the affordable housing, when ranked amongst other needs in the community, unequivocally, popped up as the number one challenge the community is faced with."

- Quote from Stakeholder

With regards to the housing crisis, a stakeholder commented,

"It kind of appears to me as though there's two different problems that exist. There's the affordability issue which is in some ways accentuated by the short-term rental market, which is speaking to the 3% tax, the resort tax, collectors bring in. By far the largest quantity of businesses, not in terms of dollars but in terms of number of businesses, are short-term rentals. There are something like 700 plus within the community and if you take a look at how inventory is being shifted and utilized in different ways it's easy to see why property owners do what they do in terms of VRBO and Airbnb."

-Quote from Stakeholder



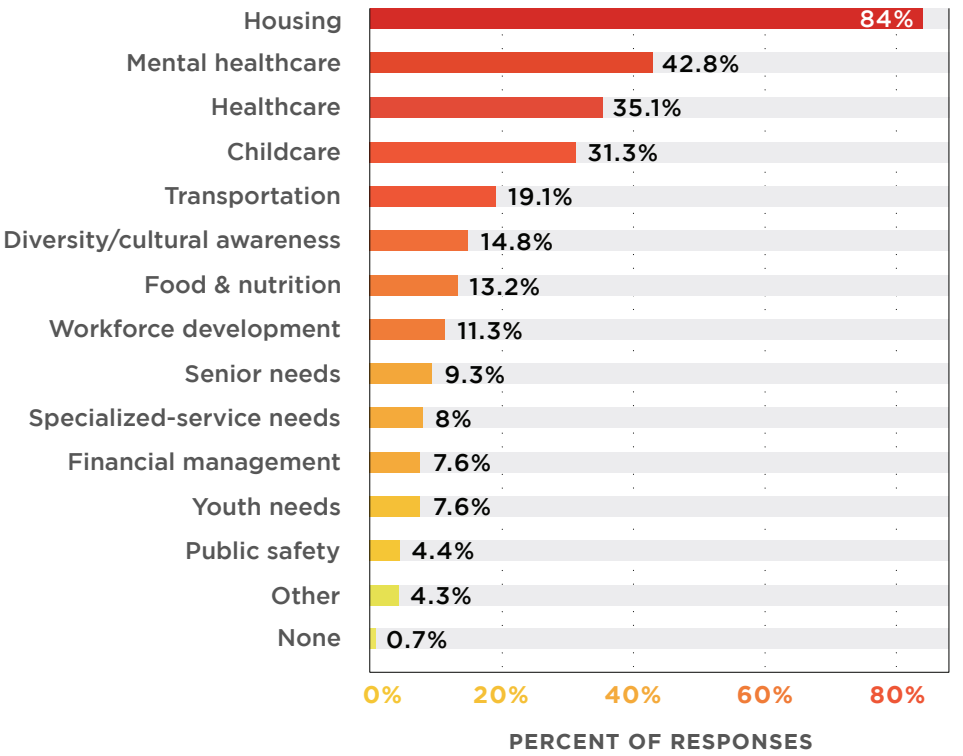
Community Forums

Instead of hosting an HRDC specific community forum, we utilized shared information from a summary of community discussions conducted by the Big Sky Vision Board and the affordable housing study.

B. BOZEMAN COMMUNITY PROFILE

ZIP CODE: 59715, 59717, 59718, 59771, 59772

Bozeman Area Needs



Survey respondents in Bozeman ranked the following top five areas in relative importance: *

1. Housing (84%)
2. Mental Healthcare (43%)
3. Healthcare (35%)
4. Child Care (31%)
5. Transportation (19%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

A total of 675 surveys were collected for the Bozeman area zip codes (59715, 59717, 59718, 59771, 59772). Majority of the respondents were female (66%) and most were between 30 and 39. Bozeman respondents were 81% white. The net monthly income of survey respondents was between $1500 and $2500.

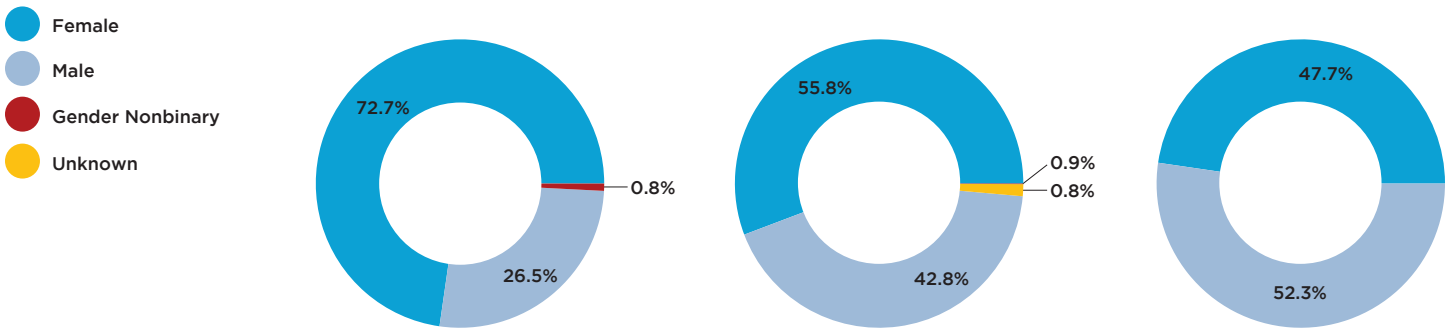
Customer Demographics

4,202 customers were served in the Bozeman community, our customers are represented as 56% female and 43% male. Consistent with our needs assessment survey, most of our customers are between 30 and 39. Inconsistent with our survey, the majority of Bozeman's HRDC customers net monthly income falls between $500 and $1500.

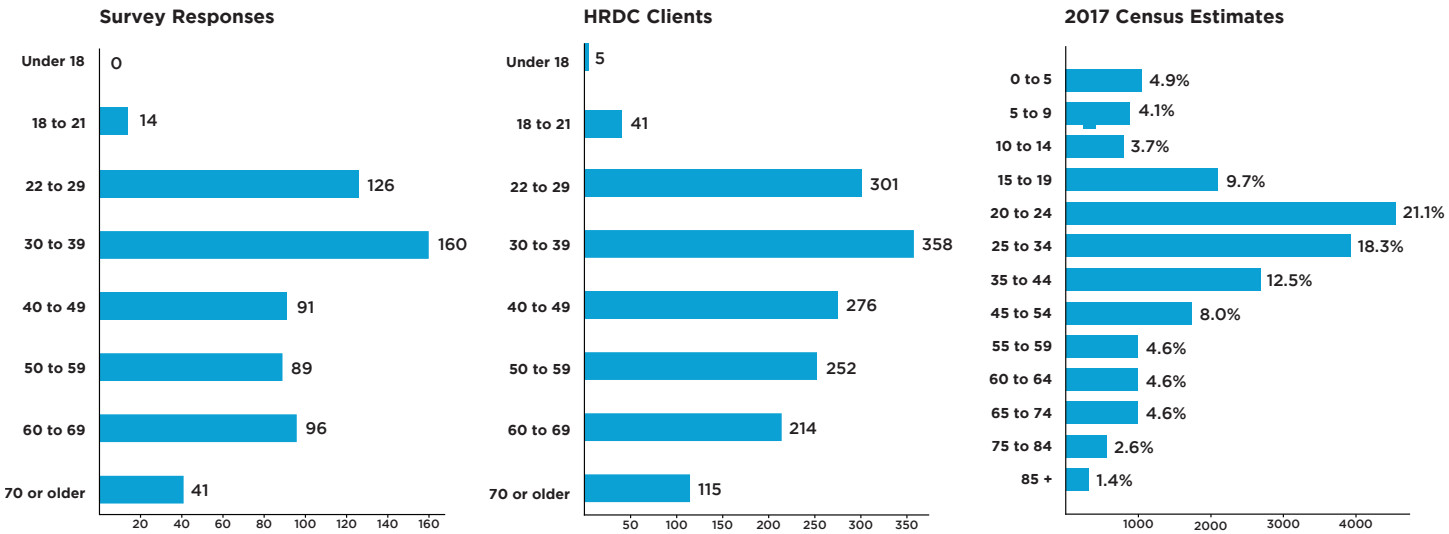
Census Demographics

US Census estimates were more consistent with our customer demographics than our survey, estimating that the population of Bozeman is roughly 47% female. Consistent with our survey, the median age in Bozeman is 28, with 46% of the population falling between 20 and 29. The median yearly household income in Bozeman is $51,896.

GENDER



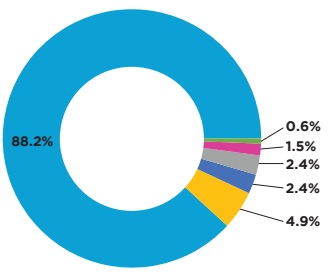
AGE RANGE



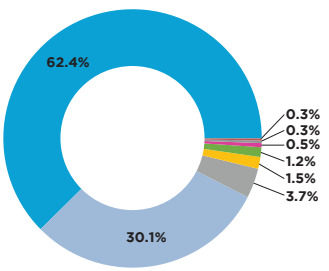
ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified

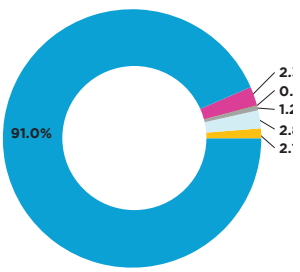
Survey Responses



HRDC Clients

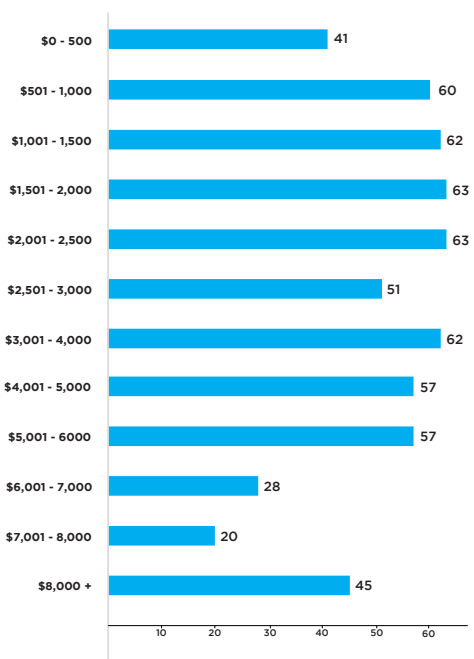


2017 Census Estimates

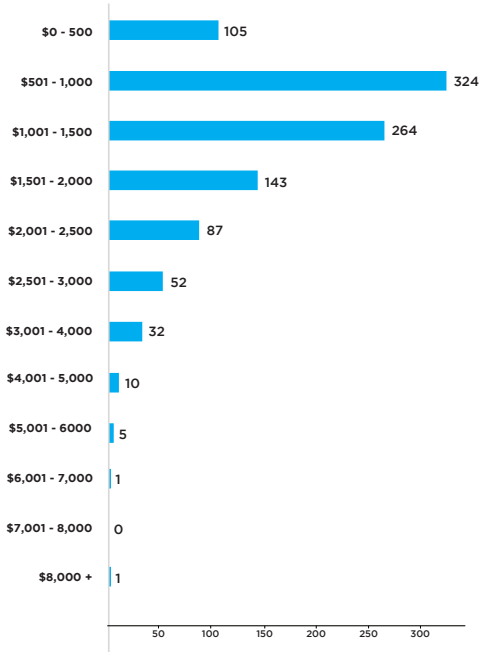


INCOME RANGE

Survey Responses



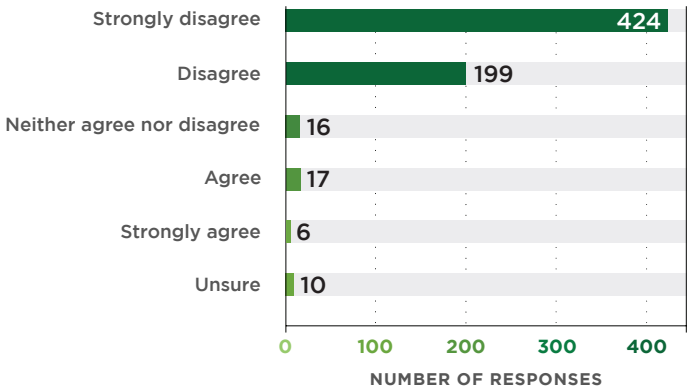
HRDC Clients



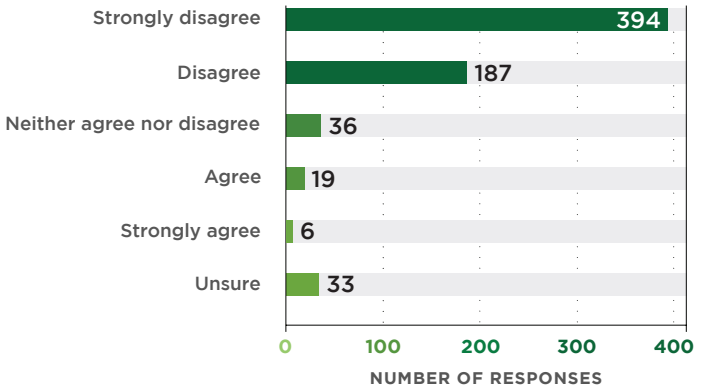


HOUSING

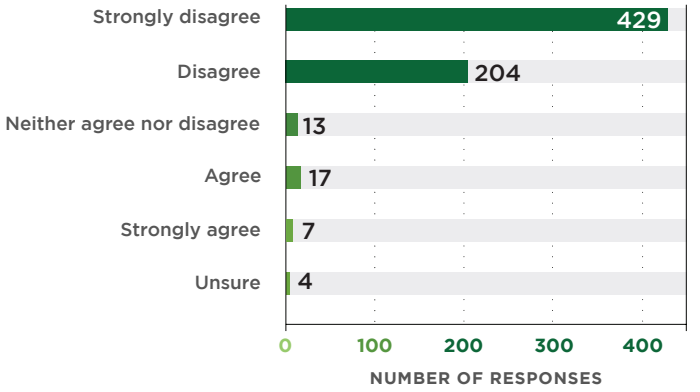
My community has a wide range of affordable housing options available.



My community has many affordable home ownership opportunities.



My community has many affordable places to rent.



Community Conditions

According to the Bozeman Labor Report, Bozeman has had greater population growth than any other micropolitan area in the United States since the last census. There were approximately 18,000 more people in Gallatin County in 2017 than there were in 2010, equating to a 20% growth rate. In Bozeman proper, the community grew by 25%, adding 9,300 more people. Even though Bozeman is growing very quickly, the unemployment rate has been below 3% since 2015. Wage growth is strong, but job growth is slowing, suggesting that local employers are having a hard time filling job openings. The increase in population has also increased the home prices in Bozeman, making it hard for businesses to retain workers.

Housing

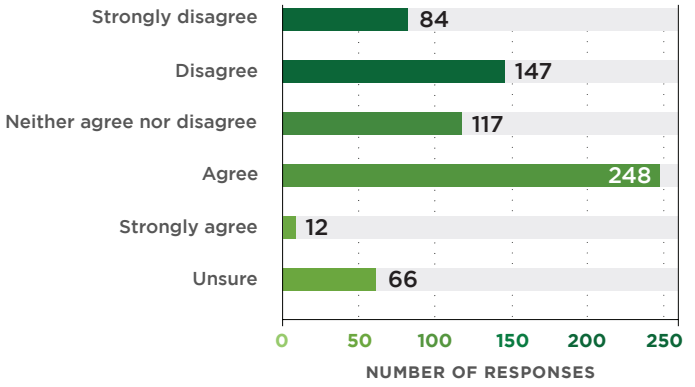
84% of survey respondents from a Bozeman zip code perceived that housing was the number one perceived need in the area. 94% of survey respondents felt that the Bozeman community does not have affordable places for its residents to rent. Similarly, 82% of Bozeman community members felt that the micropolitan does not offer affordable home ownership opportunities for its residents.

Housing prices are high in Gallatin County ($303,700) with home values 1.6 times the US Median home value ($193,500). The median household income in Bozeman is $59,400 which is marginally higher than the US median household income of $57,650. There is an evident gap between higher home prices and the Gallatin County labor market not having jobs that provide financial means to afford homes in the area.3

Housing development has not kept up with Bozeman's job growth, with jobs growing much faster. The city of Bozeman created 800 fewer units than needed to meet new job creation.

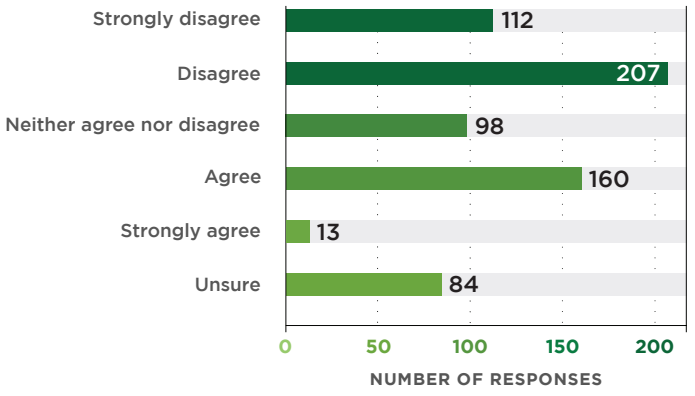
According to the Bozeman Community Housing Action Plan, 5,400-6,340 housing units are needed over the next five years to address the current housing shortfall for residents and the workforce, to keep up with job growth. Of these units, roughly 60% would need to be priced below-market to meet the range of community

My community has resources available for those experiencing homelessness.



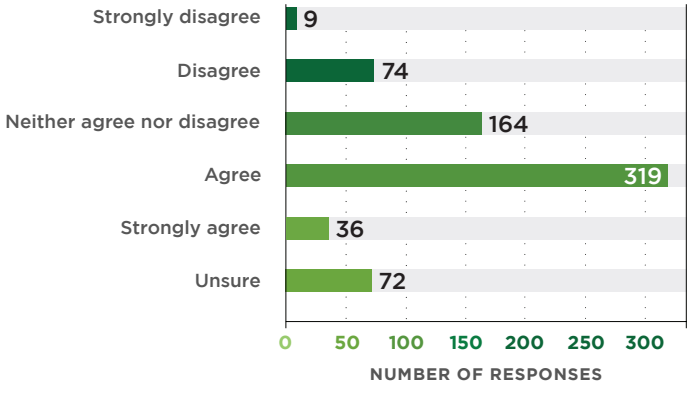
MENTAL HEALTH

My community has resources available for the mental health needs of adults.



COMMUNITY

My community is welcoming and inclusive at public meetings and community events.



housing needs. Housing costs would need to range between $160,00 and $400,000 for ownership and rentals would need to be offered at $500 to $1,200 per month.

Mental Healthcare

43% of survey respondents from a Bozeman zip code perceived that mental healthcare was a need in the area. 47% of survey respondents felt that the Bozeman community lacks adequate resources for the mental health needs of adults and youth. Uniquely, Bozeman has many resources for the mental health needs of adults and youth. The issue does not seem to be lack of resources but lack of affordable resources. Additionally, with all the options in Bozeman proper, it can be challenging for residents to navigate where to turn and what resources they may be able to afford.

Healthcare

35% of survey respondents from a Bozeman zip code perceived that healthcare was a need in the area. 38% said that healthcare was something that caused themselves and/or their family difficulty this year. 55% of survey respondents believe that Bozeman lacks accessible, high quality healthcare that is affordable. Additionally, 31% had difficulty paying for medical care while 24% had difficulty paying insurance premiums.

Similar to Bozeman's challenges with access to mental healthcare resources, it can be tough as a resident of Bozeman to know where one can seek out high quality, affordable healthcare. With some of the highest insurance premiums in the country, many residents in Montana do not have healthcare.

Child Care

Due to the city's rapid expansion, and the challenges associated with licensing child care, Bozeman is in dire need of increased quality early childhood care and education. The most recent census data demonstrates that there are roughly 2200 children between the ages

of birth to five years old, however there are only 725 licensed child care spots available in this community. Additionally census data estimates that more than 450 of these children are living in poverty, and struggle to find affordable care. In Bozeman HRDC's early childhood programs work to meet this need with free preschool to 60 qualifying families. The Bozeman School District also offers one preschool classroom to low income families.

31% of survey respondents indicated that they perceive child care to be a pressing perceived need in the community of Bozeman. 17% of survey respondents indicated that Bozeman does not offer quality early childhood education. Additionally, 45% indicated that they felt Bozeman lacked affordable child care accessible for families of all income levels.

Transportation

19% of survey respondents indicated that they perceive transportation to be a top perceived need in the community. 33% of survey respondents indicated that they felt that Bozeman did not offer sufficient public transportation options to its residents.



Stakeholder Interviews

When one stakeholder was presented with HRDC's survey findings, he said,

"As more people come to the community, demand for housing is going up and our number one issue is land and availability of land and honestly a lot of people in the community are supportive of affordable housing but not everybody is so you not only have to find land that you have to afford but communities that are open-minded to affordable housing."

- Quote from Stakeholder

With regards to the housing crisis, a stakeholder commented,

"But our community is growing so rapidly and it's growing outside of Bozeman because people can't afford to live in Bozeman."

-Quote from Stakeholder

"The whole system is difficult to understand and intimidating."

-Quote from Stakeholder

"If someone's struggling to pay rent and to pay for daycare they are going to delay preventative care"

-Quote from Stakeholder

"I think probably one of the biggest hurdles is there's just not enough access points. I think there's also a pretty deep and true stigma around mental health services. And I think that's less true right now. I think it's becoming more and more acceptable to seek services. But I think it still is hard."

-Quote from Stakeholder

Stakeholders agreed with the need for better mental healthcare in Bozeman, saying there is not enough access to professional counselors, particularly for people who do not have health insurance or a widely-accepted health insurance such as Medicaid or Medicare. They also noted that there are currently no rehabilitation centers for residents in the community. Additionally, the growing Spanish-speaking population is not being served by mental health providers; one stakeholder said they know of only two behavioral counselors in the Bozeman area who speak Spanish.

Community Forums

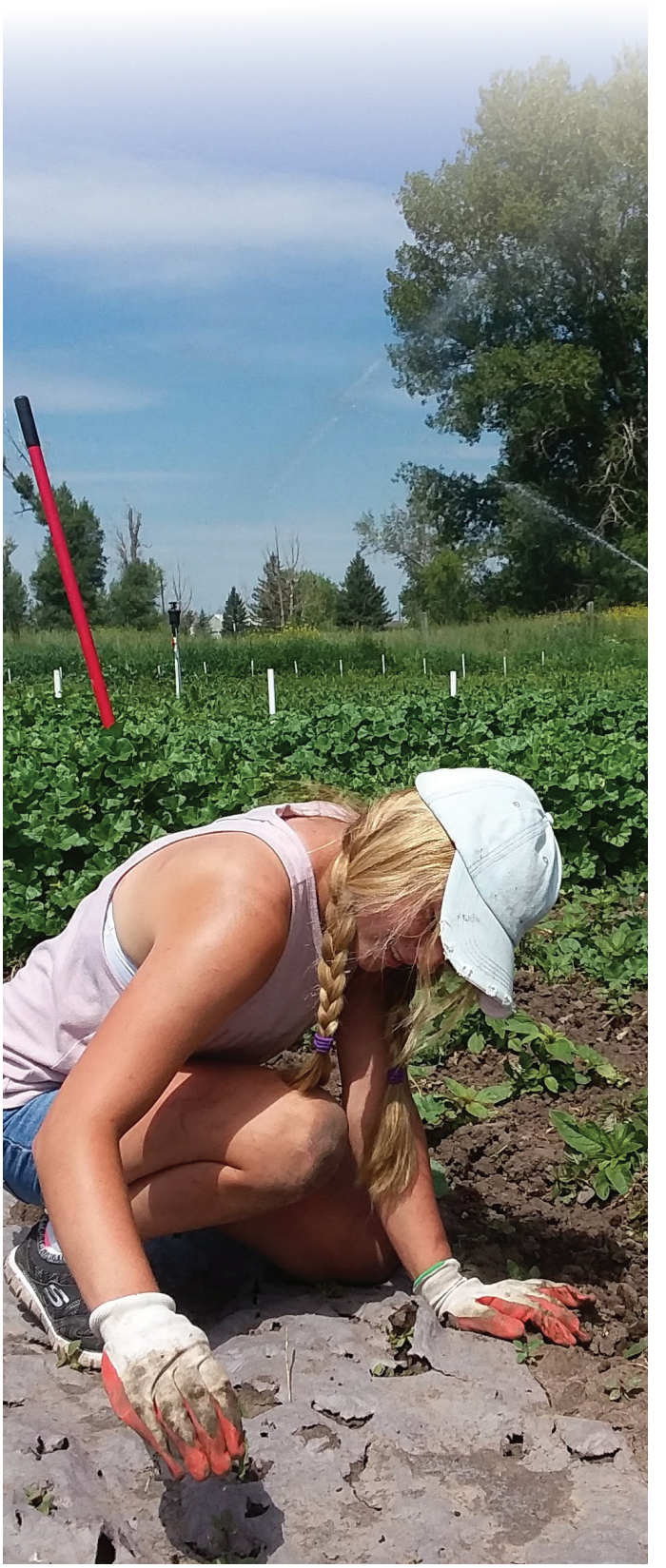
Tuesday, September 24, 2019 - Fork and Spoon

Thursday, October 1, 2019 - Fork and Spoon

Thursday, October 3, 2019 - Bozeman Public Library

Attendees of the community forum said they agreed that housing was the top need in their community. Several community members commented that local wages do not match rents. They mentioned several other factors, such as high move-in fees that include a deposit, and first and last month's rent. This was no doubt a reason behind the large increase in the homeless population, one community member noted. Community members said there was a lack of access and affordability to mental healthcare access in the Bozeman area. They noted how the housing crisis can exacerbate existing mental health problems for individuals. While CHP is a helpful community resource, they noted the stigma attached to mental healthcare that can also act as a barrier. Attendees of the forum concurred that housing was the most pressing need in their community. Local wages are not in line with rental costs, several participants noted. Community members said there was a lack of access and affordability to mental healthcare access in the Bozeman area. They noted how the housing crisis can exacerbate existing mental health problems for individuals.

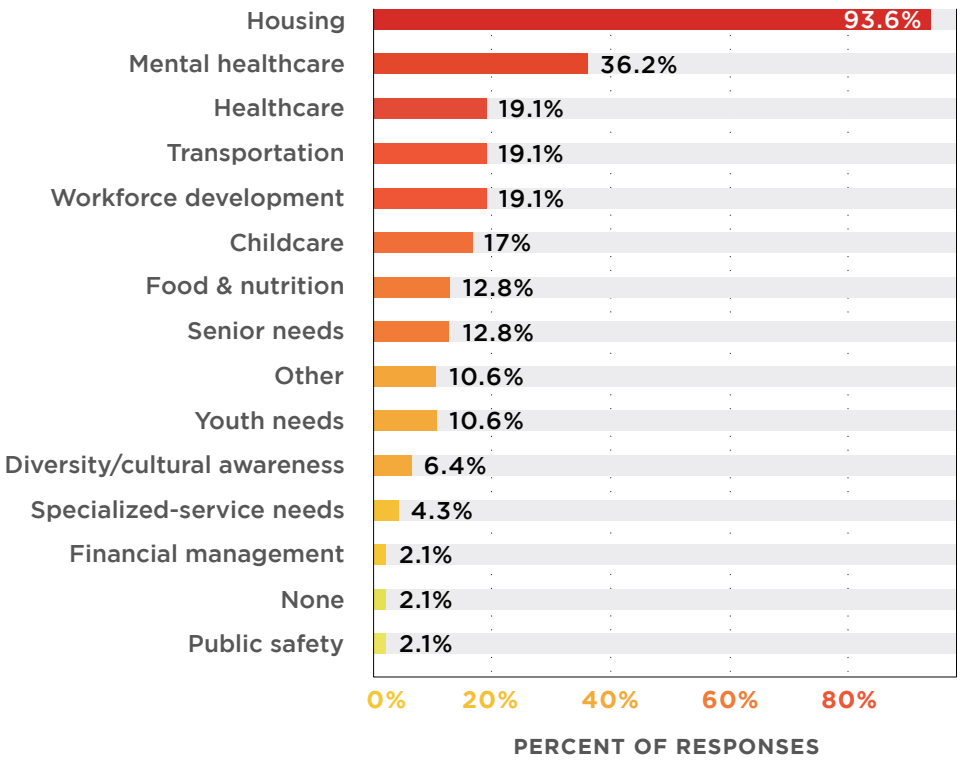
In addition to the housing crisis here in Bozeman, many individuals who attended the community forums expressed concern around senior services and a lack of transportation for the aging population. It seemed uniformly felt that there was a lack of resources for our seniors and navigating existing resources seemed to be problematic and not intuitive. As it relates to transportation, with the aging population continuing to grow, the need for transit to medical appointments also grows.



C. GARDINER COMMUNITY PROFILE

ZIP CODE: 59030

Gardiner Area Needs



Survey respondents in Gardiner ranked the following top five areas in relative importance: *

1. Housing (94%)
2. Mental Healthcare (36%)
3. Healthcare (19%)
4. Transportation (19%)
5. Workforce Development (19%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

There were 47 survey responses from the Gardiner zip code (59030). More than three quarters of the survey respondents were female (84%) and most were between the ages of 40 and 59 (64%). 90% of respondents were Caucasian/White. The monthly take home pay of respondents varied across all income levels, with about 34% making between $0 and $2,000 per month, 39% making between $2,001 and $4,000 per month, 16% making between $4,001 and $6,000 per month, and 11% making more than $6,001 per month.

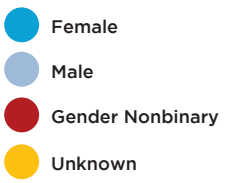
Customer Demographics

HRDC does not have many customers living in Gardiner proper, at the time of the survey, we had two documented HRDC customers. Inconsistent with our needs assessment survey, the age range of customers served in Gardiner falls between 22 and 29.

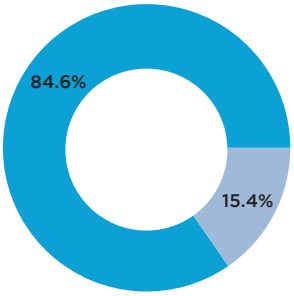
Census Demographics

Consistent with our survey, the median age in Gardiner is 43 and the majority of the population is white (89%). Unlike our survey, census estimates that 50% of Gardiner is female and 50% is male. The median household yearly income is $52,559.

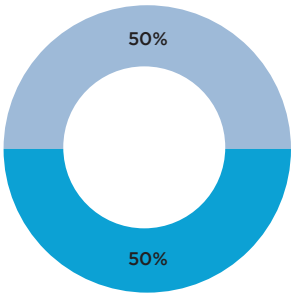
GENDER



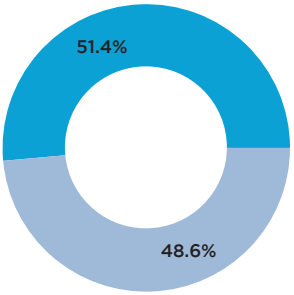
Survey Responses



HRDC Clients

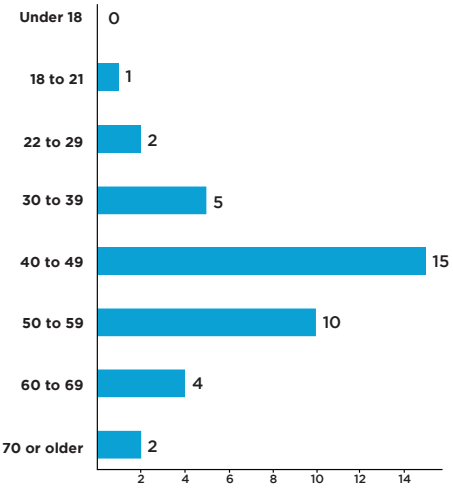


2017 Census Estimates



AGE RANGE

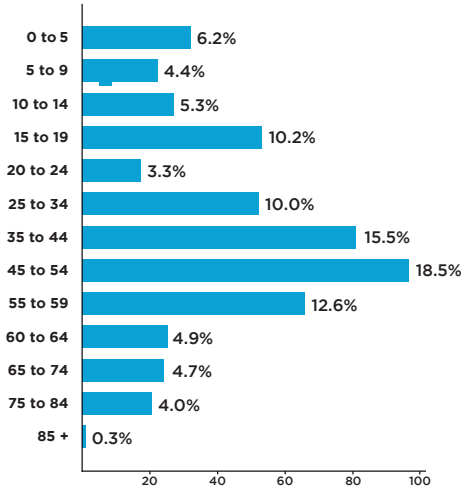
Survey Responses



HRDC Clients

2 customers between 22-29

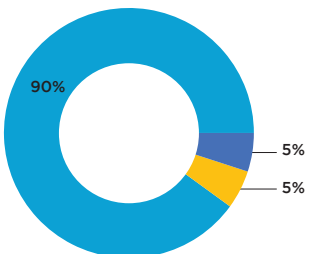
2017 Census Estimates



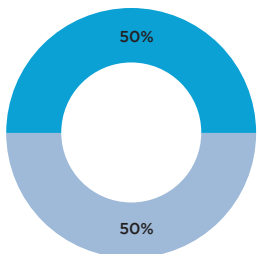
ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified

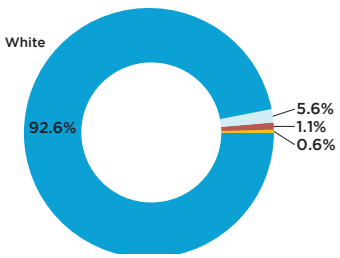
Survey Responses



HRDC Clients

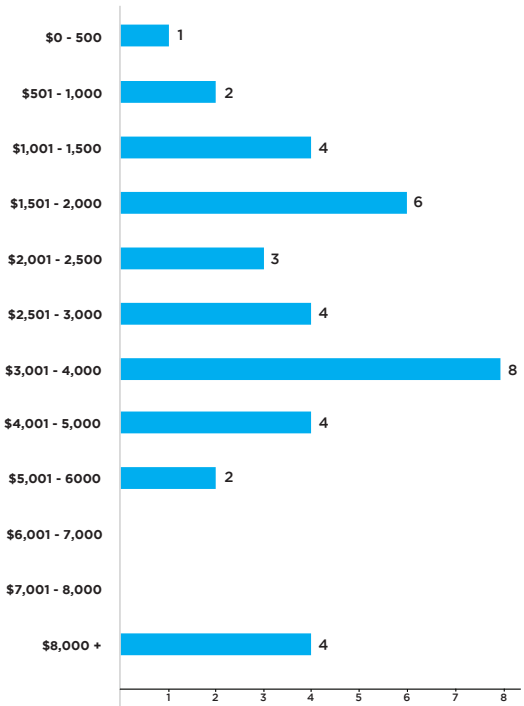


2017 Census Estimates



INCOME RANGE

Survey Responses



HRDC Clients

1 customer between $501-1,000

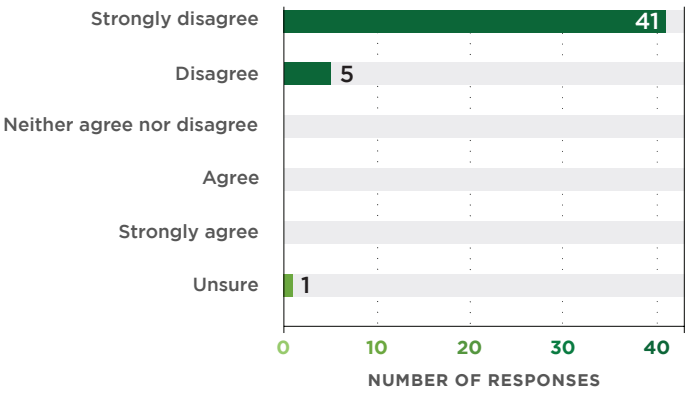
1 customer between $3,001-4,00



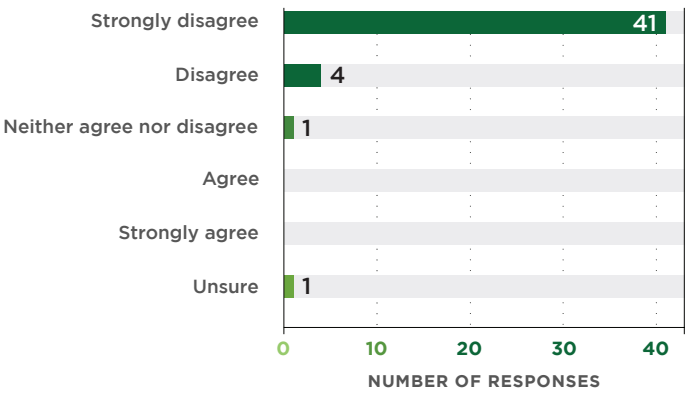


HOUSING

My community has a wide range of affordable housing options available.



My community has many affordable places to rent.



Community Conditions

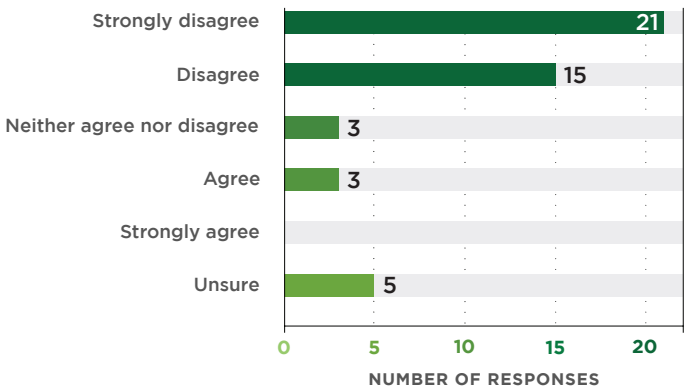
Like many seasonal, tourism-focused communities, Gardiner struggles to meet the demand for affordable housing. The town itself is a small community of about 900 residents. However, due to its proximity to the north entrance of Yellowstone National Park, the town experiences an influx of over 650,000 visitors every summer. These visitors place pressure on the service sector workforce in Gardiner, specifically for hotels, restaurants, retail, healthcare, etc. Many workforce employees are needed seasonally and annually to accommodate the town's large number of visitors; however, workforce housing is difficult to find. This housing shortage creates challenges for employee recruitment and retention.

While the need for workforce housing is abundant, the town is faced with many housing constraints. For example, Gardiner is encircled by the physical boundaries of Yellowstone National Park and Forest Service Land, which limits the land available for housing development. Furthermore, the conversion of rental units (that were previously available for seasonal or year-round rental housing) to vacation rentals has significantly reduced the housing stock available in Gardiner.

Housing

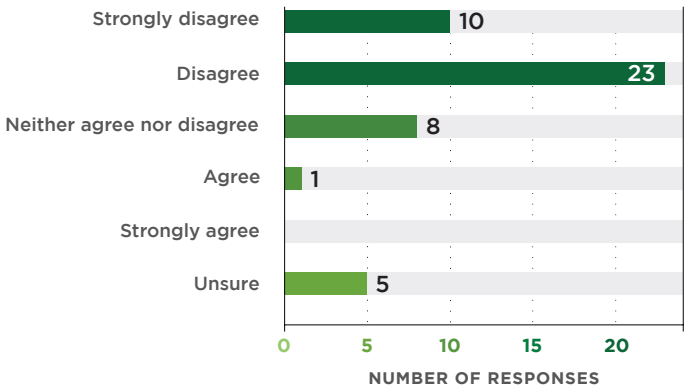
Similar to the other communities in HRDC's tri-county service area, housing was identified as the number one most pressing need in Gardiner, including both the need for more rental units and the need for more homeownership opportunities. For example, 41 (87%) respondents felt that there was a massive lack of affordable places to rent. Respondents also believe there was a lack of home ownership opportunities in Gardiner, with 39 (83%) of respondents strongly disagreeing that their community had affordable homes to purchase. According to the Gardiner Housing Action Plan, 58% of community members in the past five years were not able to find rentals. Of this, 40% was because they did not have sufficient income to meet the required rental cost and 33% was because they had pets. It appears that the housing supply in Gardiner is actually shrinking due to seasonal and short-term rentals. Over 50% of Gardiner households cannot afford the existing median rental and home sale prices in their community.

My community has resources available for those experiencing homelessness.



MENTAL HEALTH

My community has resources available for the mental health needs of adults.



Mental Healthcare

HRDC identified mental healthcare as the second most pressing need in Gardiner, with 17 survey respondents identifying it as one of their top three needs (36%). Furthermore, 30 (64%) survey respondents felt that their community lacks adequate resources available for the mental health needs of children and youth. Additionally, 33 (70%) disagreed that their community had adequate resources available for the mental health needs of adults. When asked what specific mental health need(s) they had difficulty with this past year, 20 respondents selected anxiety, and 20 respondents selected depression. With regards to mental and general healthcare access, counseling services were identified as the most frequently answered health-related service that Gardiner residents had difficulty accessing in the past year, while general physician care was the second most frequently selected service. Psychiatric care was the third most frequently selected service. Congruent with these findings, the 2018 Park County Community Health Improvement Plan selected behavior health as one of their four priority areas. Specifically, the plan indicates that Park County through its various partnerships will increase awareness regarding behavioral health issues, develop in-community crisis services, and increase access to behavioral health services. HRDC's Community Needs Assessment expands on the data collected by local partnerships in Park County and illustrates the need for mental health services, specifically counseling and psychiatric care.

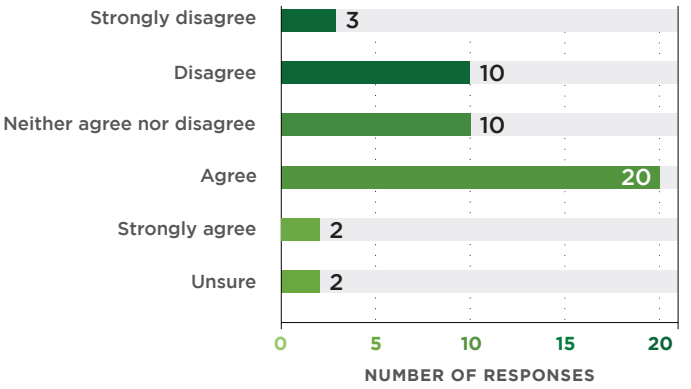
Transportation, Healthcare, and Workforce Development

Transportation, healthcare, and workforce development all tied for the third most pressing need in Gardiner, with nine respondents selecting each of them as one of the top three needs in their community (19%, 19%, 19%, respectively).

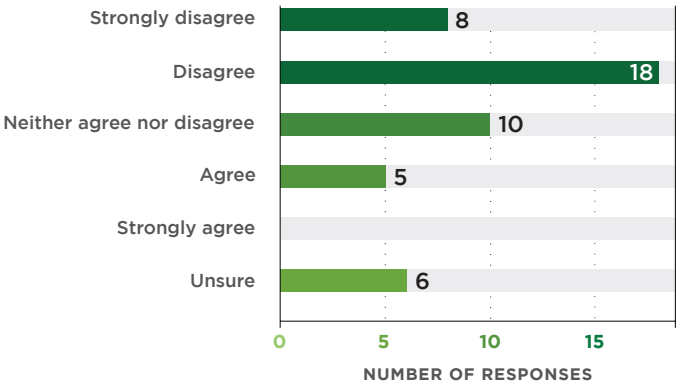
With regards to transportation, 39 (83%) Gardiner residents felt that their community lacked sufficient public transportation options available. When asked about the specific transportation need that themselves and/or their family had difficulty with in the past year, nine respondents answered "paying for car repair(s)" (21%), seven respondents answered "accessing public

COMMUNITY

My community is welcoming and inclusive a public meetings and community events.



My community has adequate resources for individuals who need access to food, clothing, technology, and/or shelter.



transportation" (17%), and six respondents answered, "paying for car insurance or registration" (14%).

Many Gardiner residents do not think their community has readily accessible, high-quality healthcare that is affordable for everyone (60%). These findings are similar to those found in the 2017 Community Health Needs Assessment Report for Gallatin, Madison, and Park Counties. Based on their study, our community partners identified access to health services as one of their six priority areas to guide their work in all three counties. Additionally, when asked what issues have given themselves and/or their families the most difficulty in the past year, 15 respondents selected healthcare (36%). It was identified as the top household need in Gardiner. According to the Park County Community Health Services Development and Community Health Needs Assessment Report, when asked what the number one health concern in park county was 64.8% of survey respondents indicated "alcohol abuse/substance abuse". Additionally, 34% indicated suicide was a high priority, as well as depression/anxiety (30.3%). Respondents were also asked what the three most important components for a healthy community were. 54% of respondents indicated that "Access to Healthcare and other Services" is important for a healthy community. Next, respondents indicated that "good jobs and a healthy economy (45.7%) would help create a healthy community. Lastly, "Healthy Behaviors and Lifestyles" (36.7%).

In addition to transportation and healthcare, Gardiner residents also identified workforce development as a top need in their community. Thirty seven respondents disagreed or strongly disagreed that their community provides resources for those searching for employment, including help with resume building, interview preparation, up-to-date job boards, and employment application assistance (79%). Gardiner residents also indicated that professional development and resume building were the specific workforce development need(s) themselves and/or their family needed in the past year.

Stakeholder Interviews

With respect to the demonstrated need for better transportation, one stakeholder said,

"...Sometimes transportation can be a real problem from a behavioral health perspective. That's where I see the power of Telehealth. You know in my private practice, three of my clients I do telehealth with. Whether they're down in Gardiner or they're more rural in montana we're there."

- Quote from Stakeholder

Another stakeholder commented about how the housing crisis in Gardiner is affecting the local school, by stating,

"Gardiner is going through such a funk too. They lost practically 30% of students at their school because there's no place to live. If the Park can find people, it is people who don't have kids. The school is struggling. We work with the school and they are in such a bind. They don't have any money or any students."

-Quote from Stakeholder

While discussing rural mental healthcare access, one stakeholder discussed some potential partnerships that may benefit Gardiner. This stakeholder stated,

"We have been in consistent conversations with L'Espirit, CHP, Gardiner School District, the Health Department, and recently Yellowstone Girls and Boys Ranch, which sounds like it might be the best partnership. Big Bear is another organization that has a mental health focus. They are paying the travel cost for MSW to go see patients out at the baptist church. So they are providing her travel costs to see patients one day a week. YBGR is funding an LCSW to be in Gardiner schools. It started as one day a week. She's up to two days a week."

-Quote from Stakeholder

Community Forums

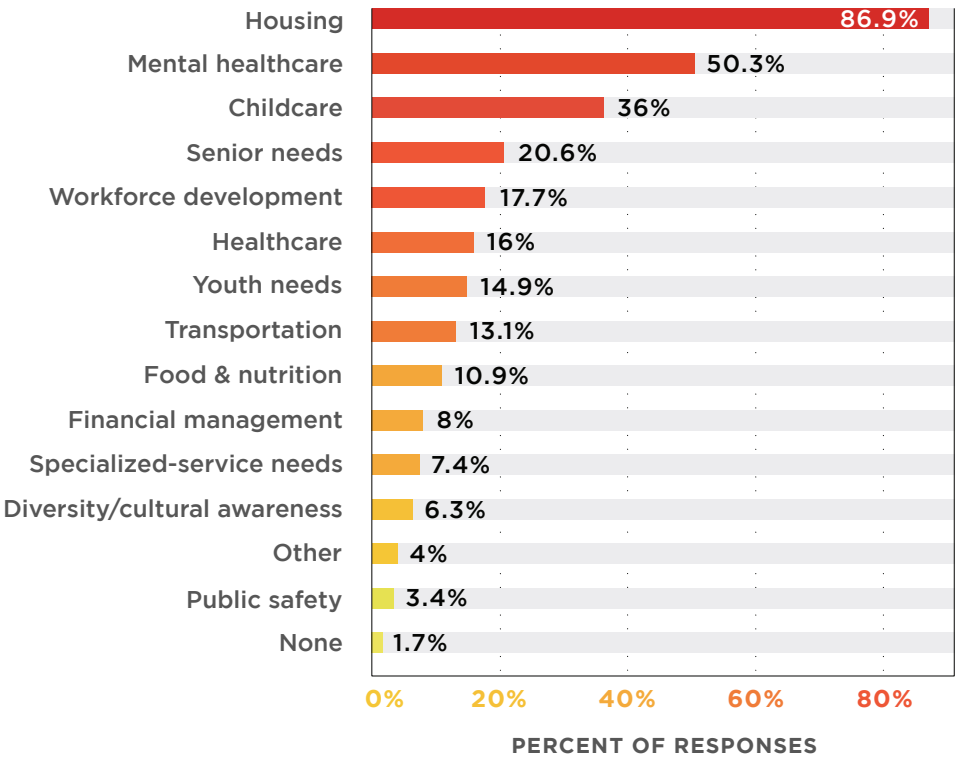
Tuesday, October 22nd, 2019 - Gardiner Community Church.

During the community forum in Gardiner, much of the conversation revolved around housing and the lack of housing stock in the community. Additionally, Gardiner lacks readily accessible healthcare resources, forcing residents to drive up to Livingston to receive care.

D. LIVINGSTON COMMUNITY PROFILE

ZIP CODE: 59047

Livingston Area Needs



Survey respondents in Livingston ranked the following top five areas in relative importance: *

1. Housing (88%)
2. Mental Healthcare (51%)
3. Child Care (36%)
4. Senior Needs (21%)
5. Workforce Development (18%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

The zip code surrounding the area around Livingston is 59047. 73% of survey respondents were women, 19% were male. 87% of survey respondents were white. Majority of survey respondents made a net monthly income of $501-$1500 and 38% were between the ages of 50 and 69.

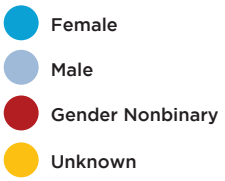
Customer Demographics

Consistent with our customer data, 84% of our Livingston customers are white. Our customers in Livingston are represented as 65% female and 35% male and the majority of the customers that we serve are over the age of 60.

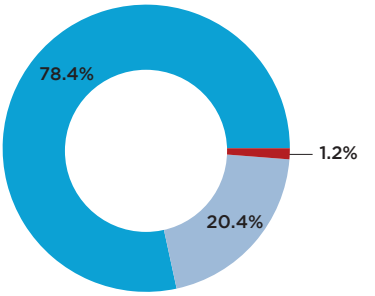
Census Demographics

According to census estimates, Livingston is 52% female and 96% white. The median household income is $42,635. The median age is 40.

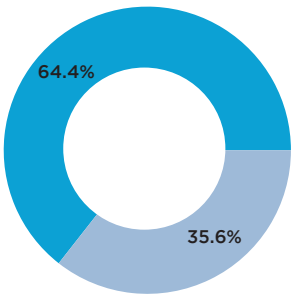
GENDER



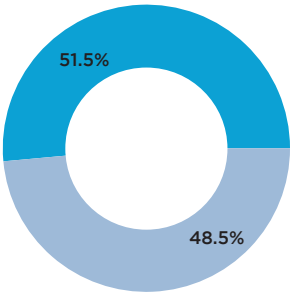
Survey Responses



HRDC Clients

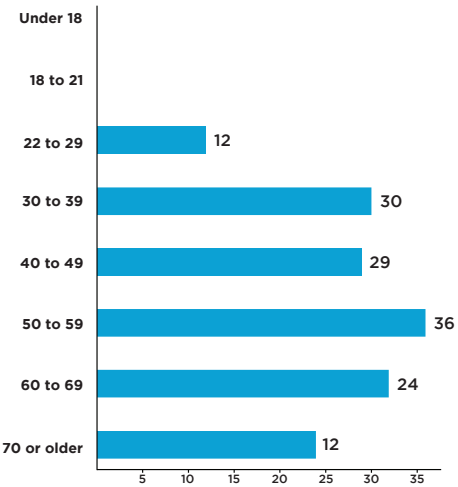


2017 Census Estimates

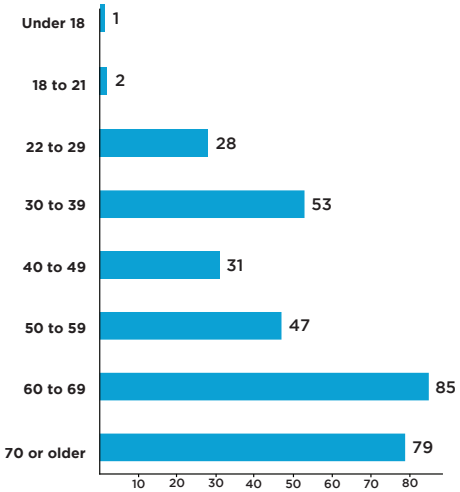


AGE RANGE

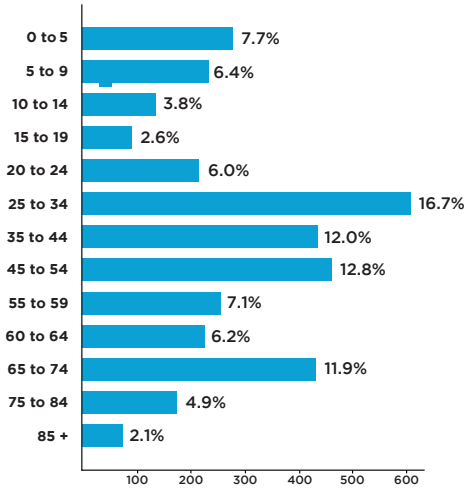
Survey Responses



HRDC Clients

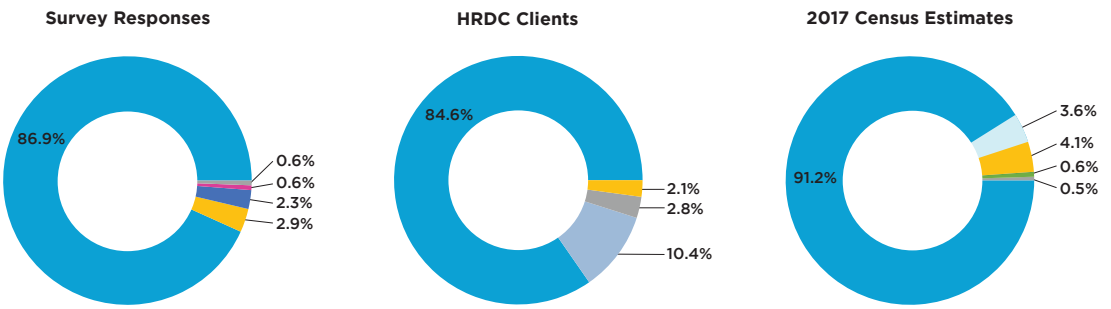


2017 Census Estimates

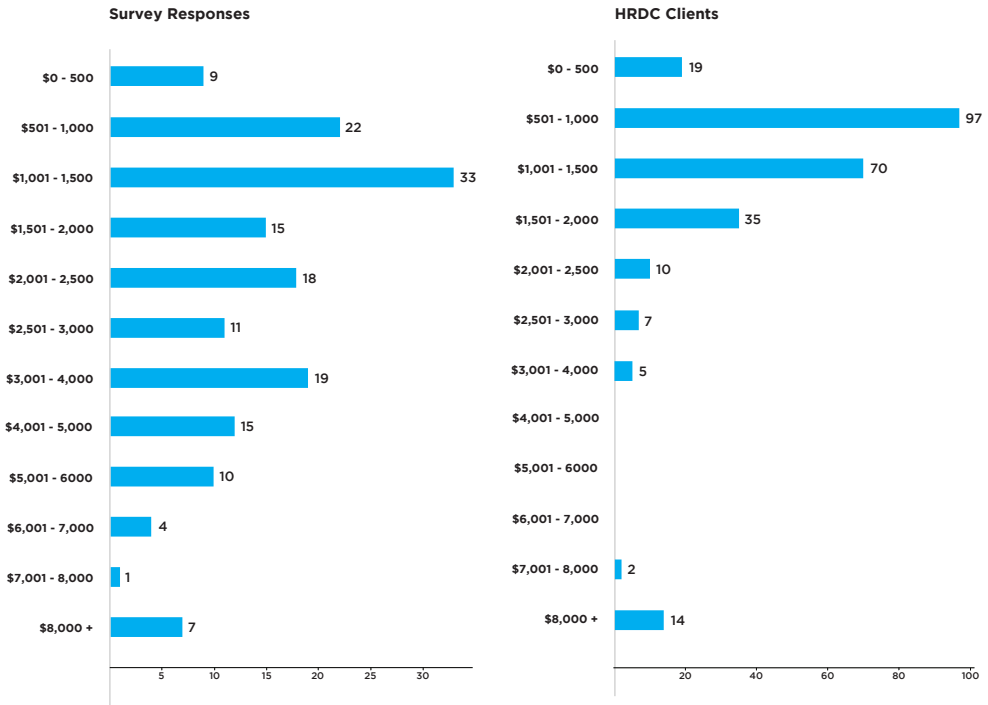


ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified



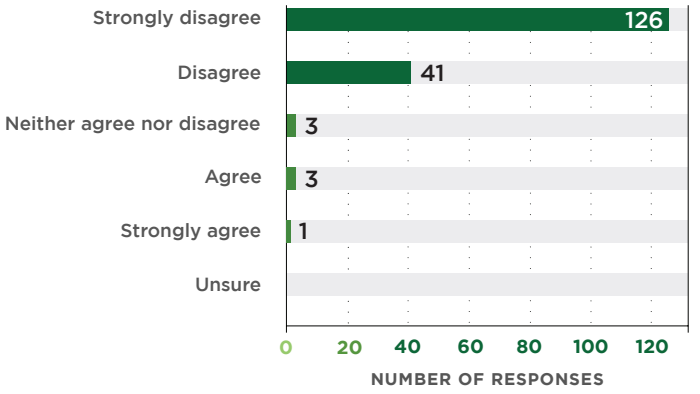
INCOME RANGE



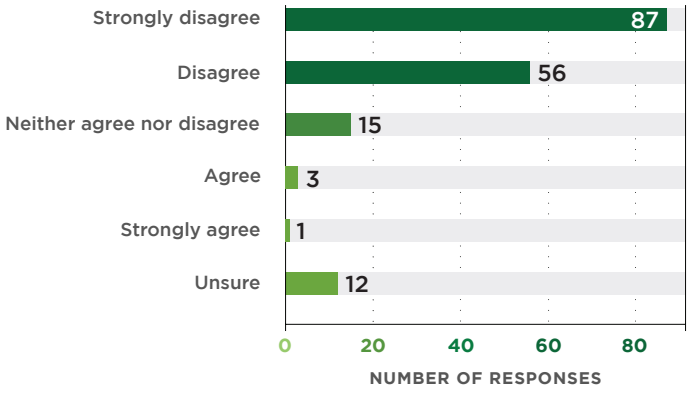


HOUSING

My community has many affordable places to rent.

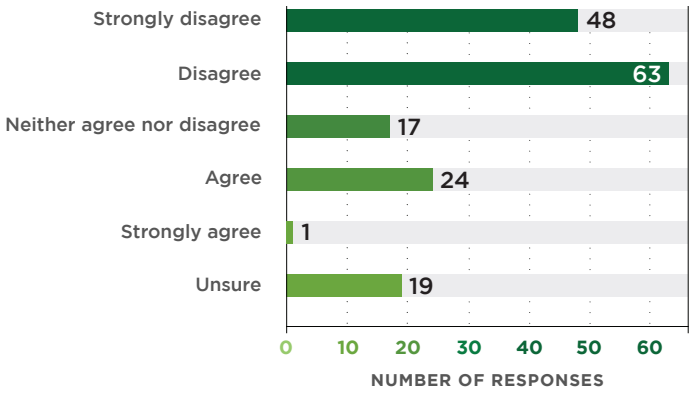


My community has many affordable home ownership opportunities.



MENTAL HEALTHCARE

My community has resources available for the mental health needs of adults.



Community Conditions

Livingston is the county seat of Park County, Montana. It is the largest incorporated community in Park County with a population of 7,529. As the gateway to Yellowstone National Park, the community of Livingston relies heavily on tourism, agriculture, and leisure activities.

Despite the recent construction of a new hospital, Livingston Healthcare, additional mental healthcare services are needed in the community as the need continues to rise. The Livingston branch of Western Montana Mental Health closed in 2018, impacting this community dramatically. Fortunately, L'Esprit opened in the community and has been an immensely useful community tool. However, suicide rates still far exceed the state and national averages. The demand for mental health services remains a pressing concern for community residents.

Housing

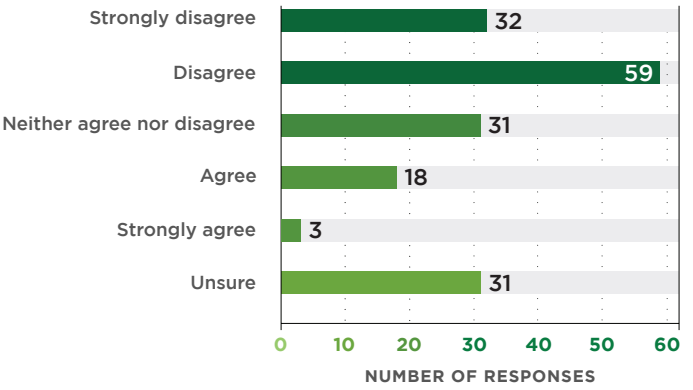
88% of Livingston survey respondents perceive housing to be the most pressing need in their community. 95% believe that Livingston does not have affordable places to rent. Similarly, 82% believe that Livingston does not have affordable home ownership opportunities. According to We Will Park County, nearly a third of Park County residents are spending over 30% of their income on housing expenses, and thus are considered "housing burdened".

Mental Healthcare

51% of Livingston survey respondents perceive mental healthcare to be a pressing need in their community. 71% believe that Livingston lacks adequate resources for the mental health needs of youth. Additionally, 61% believe that Livingston lacks adequate resources for the mental health needs of adults.

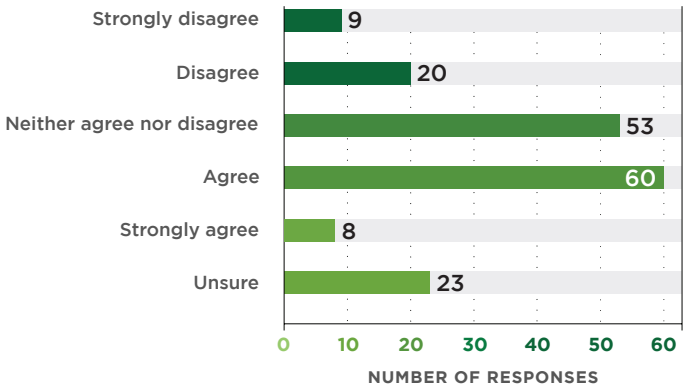
CHILD CARE

My community has childcare options for individuals and families of all income levels.

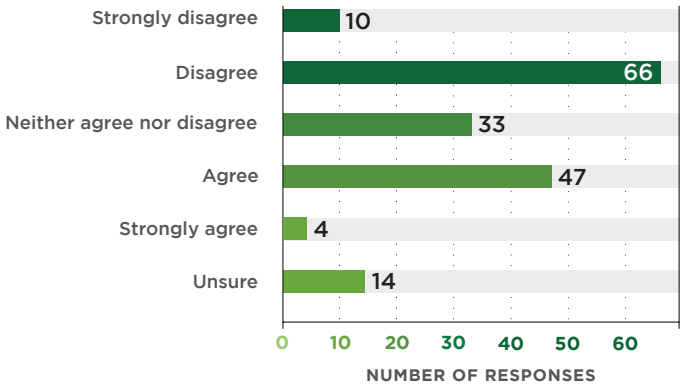


COMMUNITY

My community is welcoming and inclusive a public meetings and community events.



My community has numerous enrichment opportunities for people of all ages.



Child Care

Recent census data estimates that there are 500 children between the ages of birth through five residing in Livingston, of those roughly 70 are estimated to be living in poverty. In the past several years there have been increased closures of child care providers in Livingston, especially those that are licensed and accept child care scholarships. Available resources to address low income families' need for early childhood care and education exist in HRDC's two Early Childhood classrooms serving up to 40 children aged 3 to 5, and Washington School offering a two year preschool classroom for 4 year olds.

36% of Livingston survey respondents perceive child care to be a pressing need in their community. 36% also disagree that Livingston offers child care for individuals and families of all income levels.

Senior Needs

21% of Livingston respondents indicated that they perceive senior needs to be a need in their community. 34% believe that Livingston lacks adequate care and resources for individuals who are 65 and older.

Workforce Development

18% of Livingston survey takers indicated they perceived workforce development to be a need in their community. 44% indicated that they feel their community lacks financial management resources including help finding employment. Additionally, 63% feel that their community lacks resources for those searching for employment including resume building, interview preparation, up-to-date job boards and employment application assistance.

Stakeholder Interviews

The stakeholders we interviewed said the housing crisis comes up in every community discussion. One employer had a number of people turn down jobs because of the lack of housing rental and purchase affordability. They attributed this predominantly to a limited inventory, "and what is available is quite expensive," they said. Stakeholders identified Western Mental Health's exit from Livingston as leaving a huge gap in mental healthcare in the community. However, the addition of L'Esprit has been a community plus. They said they would like to see mental health treated equally to physical health, with regular screenings to identify need and reduce stigma.

"There are services available but I think what is there needs to be improved upon. Maybe protocol and processes need to be improved upon a little bit. So I think that there are resources available. I think that they need some fine-tuning."

- Quote from Stakeholder

"I think another piece... are we adequately screening as a community individuals who would benefit from mental health services? Are we treating mental health equally to physical health? Are we reducing stigma in community perception of mental health? I think we can improve upon awareness that mental health is just as important as physical health so that when screenings do come up it doesn't seem weird to be asked those questions."

-Quote from Stakeholder



"We've had a number of people turn down jobs because of a lack of housing affordability, whether that be rentals or purchases. Just because there's limited inventory and what is available is quite expensive. And I have concerns about as the population ages, where are they going to go?"

-Quote from Stakeholder

"We've had several employees who have trouble coming back to work after maternity leave. Some of it is just wanting to be home. Some of it is being on waitlists. Especially infants and preschool kids. And then we have after school and summer challenges. Sick child care too. See loss of productivity when employees have to stay home because they have no alternative."

-Quote from Stakeholder

Community Forums

October 24, 2019

Livingston City County Complex

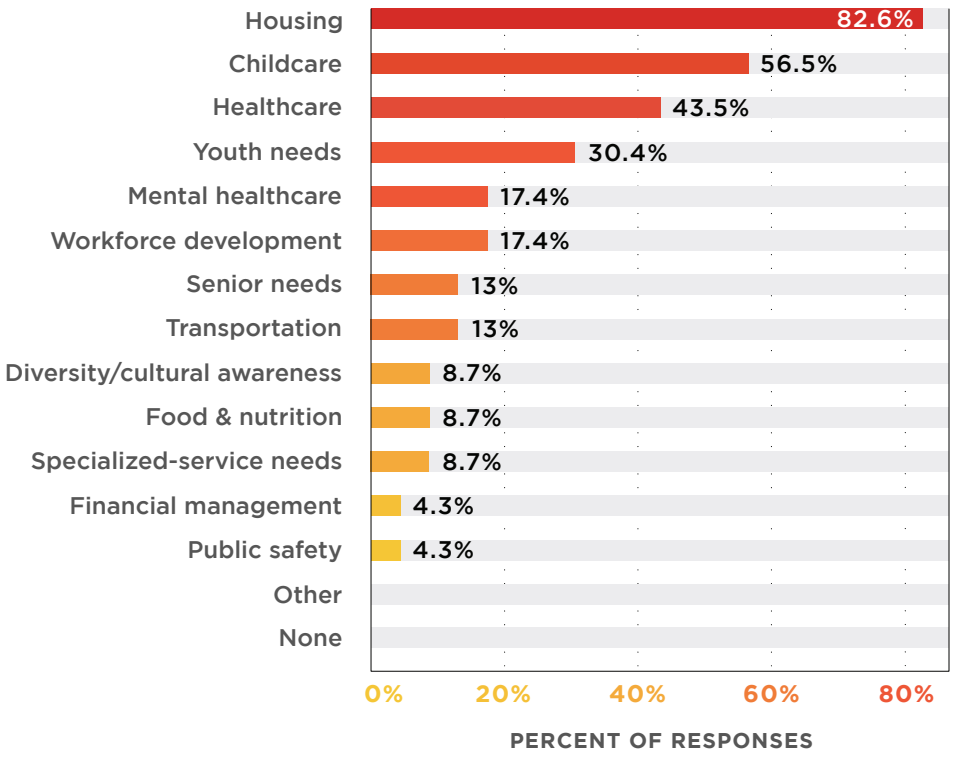
According to the community members who attended the community forum, housing is a critical need. Studios in town can cost up to $700-800 and one bedroom apartments up to $1200. This results in many people living together, living in RVs, or leaving Livingston altogether. Community members also noted the high suicide rate and absence of a mental health center. Although the hospital and L'Espirit fills some holes, Livingston lacks walk-in and case management services. child care was a struggle for parents in the area, said one participant, and suggested the high cost of housing and strict licensing requirements as possible culprits.



E. MANHATTAN COMMUNITY PROFILE

ZIP CODE: 59741

Manhattan Area Needs



Survey respondents in Manhattan ranked the following top five areas in relative importance: *

1. Housing (83%)
2. Child Care (57%)
3. Healthcare (44%)
4. Youth Needs (30%)
5. Mental Healthcare (17%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

Twenty-five survey responses were received in the Manhattan zip code (59741). 90% of all survey respondents were female and 95% were Caucasian/White. Almost half of respondents were ages 30-39 (45%) and a third were 50-59 (30%). 20% of survey respondents reported their monthly income fell between $3,001 and $4,000 and 15% between $2,0001 and $2,500.

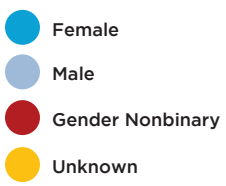
Customer Demographics

Consistent with our customer data, 64% of our Manhattan customers are white. Our customers in Manhattan are represented as 57% female and 42% male and the majority of customers that we serve are between 30 and 59.

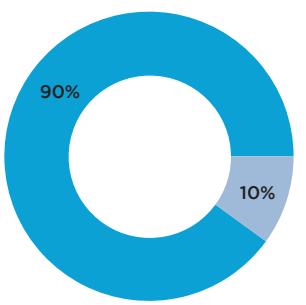
Census Demographics

US Census estimates were more congruent with customer demographics than survey responses. Estimates show a significantly larger male population than female, with a 5% difference. The largest age group is 35 to 44 years with a median age of 45.5.

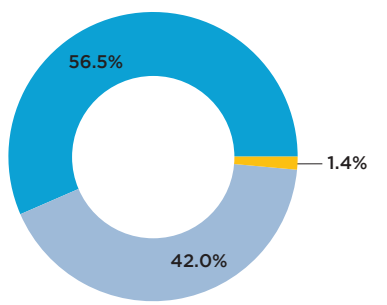
GENDER



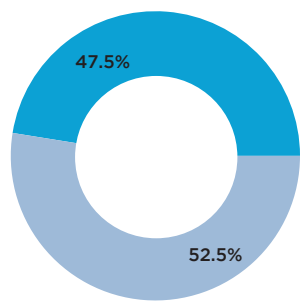
Survey Responses



HRDC Clients

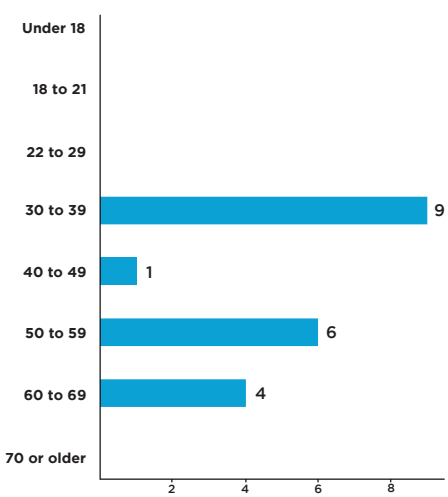


2017 Census Estimates

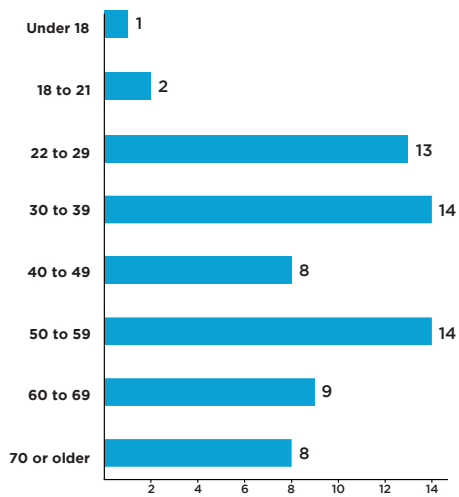


AGE RANGE

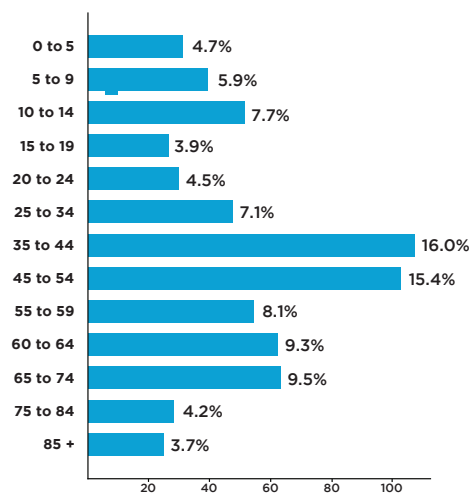
Survey Responses



HRDC Clients



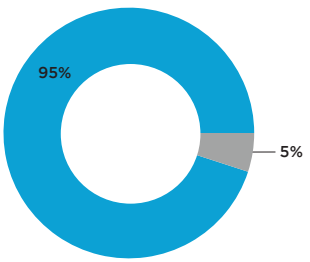
2017 Census Estimates



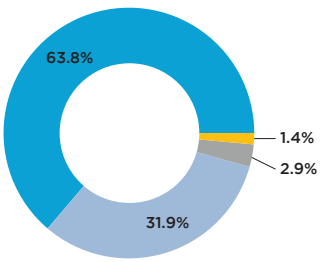
ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified

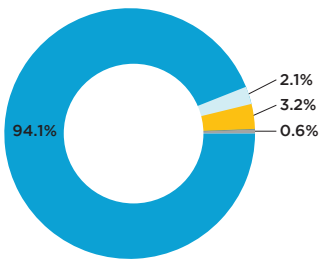
Survey Responses



HRDC Clients

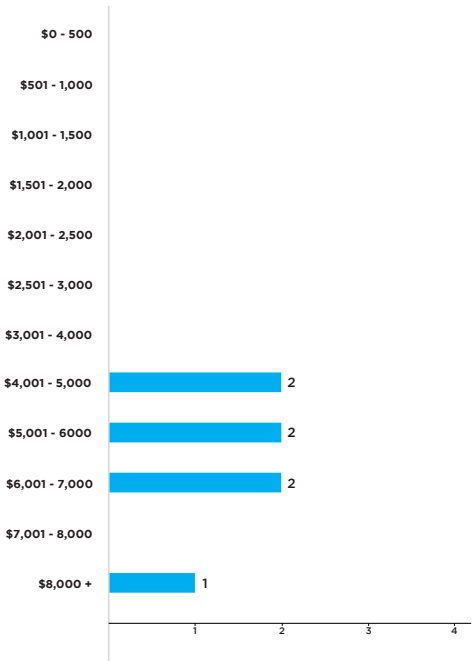


2017 Census Estimates

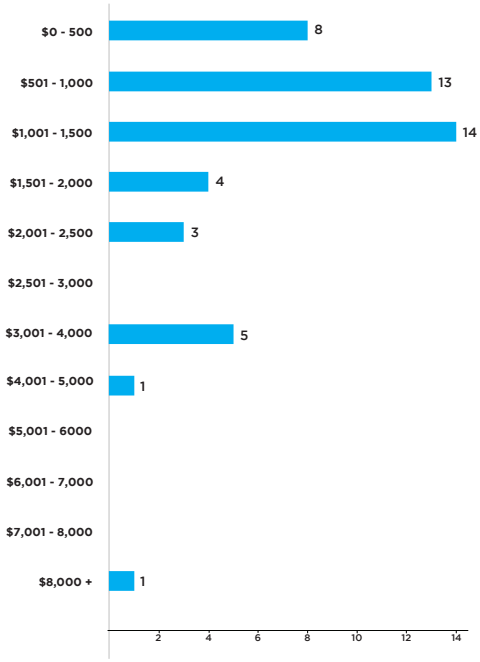


INCOME RANGE

Survey Responses



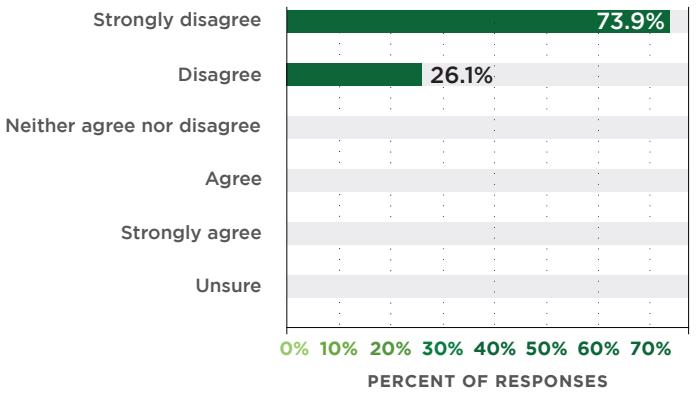
HRDC Clients



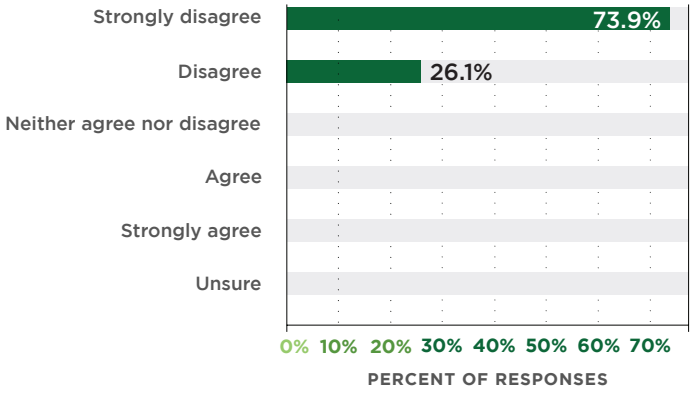


HOUSING

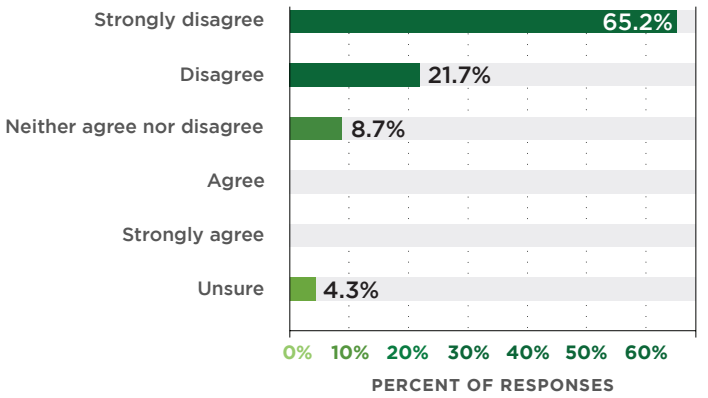
My community has a wide range of affordable housing options availabe.



My community has many affordable places to rent.



My community has many affordable home ownership opportunities.



Community Conditions

Manhattan became an incorporated community in 1911, and is located in the northwestern part of Gallatin County. In 2017, Manhattan had a modest population of 1,342, which was a 3.2% growth from 2016. Many residents live in Manhattan and commute to work in surrounding communities such as Belgrade and Bozeman, though less expensive home options for those willing to commute are becoming scarcer. Single-family home sale prices in Manhattan have increased faster than Belgrade and Bozeman, rising 102% from 2012 to 2018.

Housing

As with the overall survey results, the cost of rent and housing was perceived to be the most-encountered challenge. 100% of survey respondents said Manhattan lacked a wide range of affordable rental options. Home-ownership was seen as less critical, with 87% of respondents claiming Manhattan lacks affordable home-ownership opportunities. Manhattan has seen rapid growth in recent years. This can be attributed to the rising cost of homes in both Bozeman and Belgrade, forcing residents to look further.

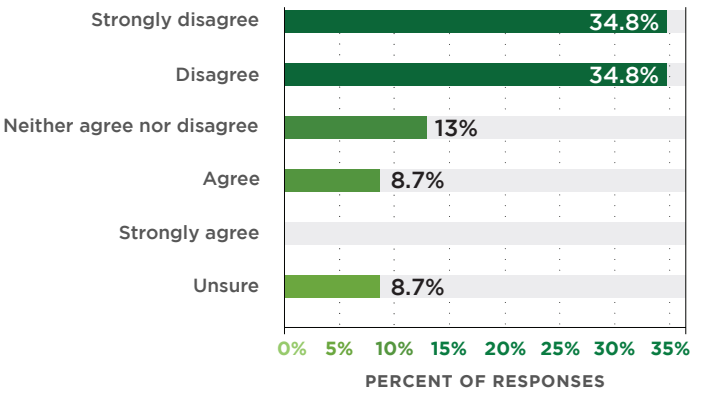
The average cost of a one or two bedroom apartment equates to nearly $1,500. With the building of the Pioneer Crossing development, Manhattan has hit water capacity which was originally anticipated for 2032.

Child Care

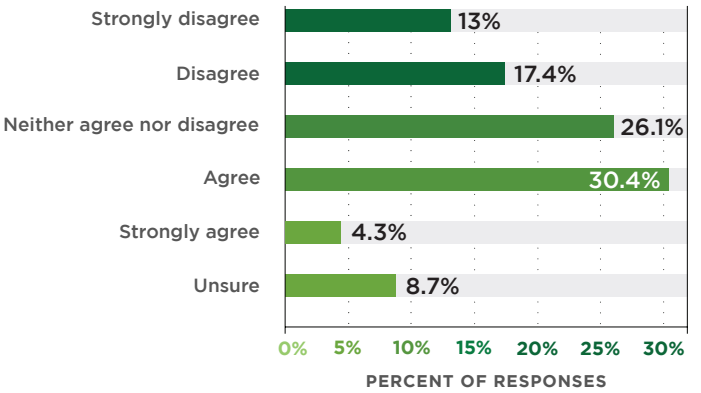
Child care was found to be lacking by almost 70% of survey respondents. Primarily, there is a lack in affordable and accessible child care for families of all income levels. Despite the proximity to Bozeman and Belgrade, families find it challenging to get to those communities for child care without a financial burden due to transportation costs. Additionally, there is a lack of child care options in those communities as well, choices are limited for all. The need for child care was especially acute for infants, with zero to two year old care being especially scarce. The most recent census data demonstrates there are over 100 children in Manhattan aged birth to five, and only 40 of them are currently enrolled in preschool. There are only

CHILD CARE

My community has childcare options for individuals and families of all income levels.

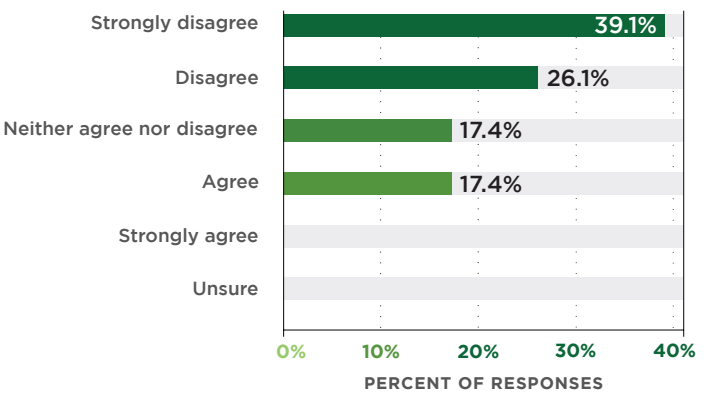


My community provides high quality early childhood education.



HEALTHCARE

My community has readily accessible, high-quality healthcare that is affordable for all income levels.



three licensed child care providers in Manhattan with the capacity to serve 45 children.

Healthcare

Once again healthcare ranked as one of the greatest perceived needs in the community of Manhattan, with 44% of survey takers indicating so. Over half of survey respondents thought the community lacked readily accessible, high-quality healthcare that is affordable for all income levels. When seeking medical treatment, residents of Manhattan often end up commuting to Belgrade or Bozeman to receive care.

Youth Needs

30% of Manhattan residents perceive that youth needs are a need in their community. 72% indicated that they do not feel their community has numerous enrichment opportunities for people of all ages.

Mental Healthcare

17% of Manhattan survey respondents indicated that they perceive mental healthcare as a need in their community. 52% of respondents feel that Manhattan lacks adequate resources for the mental health needs of youth. Additionally, 66% feel that their community lacks adequate resources for the mental health needs of adults.



Stakeholder Interviews

With respect to the demonstrated need for better transportation, one stakeholder said,

"...It's really difficult for families who have lived here or families that are moving here or individuals to afford housing in the area. I just got a call yesterday from somebody who said he's owned his home here for years and now he can't afford his taxes."

- Quote from Stakeholder

"Parents can't afford to pay more because housing does come into play here where child care can be, to have two children, can be more than your mortgage."

-Quote from Stakeholder

"We have twelve infants in there now with a waitlist of two years. I do see more availability for the three to six year old group but again affordability is tough because parents are on limited incomes so they can't necessarily afford child care and the child care providers can't even hire enough people because employment is so tough in our community right now."

-Quote from Stakeholder

Stakeholders confirmed that healthcare was an obstacle for community members.

"Ultimately when you talk about access to healthcare, the brick and mortar is less than a third of it. I think it's about getting people to make choices--to walk through a door, to pay that deductible. To take the chance that they're going to get a diagnosis or advice that's going to cost even more. So if they're struggling with how to pay rent, if they're struggling with how to pay for daycare, if they're struggling with how to pay for groceries. I think it's much more likely that somebody's going to delay care, somebody's going to ignore advice, somebody's not going to fill a prescription."

-Quote from Stakeholder

"We have to think about health as not a discreet thing we do when we go to the doctor's office but it's part of everything and I think HRDC does a pretty good job of that. And I think the leadership to keep doing that is really important."

-Quote from Stakeholder

Community Forums

Wednesday, October 9, 2019

Manhattan Senior Center

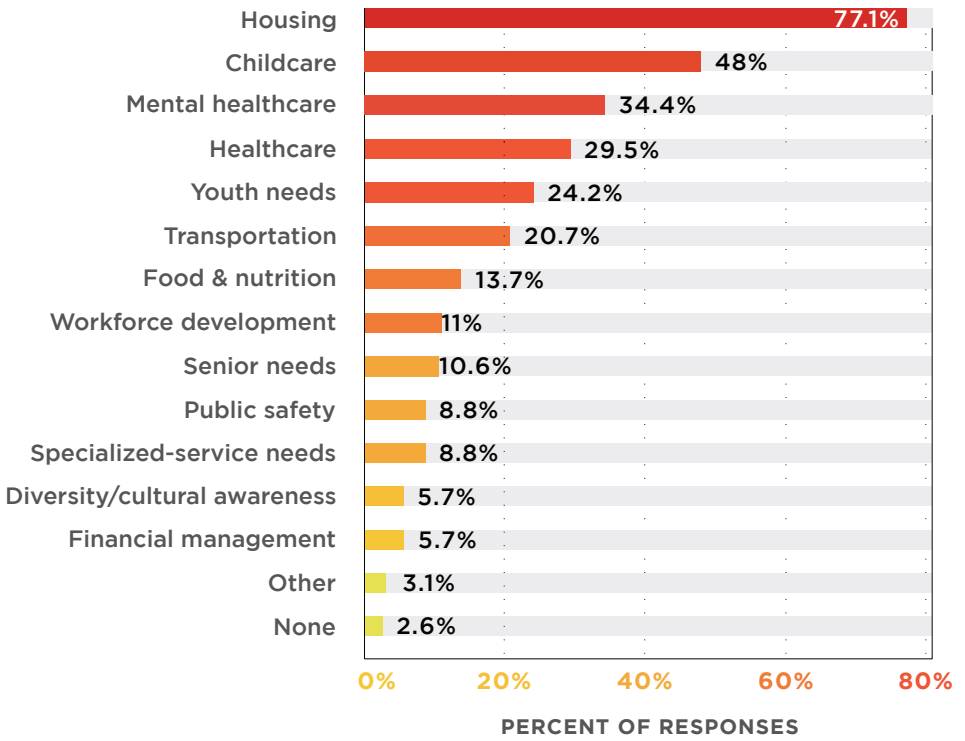
Community members agreed with the survey findings, saying housing costs have risen significantly in the past decade. This is partly due to a large influx of young families, who can't afford Bozeman and would like bigger lots than Belgrade has to offer. Participants in the Manhattan community forum said lack of affordable child care means families look toward friends and family members to babysit many children who end up at home alone. Legally, a child must be the age of 12 to be alone in their home but community members and law enforcement said that was difficult to enforce.



F. BELGRADE COMMUNITY PROFILE

ZIP CODE: 59741

Belgrade Area Needs



Survey respondents in Belgrade ranked the following top five areas in relative importance: *

1. Housing (77%)
2. Child Care (48%)
3. Mental Healthcare (35%)
4. Healthcare (30%
5. Youth Needs (24%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

258 survey responses were received in the Belgrade zip code (59714). More than three quarters of the survey respondents were female (84%) and most were between the ages of thirty and forty-nine. Close to ninety percent of respondents identified as Caucasian/White (89.7%). The monthly take home pay of respondents varied across all income levels, with about 15% making between $3,001 and $4,000 per month, 13% making between $2,501 and $3000 and 12.2% for both $1,501-$2000 and $4,001-$5,000.

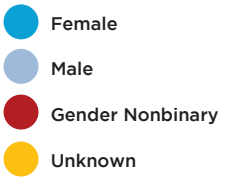
Customer Demographics

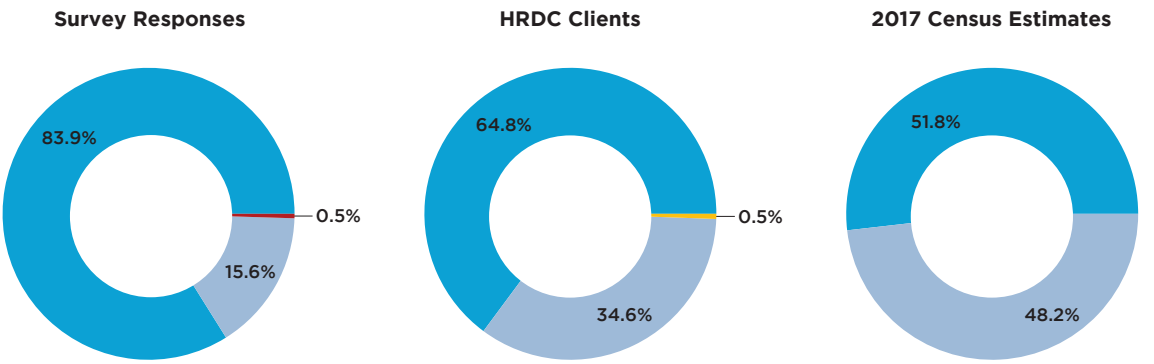
Consistent with our customer data, 67% of our Belgrade customers are white. Our customers in Belgrade are represented as 65% female and 35% male and the majority of customers that we serve are between the ages of thirty and thirty nine.

Census Demographics

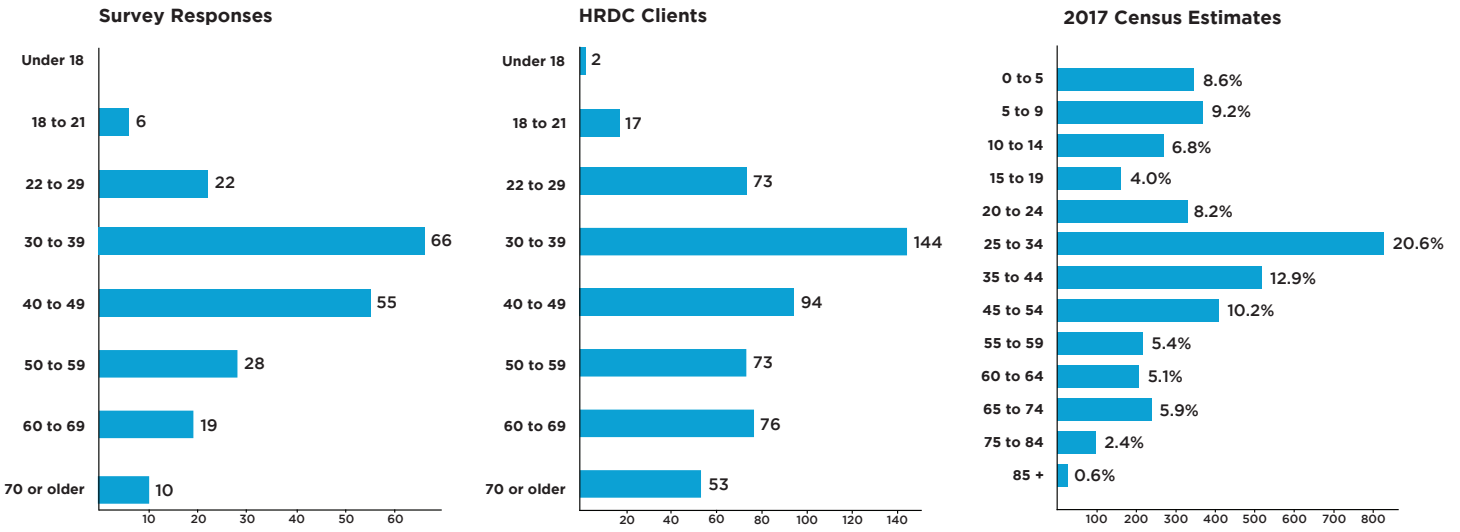
The median household income is $58,146. US Census estimates were more congruent with customer demographics than survey responses. Estimates show a population comprised of slightly more females than males (52%), and a large cohort of 25-44-year olds with a median age of 32.9.

GENDER





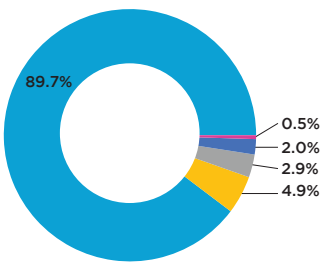
AGE RANGE



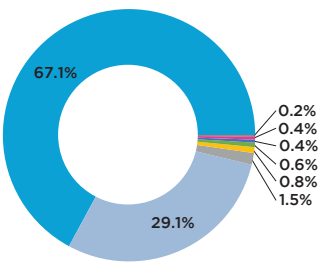
ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified

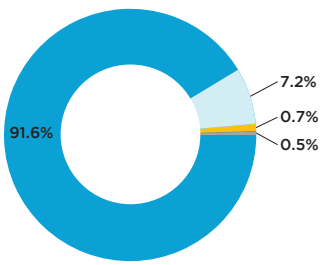
Survey Responses



HRDC Clients

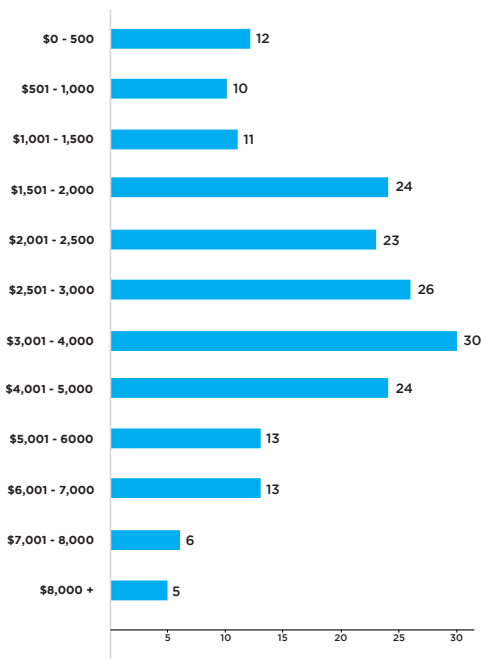


2017 Census Estimates

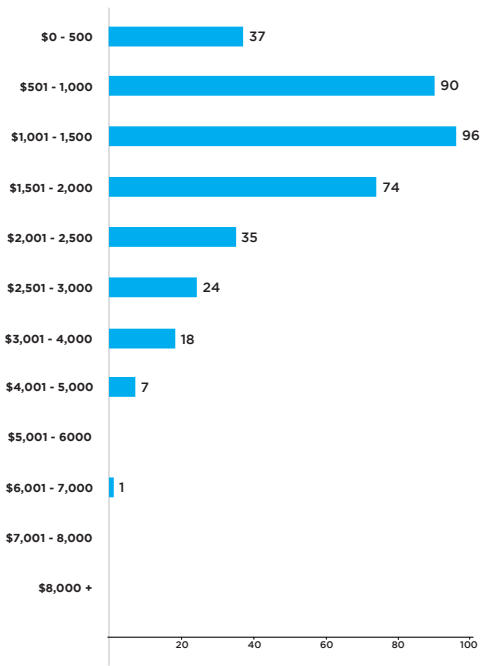


INCOME RANGE

Survey Responses



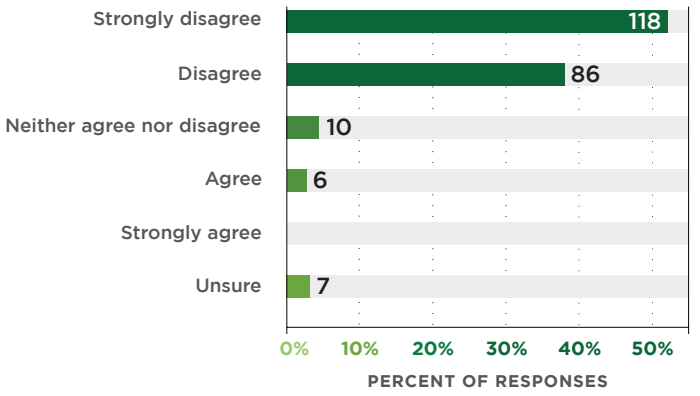
HRDC Clients



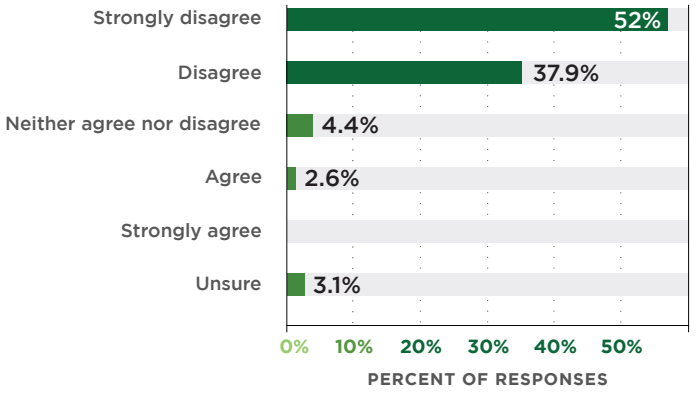


HOUSING

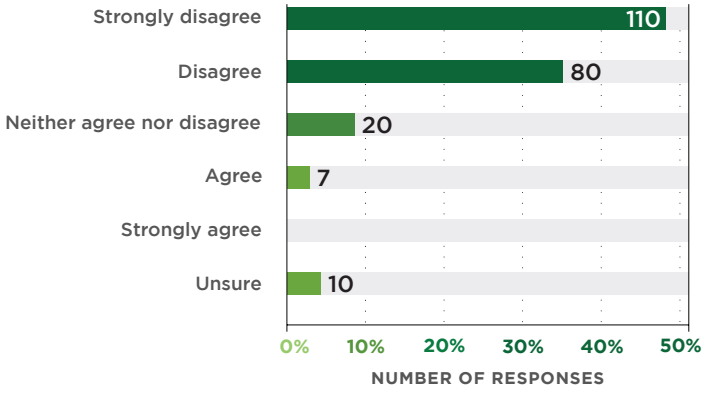
My community has a wide range of affordable housing options available.



My community has many affordable places to rent.



My community has many affordable home ownership opportunities.



Community Conditions

Like other communities in Gallatin County, Belgrade is struggling to handle the implications of rapid growth, particularly among households seeking affordable housing options outside of Bozeman. Workers in Bozeman that cannot find housing in the city often end up in Belgrade, with 20% of the Bozeman workforce commuting from Belgrade. However, sale prices in Belgrade are also increasing. The median sale price of a single-family home in Belgrade rose 83% from 2012 ($175,000) to 2018 ($320,000). Between 2016 and 2017, the population of Belgrade, MT grew from 1.93% (7,874 to 8,026) and its median household income grew 6.15% ($54,000 to $57,321).

Housing

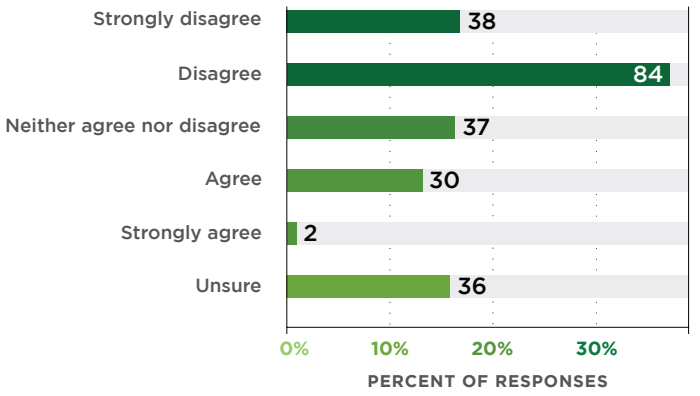
The cost of rent and housing was ranked as the most critical need by 175 respondents (77%) in the Belgrade community. This is consistent with the last needs assessment and overall survey responses. Renting options outranked home-ownership in terms of need. 92% of respondents felt Belgrade lacked many affordable places to rent whereas 84% felt Belgrade lacked many affordable home ownership opportunities.

Child Care

Child care ranked as the number two perceived need in Belgrade with 109 respondents (48%) indicating that they perceive a difficulty in finding child care and paying for child care. A little under half of respondents agreed that Belgrade has child care options for individuals and families of all income levels. The perceived need lies in lack of affordable child care options for individuals of all income levels, with 53% of respondents indicating there was a gap in affordable options in their community. Recent census data demonstrates that there are more than 600 children aged birth through five in the Belgrade community. In 2018 Belgrade had 30 licensed child care providers with the ability to provide 260 early childhood spots. Belgrade parents struggle with both the access to affordable and quality care to meet the needs of their community.

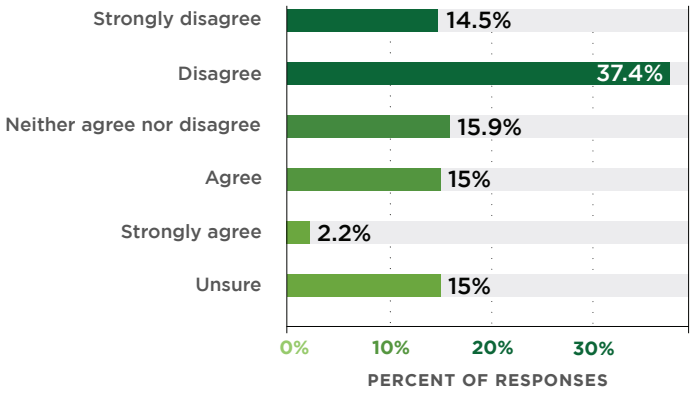
CHILD CARE

My community has childcare options for individuals and families of all income levels.

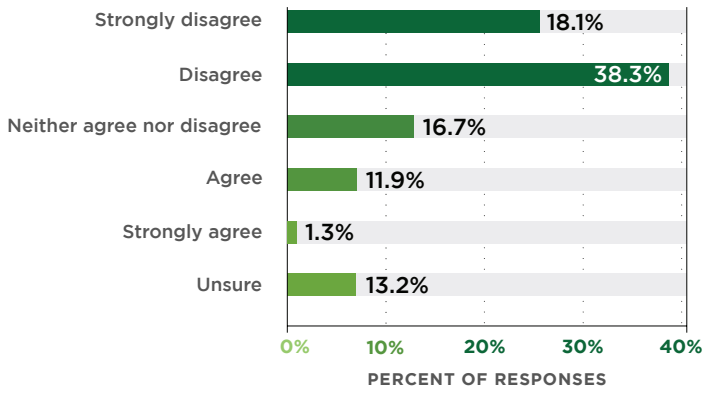


HEALTHCARE

My community has resources available for the mental health needs of adults.



My community has adequate resources available for the mental health needs of children and youth.



Mental Healthcare

Mental healthcare ranked third in perceived needs with 78 (34%) of respondents indicating this was an issue in their community. The mental health needs of children and youth were perceived as greater than that of adults, with 57% of survey respondents disagreeing that there were adequate resources available for the former and 52% for the latter.

Healthcare

30% of Belgrade survey respondents indicated that they perceive healthcare to be a need in their community. 52% indicated they do not feel their community has readily accessible, high quality healthcare that is affordable for all income levels.

Youth Needs

24% of Belgrade survey respondents indicated that they perceive youth needs to be a need in their community. 36% indicated that they feel that their community does not have enough enrichment opportunities for people of all ages. Many youth find it challenging to find activities to participate in outside athletics through the schools.

Stakeholder Interviews

Stakeholders echoed the survey's findings that housing was a significant problem for the community of Belgrade. Emergency shelter was perceived to be adequate, as most community members consider Bozeman and Belgrade as one community and are able to access the Bozeman Warming Center. One stakeholder emphasized the difficulty of attracting workers due to lack of permanent housing. Starter homes are very far out of reach, they commented, and home ownership is a big factor in long term financial security. They also commented that unlike Bozeman, Belgrade is lucky to be mixed socioeconomically and have no gated communities to speak of.

"A common experience is someone comes from somewhere else because there's jobs here but then they can't afford to live here. So they'll try to get their foot in the door and then look for more permanent housing."

- Quote from Stakeholder

Stakeholders echoed the survey's findings that housing was a significant problem for the community of Belgrade. One stakeholder emphasized the difficulty of attracting workers due to lack of permanent housing. Starter homes are very far out of reach, and home ownership is a big factor in long term financial security.

"Even now the starter homes in Belgrade are very far out of reach. There are some real large gaps for someone to secure an ownership option and build equity that bridges that. And they might spend the same amount of money over time but just have nothing at the end of that fifty year period."

-Quote from Stakeholder

Community forum attendees concurred with the results, adding that the population growth in Bozeman and its lack of affordable housing tends to spill into Belgrade, with an estimated 45% of workers in Belgrade commuting to Bozeman for work. Participants identified both a lack of units, citing a 0-1% rental rate, and cost that exceeded local wages.

Child care is also a burden to young families in Belgrade. One stakeholder said on average, parents pay $1000 a month for child care, $800 minimum. This coupled with the housing crisis makes it difficult to fill positions in the service industry in particular. One stakeholder said they are seeing restaurants desperate for help. The lack of scheduling predictability and breaks is difficult for parents with young children. The Head Start in Belgrade is great for families but the Bozeman-Belgrade area is growing so rapidly, people are being pushed farther out and they would like to see Head Start opportunities outside of Belgrade and Bozeman.

Child care is also a burden to young families in Belgrade. One stakeholder said on average, parents pay $1000 a month for child care, $800 minimum. This coupled with the housing crisis makes it difficult to fill positions in the service industry in particular.

"We just hired a person who's moving from the Puget Sound area of Washington. child care costs more here than there if you can find it. The least I know anybody's paying for child care is about $800 a month. We hear about $1000 a month. And in this case this person finally gave up and moved their mother-in-law out from Washington to take care of them. We're seeing restaurants that are desperate for help. Some of that has to do with the type of employment and lack of scheduling predictability. Although recently I talked to people who are working fast food jobs and their problem is they can't get any breaks. They're scheduled all the time."

-Quote from Stakeholder

Participants in the Belgrade community forum pointed to the lack of daycare openings and high rents and low wages as exacerbating the cost of child care. Young mothers are most affected, they said, often bringing children to work or being forced to stay home. As with other communities, infant care is the most critical, with Head Start not beginning until age three.

In regards to mental healthcare providers, stakeholders commented that there were far less options in Belgrade than in Bozeman. This is coupled with a greater stigma and lack of anonymity due to it being a small community.

"I think there is more services in Bozeman so when you get a little bit outside Bozeman, even thirteen miles to Belgrade, there are less services, and there's kind of more of a stigma just because there's less familiarity and less access to discussions around behavioral health."

-Quote from Stakeholder

Community Forums

Monday, September 23, 2019 - Belgrade Community Library

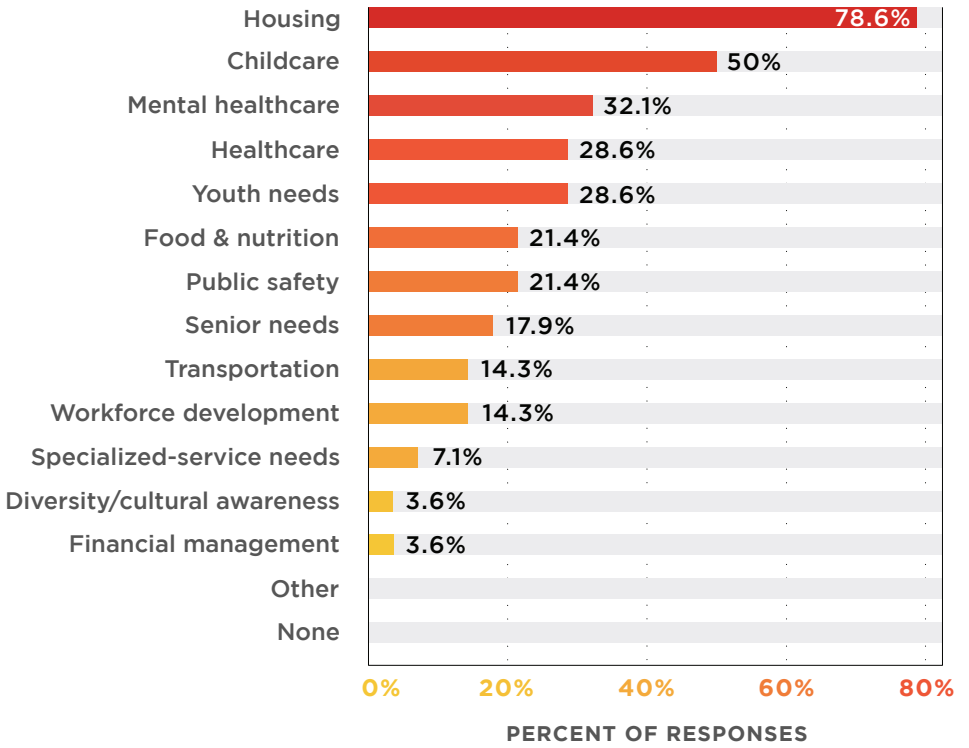
Thursday, October 24, 2019 - Belgrade Community Library

Community forum attendees concurred with the results, adding that the population growth in Bozeman and its lack of affordable housing tends to spill into Belgrade, with an estimated 45% of workers in Belgrade commuting to Bozeman for work. Participants identified both a lack of units, citing a 0-1% rental rate, and cost that exceeded local wages. Participants in the Belgrade community forum pointed to the lack of daycare openings and high rents and low wages as exacerbating the cost of child care. Young mothers are most affected, they said, often bringing children to work or being forced to stay home. At the forum, community members discussed the shortage of mental healthcare workers in Belgrade and lack of insurance coverage. Even for community members willing to drive to Bozeman to seek mental healthcare services, many still struggle to find providers that accept Medicaid.

G. THREE FORKS COMMUNITY PROFILE

ZIP CODE: 59752

Three Forks Area Needs



Survey respondents in Three Forks ranked the following top five areas in relative importance: *

1. Housing (79%)
2. Child Care (50%)
3. Mental Healthcare (32%)
4. Healthcare (29%)
5. Youth Needs (29%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

258 survey responses were received in the Belgrade zip code (59714). More than three quarters of the survey respondents were female (84%) and most were between the ages of thirty and forty-nine. Close to ninety percent of respondents identified as Caucasian/White (89.7%). The monthly take home pay of respondents varied across all income levels, with about 15% making between $3,001 and $4,000 per month, 13% making between $2,501 and $3000 and 12.2% for both $1,501-$2000 and $4,001-$5,000.

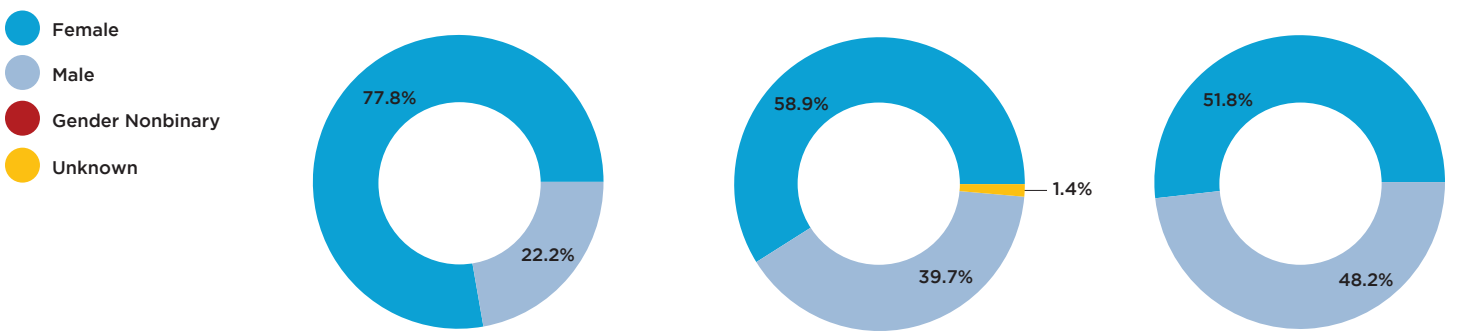
Customer Demographics

Consistent with our customer data, 67% of our Belgrade customers are white. Our customers in Belgrade are represented as 65% female and 35% male and the majority of customers that we serve are between the ages of thirty and thirty nine.

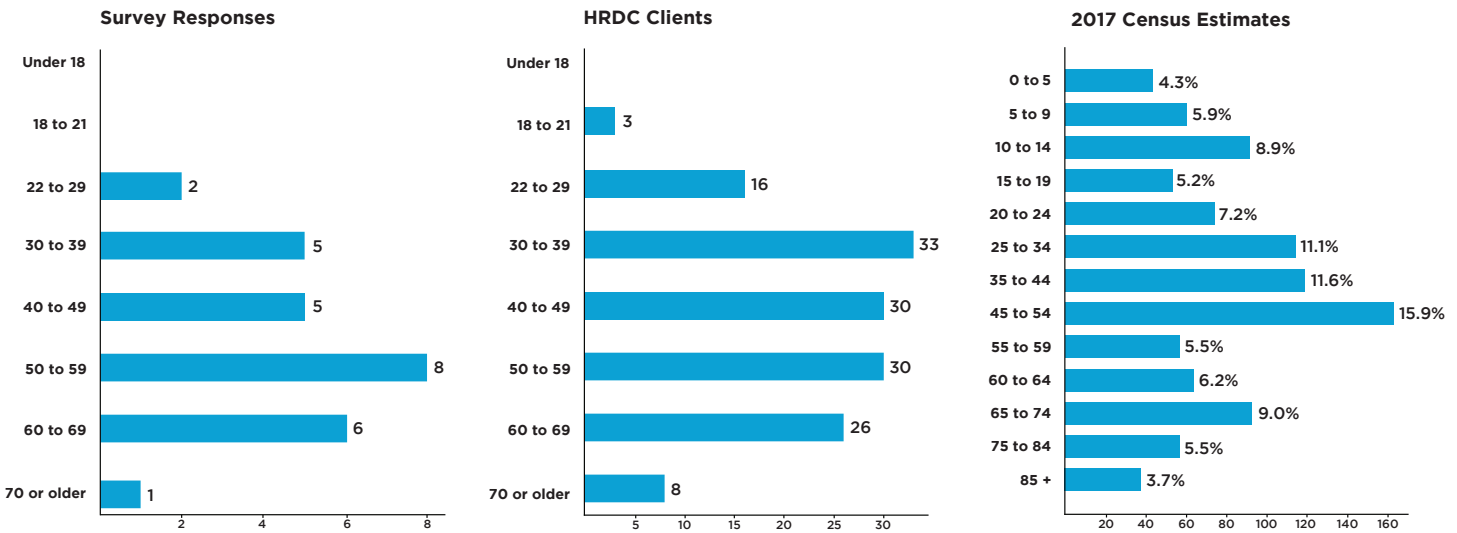
Census Demographics

The median household income is $58,146. US Census estimates were more congruent with customer demographics than survey responses. Estimates show a population comprised of slightly more females than males (52%), and a large cohort of 25-44-year olds with a median age of 32.9.

GENDER



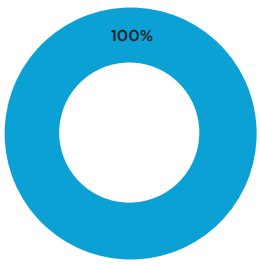
AGE RANGE



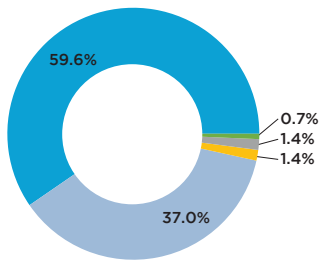
ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified

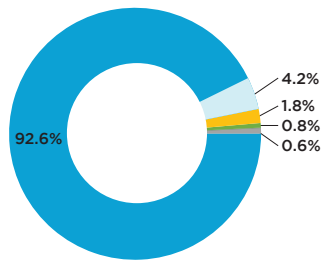
Survey Responses



HRDC Clients

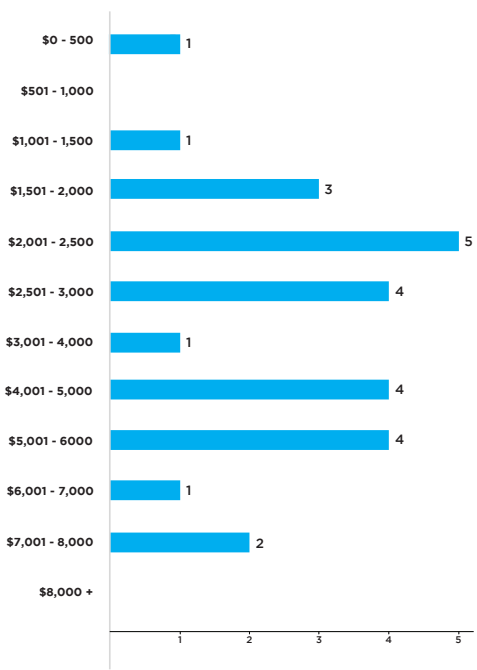


2017 Census Estimates

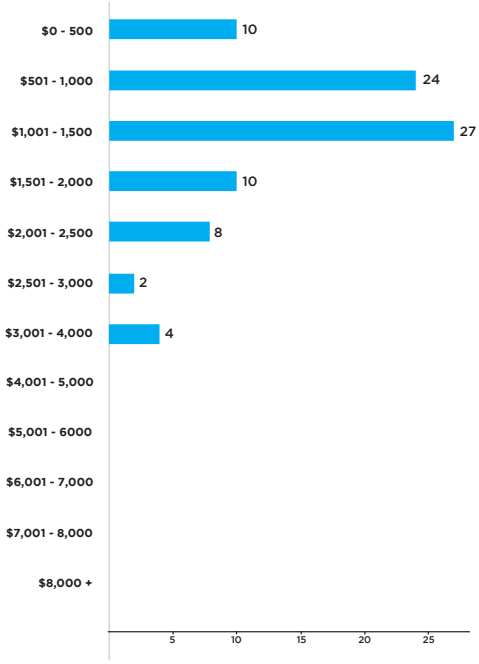


INCOME RANGE

Survey Responses



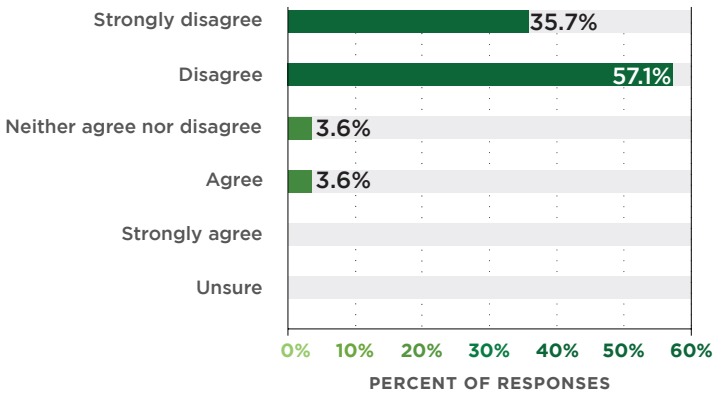
HRDC Clients



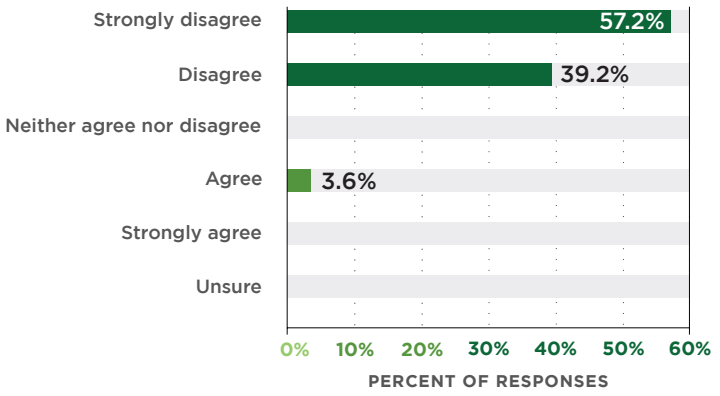


HOUSING

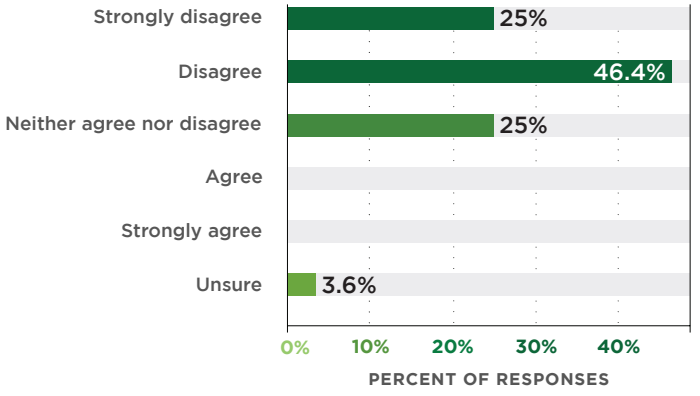
My community has a wide range of affordable housing options availabe.



My community has many affordable places to rent.



My community has many affordable home ownership opportunities.



Community Conditions

Three Forks is located on the northwestern edge of Gallatin County. The community is represented by the zip code 59752. It had a modest population of 2,046 in 2017, which is a 1.78% decrease from the previous year. However, Three Forks serves as a hub and provides services for many rural communities in the area including Pony, Harrison, Willow Creek, Logan and Clarkston. The community of Three Forks exists in a flood plain creating a whole slew of development issues for the community. Additionally, there are large square footage requirements for single family homes creating financial barriers as well.

Three Forks, like many Southwest Montana communities, is also experiencing a housing supply deficit. Housing stock is limited in both quality and quantity. Many seniors and young adults are priced out of the limited market, though housing prices have grown slightly slower than in surrounding communities, at a 61% increase for single-family homes in Three Forks between 2012 and 2018.

Housing

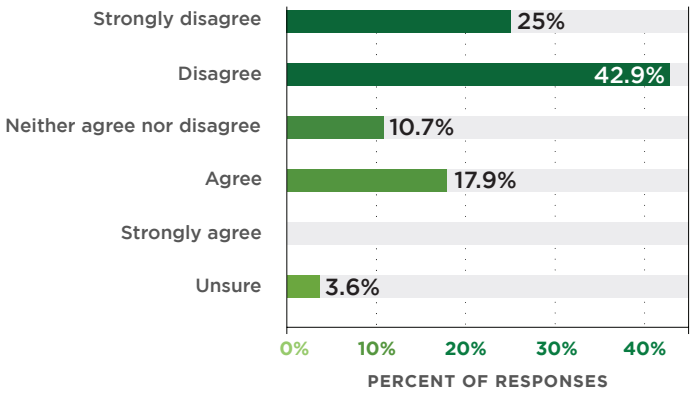
Housing surfaced as the most critical perceived need in the Three Forks community with 79% of survey respondents rating it as number one. A staggering 96% of respondents disagreed that Three Forks has affordable places to rent. 93% of all respondents disagreed that Three Forks offered affordable home ownership opportunities as well. Through the survey and conversation with community members, home ownership in Three Forks and Gallatin County was consistently perceived to be less of a need than renting. The priority in the community is to create more affordable rental options for residents.

Child Care

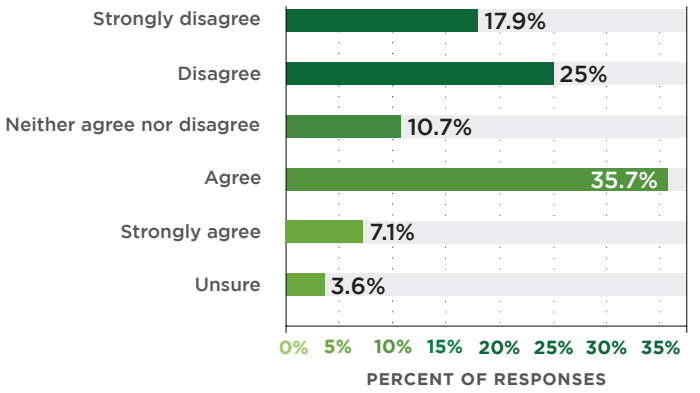
Child care was perceived to be lacking by 50% of all survey responders. 68% disagreed that Three Forks has child care options for individuals and families of all income. 43% disagreed that their community provides quality early childhood education, emphasizing cost over quality. The town of Three Forks estimates to have nearly 100 children between the ages of birth to five, data from 2018 demonstrated that only 16 of those children

CHILD CARE

My community has childcare options for individuals and families of all income levels.



My community provides high quality early childhood education.



were enrolled in care. There are four licensed child care providers in the town, however as of 2018 none of these providers accepted child care scholarships, placing a burden on low income families to find affordable care.

Mental Healthcare

Respondents found mental healthcare to be the third perceived need in Three Forks. 32% of responders ranked it as a top need putting it significantly below housing and child care. The mental health needs of youth and children was ranked as the most pressing need. 68% of respondents think Three Forks lacks adequate resources for the mental health needs of children and youth whereas 64% believe the community lacks adequate resources for the mental health needs of adults.

Healthcare

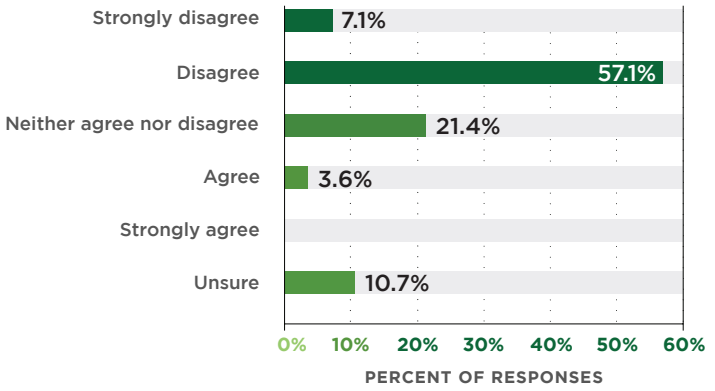
29% of Three Forks survey respondents indicated that they perceive healthcare to be a need in their community. 47% of survey respondents indicated that they perceive that their community lacks readily accessible, high-quality healthcare affordable for all income levels.

Youth Needs

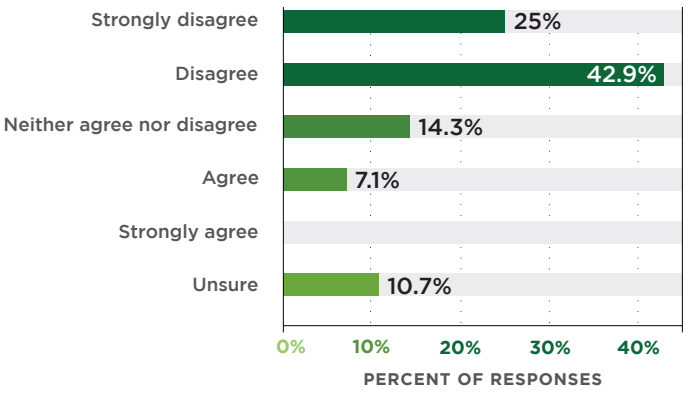
29% of Three Forks survey respondents indicated that they perceive youth needs to be a need in their community. 47% of community members indicated that they did not think that their community has numerous enrichment opportunities for people of all ages.

HEALTHCARE

My community has resources available for the mental health needs of adults



My community has adequate respurces available for the mental health needs of children and youth.



Stakeholder Interviews

Because Three Forks is surrounded by water, there is little room to expand real estate and what currently exists is at risk of flooding. One stakeholder discussed the correlation between land availability and housing costs, saying:

"We're just about out of land. There's a lot of obstacles to overcome."

- Quote from Stakeholder

Three Forks recently lost a large daycare provider, but according to one stakeholder, another daycare provider is opening in the basement of the public library with 10-12 slots, although they claim it isn't cheap.

"There's no such thing as paying a babysitter fifty cents an hour."

- Quote from Stakeholder



Stakeholders noted a significant decline in healthcare services as compared to previous years. The decrease in services offered tends to have a cascading impact on Community Health Partners, Montana State University, emergency rooms and the Bozeman community as a whole, they said.

"I think if you have a stomach-ache or a back ache or a foot ache, or you have a cough you can't shake, you can find a provider to diagnose you and treat you in this community. If you are suffering from depression or anxiety or schizophrenia I think there's a genuine inability to find access to certain services."

- Quote from Stakeholder

Community Forums

September 25, 2019 - Three Forks Community Library

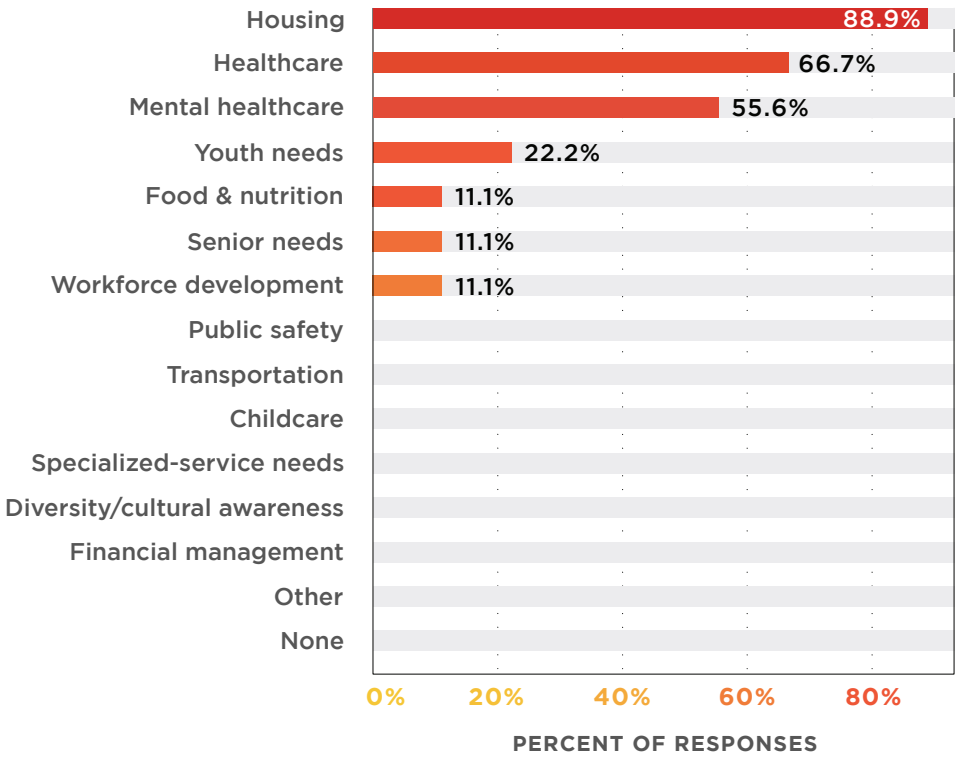
Community forum attendees agreed that housing was a top need, noting that on average a three bedroom costs $1,000 a month. Child care is a struggle for parents in the area; they agree that the small daycares don't fulfill the community's need. Participants also spoke to the lack of mental healthcare services, as there are no therapists located in Three Forks. Residents seeking healthcare services must commute to Bozeman. Lastly, because of Three Forks lack of healthcare related services, residents are forced to drive to other communities for care. Community members feel there is a lack of public transit options to get them out of town and to services.



H. WEST YELLOWSTONE COMMUNITY PROFILE

ZIP CODE: 59758

West Yellowstone Area Needs



Survey respondents in West Yellowstone ranked the following top five areas in relative importance: *

1. Housing (89%)
2. Healthcare (67%)
3. Mental Healthcare (56%)
4. Youth Needs (22%)
5. Food & Nutrition (11%)

   Workforce Development (11%)

   Senior Needs (11%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

9 survey responses were received in the West Yellowstone zip code (59030). Three quarters of the survey respondents were female (75%) and half of respondents were between the ages of 40 and 49 (50%). One hundred percent of respondents were Caucasian/White (100%).The monthly take home pay of respondents varied between $1,501 per month and $6,000 per month. Most of the respondents were married or cohabitating with a partner (88%).

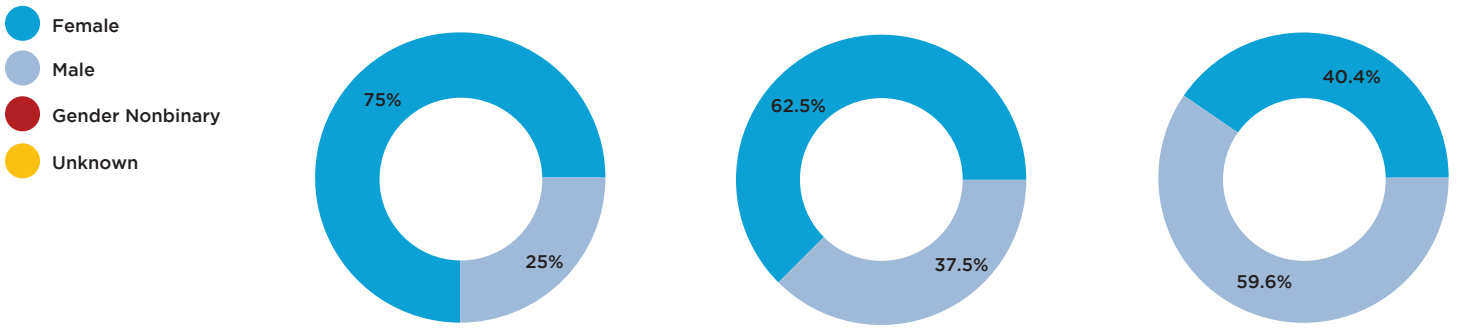
Customer Demographics

Consistent with our survey respondents, HRDC customers in West Yellowstone were predominantly female (62%). Inconsistent with our survey respondents, the majority of our customers were over the age of 70. HRDC customers in West Yellowstone made between $501 and $2500, monthly.

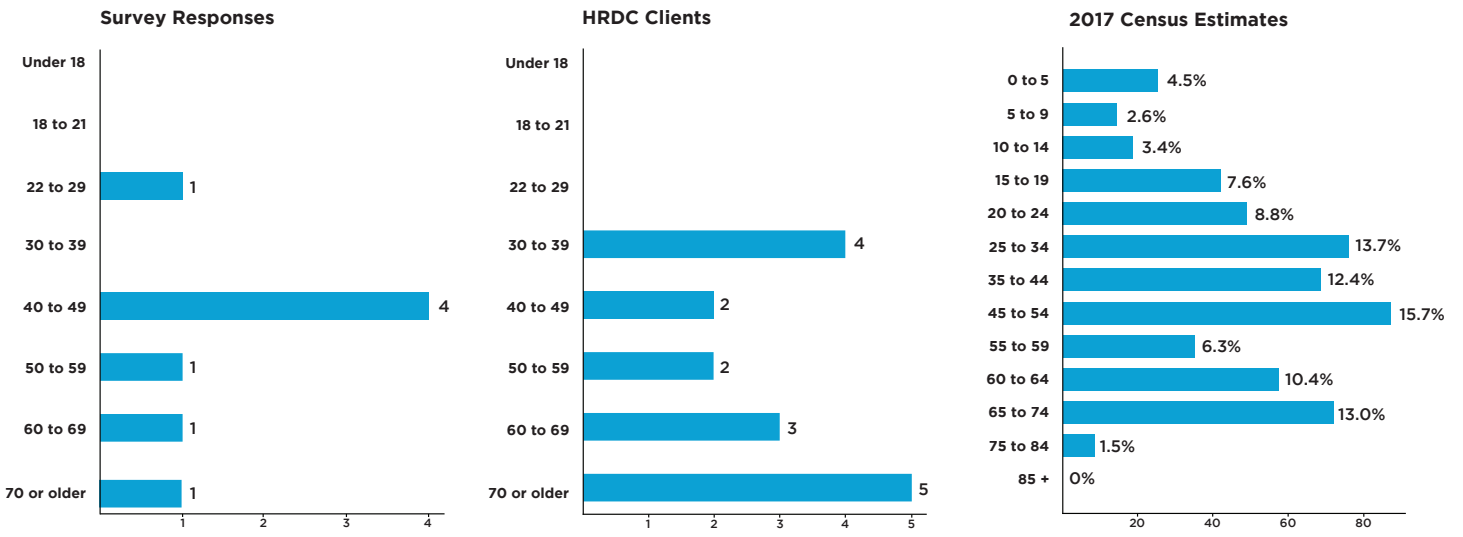
Census Demographics

Census estimates were more aligned with our survey respondents than customer demographics. The median age in West Yellowstone is 44.

GENDER



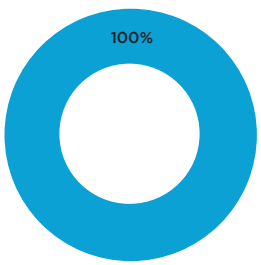
AGE RANGE



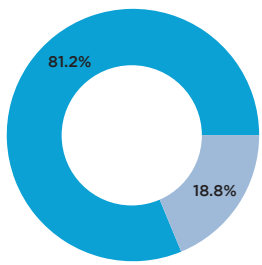
ETHNICITY

- White
- Black/African American
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Hispanic or Latino
- Multi Race
- Other
- Asian
- Unspecified

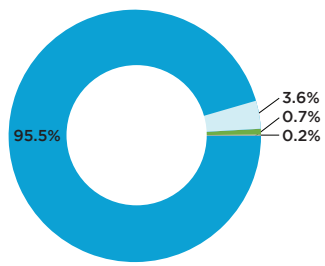
Survey Responses



HRDC Clients

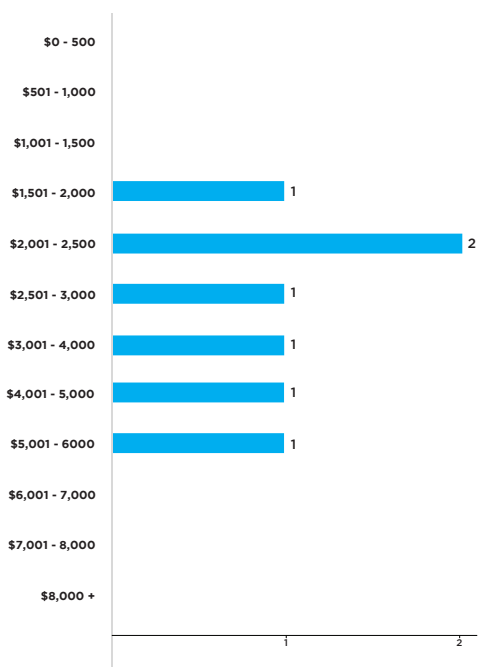


2017 Census Estimates

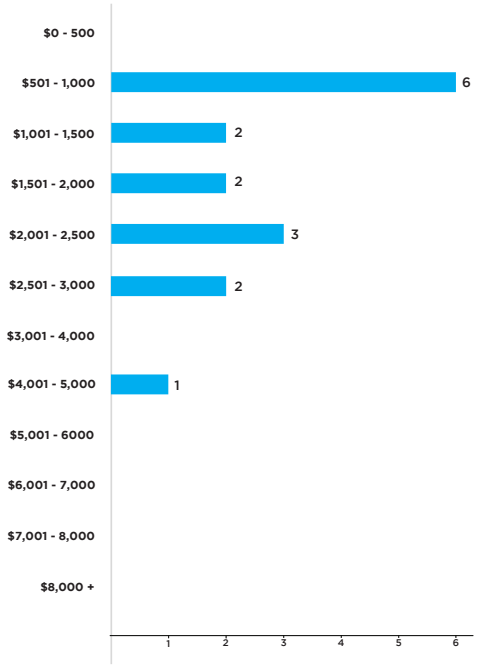


INCOME RANGE

Survey Responses



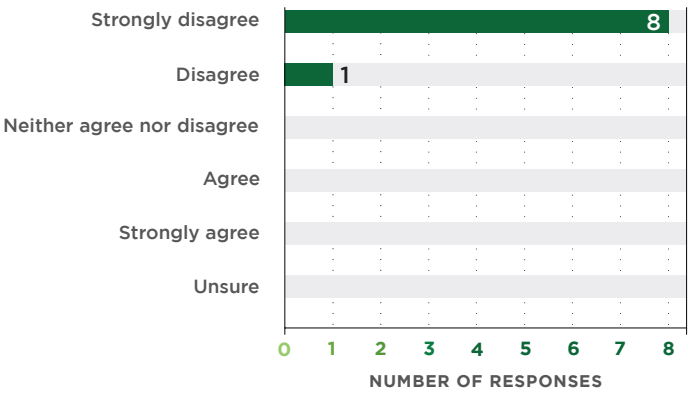
HRDC Clients



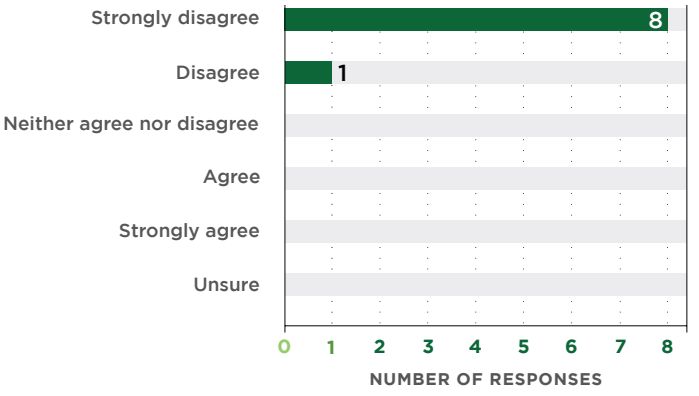


HOUSING

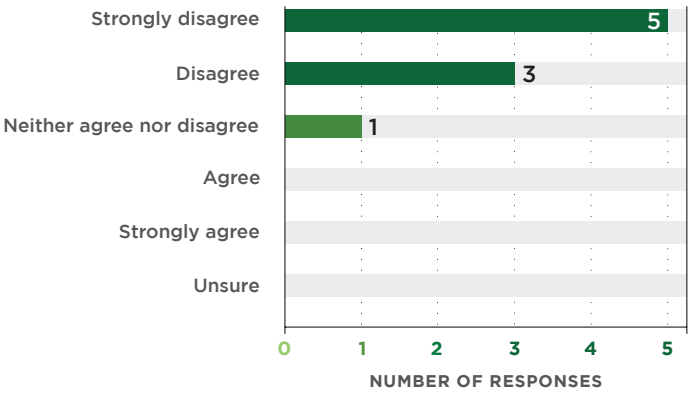
My community has a wide range of affordable housing options available.



My community has many affordable places to rent.



My community has many affordable home ownership opportunities.



Community Conditions

Similar to Gardiner, West Yellowstone is a seasonal, tourism-focused community and continues to experience challenges relating to housing.The town is relatively small itself, with about 1400 residents. However, due to its proximity to the west entrance of Yellowstone National Park, the town experiences a significant influx of visitors during the summer and winter months.

Because land is in short supply and the existing housing stock is in need of significant repair, West Yellowstone desperately struggles to meet the demand for affordable housing. There are opportunities on the horizon with the purchase of 80 acres west of town.

Housing

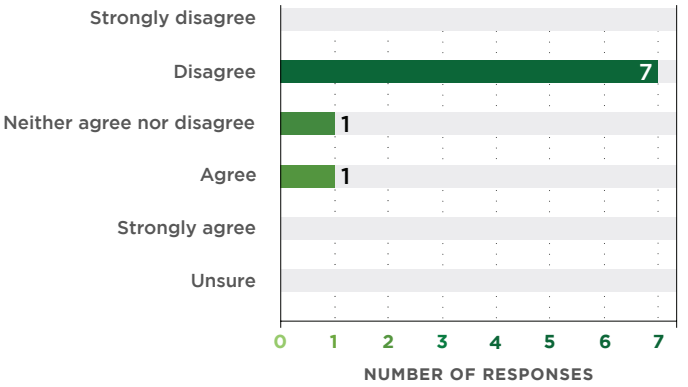
Similar to the other communities we surveyed, housing was identified as the number one most pressing need in West Yellowstone. Rentals and home ownership opportunities are both perceived to be lacking in West Yellowstone. For example, 88% of respondents strongly disagreed that there are affordable places to rent in their community. Respondents also believe there is a lack of home ownership opportunities in West Yellowstone, with 89% of respondents disagreeing that their community had affordable home ownership opportunities.

Healthcare

In addition to housing, healthcare is also a top need in West Yellowstone, with six survey respondents identifying it as one of their top three needs. Furthermore, seven of the nine survey respondents either disagreed that their community has readily accessible, high-quality healthcare (78%). When asked what specific healthcare-related need they had difficulty with this past year, four respondents said "access to general medical care" (50%). "Enrollment in health/dental insurance" was the second most selected health-care related need (25%). With regards to healthcare access, general physical care was identified as the most frequently answered health-related service that West Yellowstone residents had difficulty accessing in the past year.

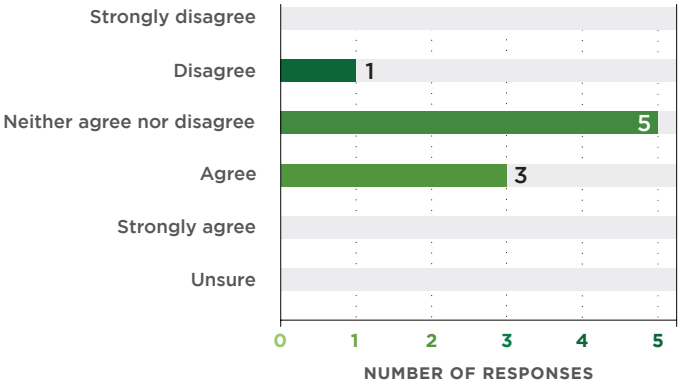
MENTAL HEALTHCARE

My community has resources available for the mental health needs of adults.



COMMUNITY

My community is welcoming and inclusive a public meetings and community events.



Mental Healthcare

HRDC identified mental healthcare as the third most pressing need in West Yellowstone, with five survey respondents identifying it as one of their top three needs (55%). Furthermore, eight survey respondents either disagreed or strongly disagreed that their community has adequate resources available for the mental health needs of children and youth (88%). Seven respondents also disagreed that their community has resources available for the mental health needs of adults (78%).

When asked what specific mental health needs that they had difficulty with this past year, four respondents said depression. Anxiety was the second most selected mental health need. With regards to mental and general healthcare access, general physician care was the most selected health-related service, while psychiatric care and counseling services were the second most frequently selected services.

Youth Needs

22% of West Yellowstone survey respondents indicated that they perceive youth needs to be a pressing need in their community. 22% also felt that their community lacks enrichment opportunities for people of all ages.

Food and Nutrition, Workforce Development, Senior Needs

There was a tie for the fifth perceived need in West Yellowstone with Food and Nutrition, Workforce Development, and Senior Needs also surfacing with 11% perceived need. As it relates to food and nutrition, 13% of survey respondents indicated that their community lacks adequate resources for individuals who need access to food, clothing, technology, and/or shelter. 66% of community members felt that their community lacks affordable places to buy healthy food. 44% of survey respondents felt that their community lacks financial management resources, including lack of help in finding employment. 22% of survey respondents felt that their community lacks resources for those searching for employment, such as help with resume building, interview preparation, up-to-date job boards, and employment application assistance. As it relates to senior needs, 33% of survey respondents felt that the community of West Yellowstone lacks adequate care and resources for individuals 65 and older.

Stakeholder Interviews

With respect to the demonstrated need for better healthcare access in West Yellowstone and other rural areas, one stakeholder stated,

"I think there is more services in Bozeman so when you get a little bit outside Bozeman, even thirteen miles to Belgrade, there's less services, and there's kind of more of a stigma just because there's less familiarity and less access to discussion around behavioral health...So it gets harder and harder the farther you go from Bozeman or any larger city in Montana."

- Quote from Stakeholder

When asked about transportation, a West Yellowstone stakeholder said,

"We have had and still have twice a week transportation from West Yellowstone to Bozeman and we are lucky, we have a very nice driver, a very accommodating driver and he'll take you from the hospital there, all over Bozeman."

- Quote from Stakeholder

Community Forums

Wednesday, October 16, 2019 - Povah Community Center

During the community forum held in West Yellowstone, residents echoed the need for more affordable housing by stating there are currently too many Airbnbs and vacation rentals. Landlords can often make more money by renting out their units to visitors rather than community residents. When individuals can find a place to rent, the rent is often too high for your potential return as many units are old and in a state of disrepair. Many families are forced to live in a one bedroom apartment due to the high prices of rent. Furthermore, since West Yellowstone is a seasonal community, many seasonal workers are forced to camp during the summer months because they cannot find an affordable place to live.

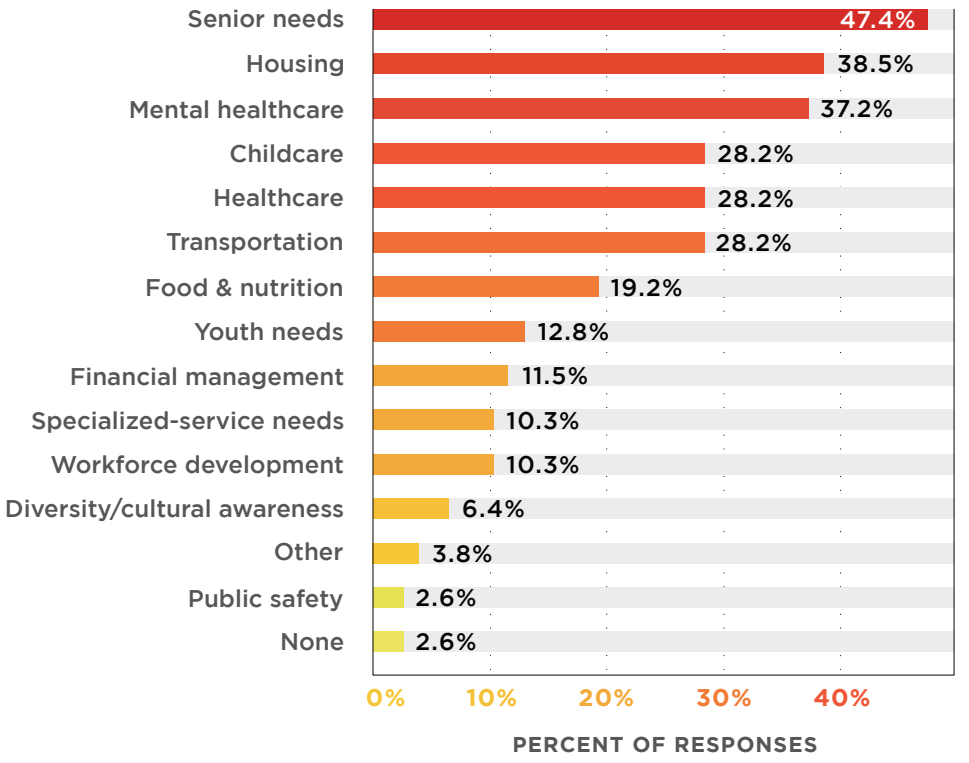
Community members also mentioned healthcare as a top community need, specifically by stating the need for urgent care. They claimed that the Big Sky Hospital is not sufficient for the needs of West Yellowstone residents.

Mental healthcare was also discussed as a community need. While residents believe that the stigma surrounding mental health is improving and people are talking about it more, additional work still needs to be done. Specifically, residents stated the need for more mental healthcare staff and care opportunities in West Yellowstone.

I. WHITE SULPHUR SPRINGS COMMUNITY PROFILE

ZIP CODE: 59645

White Sulphur Springs Area Needs



Survey respondents in White Sulphur Springs ranked the following top five areas in relative importance: *

1. Senior Needs (48%)
2. Housing (39%)
3. Mental Healthcare (38%)
4. Child Care & Healthcare (29%)
5. Transportation (29%)

** Survey respondents were able to choose multiple needs. The data shown reflects the percentage of respondents who selected any given need.*



Demographics

Needs Assessment Survey

The zip code encompassing the area surrounding White Sulphur Springs is 59645. There were 77 surveys received in this geographic area. 36 respondents were between the ages of 22 and 49 and 53% of respondents were over the age of 50. 71% of survey respondents were female, 24% were male.

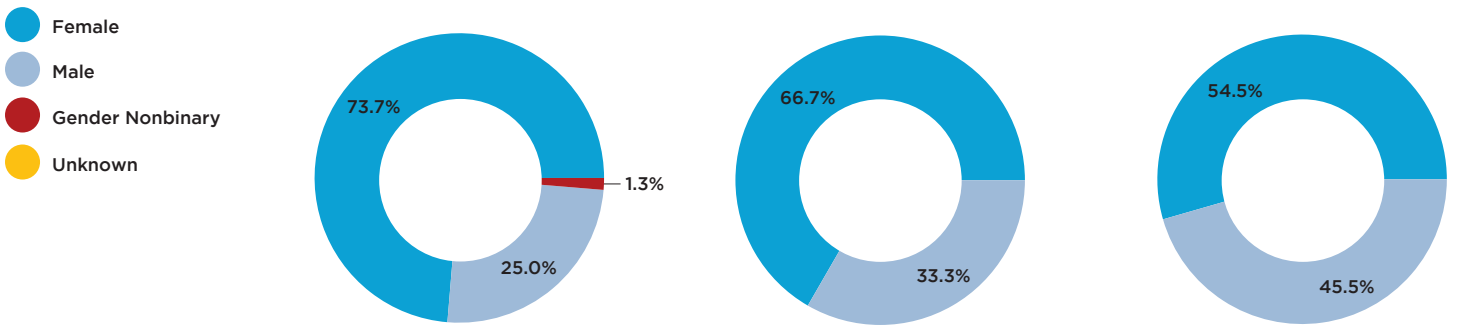
Customer Demographics

96% of the customers that we serve in White Sulphur Springs are white. Majority of the customers that we serve make between $501 and $1500 monthly. 66% of the customers that we serve are female, while 33% are male.

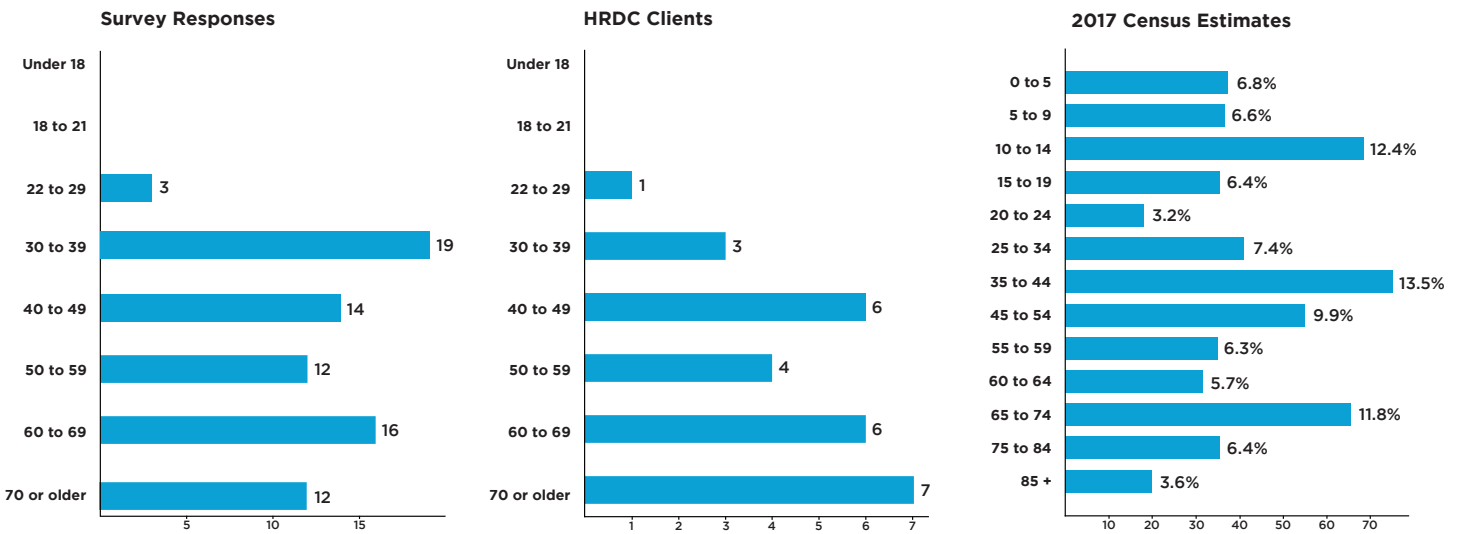
Census Demographics

The population of White Sulphur Springs is just over one thousand residents. The median age in White Sulphur Springs is 42. Consistent with our survey and customer demographics, the majority of the population is female (54%). The median household income is $34,219.

GENDER

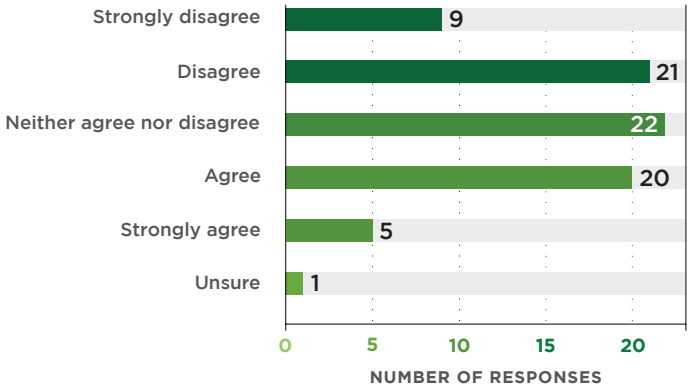


AGE RANGE

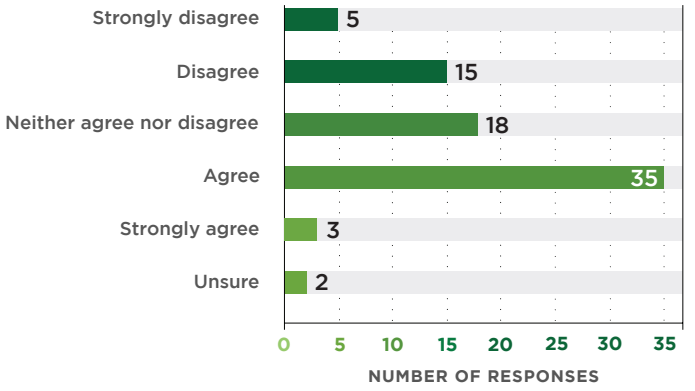


SENIOR NEEDS

My community provides adequate care and resources for individuals 65 and over.



My community is welcoming and inclusive a public meetings and community events.





Community Conditions

White Sulphur Springs is the only incorporated community in Meagher County. Uniquely, the number one perceived need in the community of White Sulphur Springs was senior needs. With a predominantly aging and retired population in White Sulphur Springs, there is quite a lot of conversation around lack of resources and opportunities for seniors. Despite not surfacing as a priority need in the community, lack of child care is a concern for many in White Sulphur Springs. In 2018, there were zero licensed child care providers in White Sulphur Springs.

White Sulphur Springs is facing a housing shortage due to a lack of affordable housing in the area. According to our survey results, as well as the community forum discussion, there is housing in the immediate area, however; it is old and of disparaging quality. Many of the homes in White Sulphur Springs are old and in need of repair; the cost associated with these repairs is immense and not feasible for many residents. This presents an issue as residents are forced to look for homes outside of the city limits.

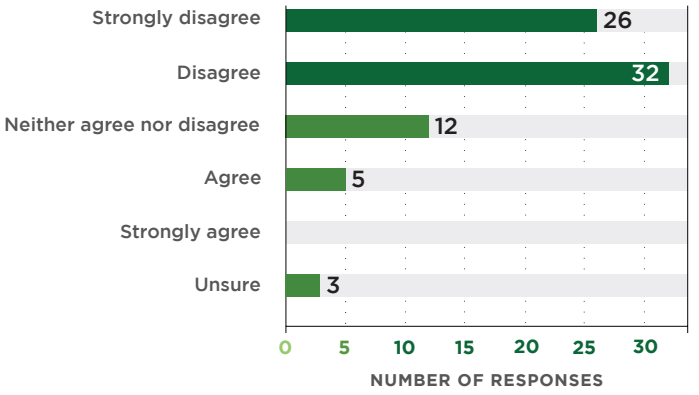
Lastly, White Sulphur Springs is still facing a dependable public transportation problem. Many residents feel that there are virtually no options for getting around town, let alone out of town to larger communities to receive services. This sentiment is particularly felt due to the aging population of this community and their reliance on public transportation to get around.

Senior Needs

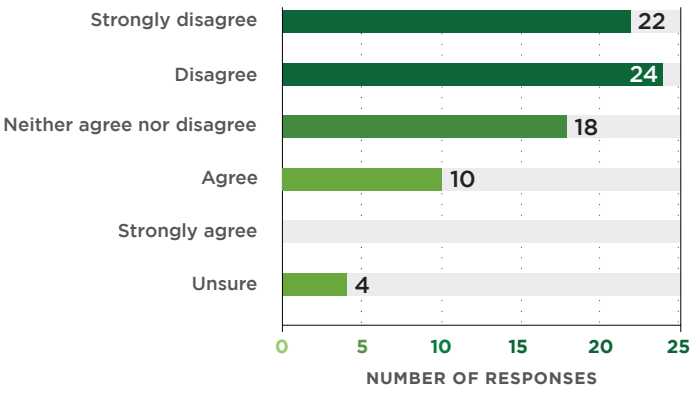
Unlike any other community in the tri-county service area, White Sulphur Springs number one perceived need was senior needs, with 48% of survey respondents indicating this was the number one perceived need in the community. For the purposes of our survey, senior needs were defined as feelings of social isolation, in-home help, and service opportunities. 55% of survey respondents indicated that they felt the White Sulphur Springs community did not offer enough enrichment opportunities to people of all ages.

HOUSING

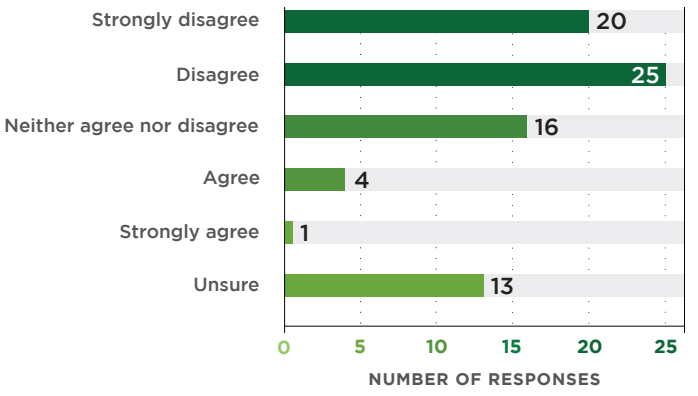
My community has many affordable places to rent.



My community has many affordable home ownership opportunities.



My community has resources available for those experiencing homelessness.



Housing

39% of survey respondents in White Sulphur Springs perceive housing to be a need in their community. 74% of survey respondents indicated that their community lacks affordable places to rent, while 60% feel it also lacks affordable housing options. Many locals claim that the available housing in their community is in a state of disrepair.

Mental Healthcare

Mental healthcare surfaced as the number three perceived need in White Sulphur springs with 29 respondents (38%) perceiving this to be an issue in their community. 70% of community members indicated that they disagreed that there were adequate resources in their community for the mental health needs of children. Similarly, 69% of respondents disagreed that there were adequate resources for the mental health needs of adults.

Healthcare

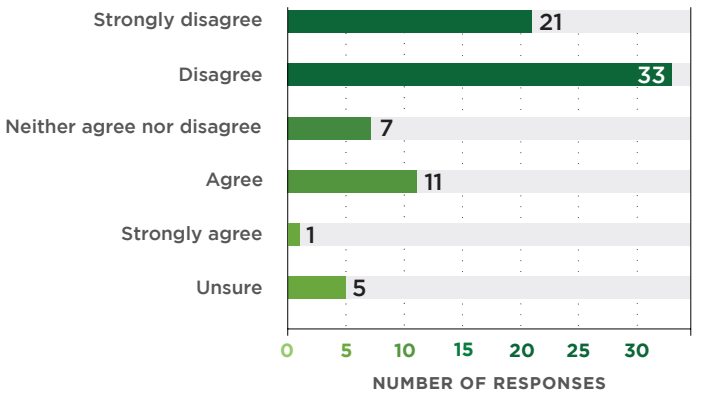
29% of White Sulphur Springs survey respondents indicated that they perceive healthcare to be a priority need in their community. 53% felt that their community lacked readily accessible, high quality healthcare that is affordable for all income levels in their community.

Transportation

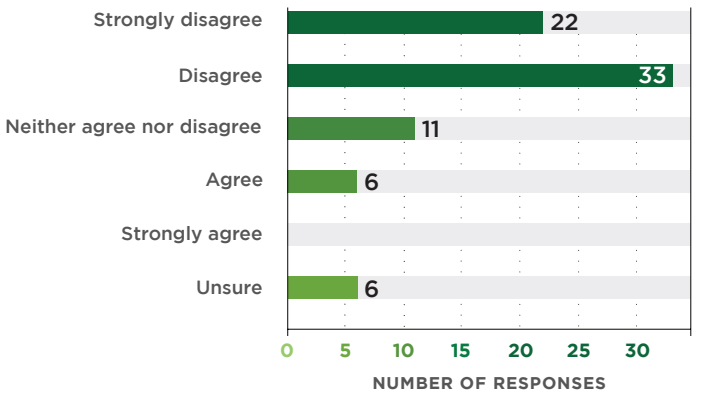
29% of survey respondents indicated that they perceive transportation to be a pressing need in their community. A staggering 84% of community members felt that their community lacks sufficient public transportation options. White Sulphur Springs is positioned over 70 miles from the nearest town, making it very challenging for residents to access resources.

MENTAL HEALTH

My community has resources available for the mental health needs of adults.

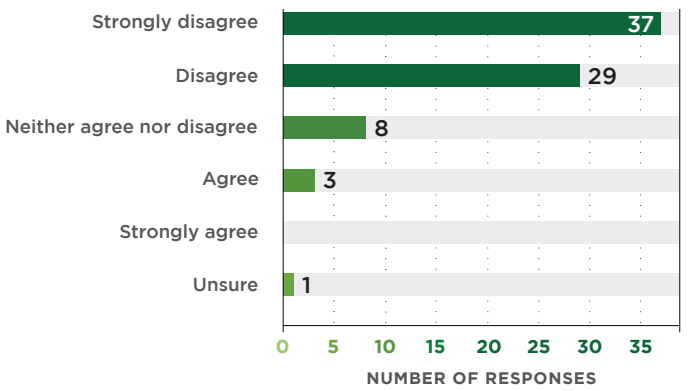


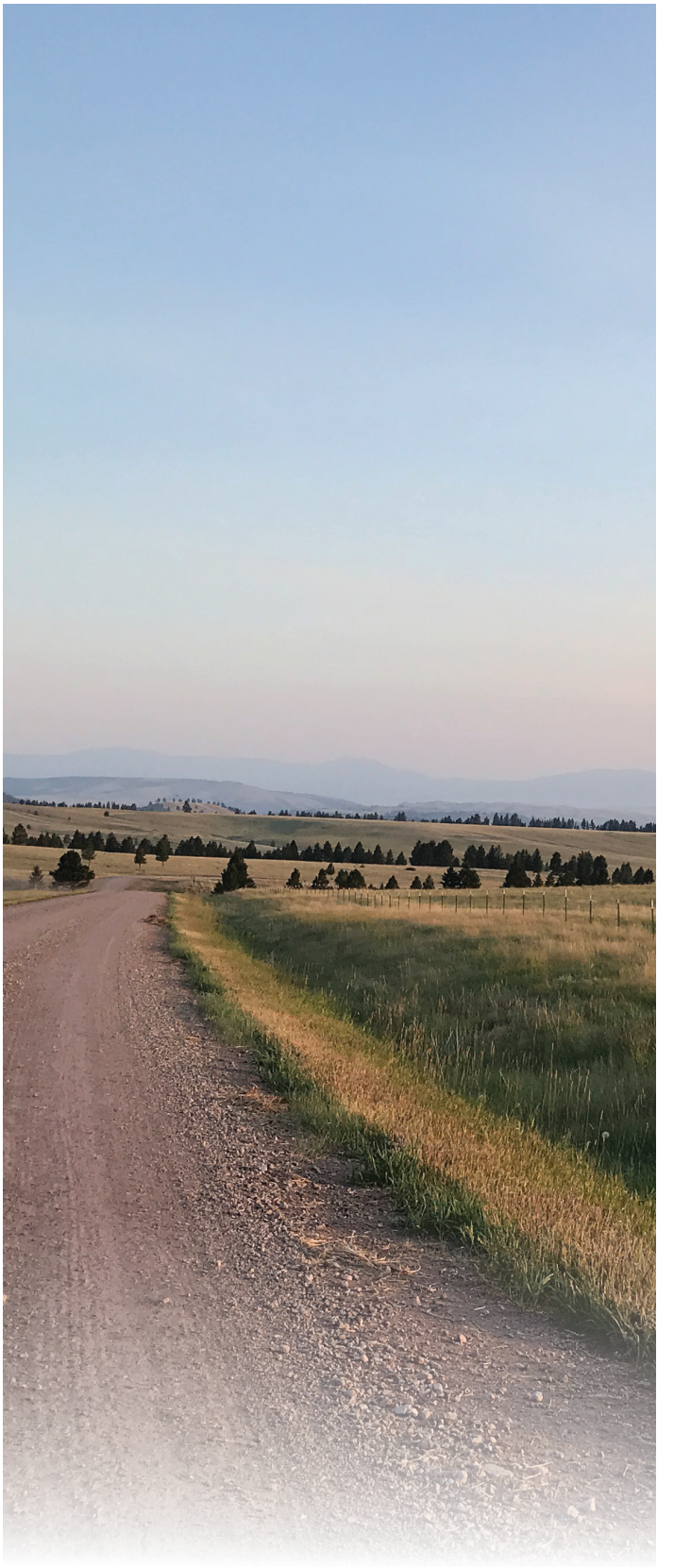
My community has adequate resources available for the mental health needs of children and youth.



TRANSPORTATION

My community has sufficient public transportation options available.





Stakeholder Interviews

When asked about community needs in White Sulphur Springs, one stakeholder stated,

"Our community is missing transportation and in home healthcare."

- Quote from Stakeholder



Community Forums

Monday October 7, 2019 - White Sulphur Springs Senior Citizen Center

Despite the successful senior center in town, community members feel there is a lack of communication about available services and upcoming events. The community feels that given the aging population, White Sulphur Springs is not adequately laid out or equipped to meet the needs of the growing senior population in the area. Seniors attending the forum also mentioned the lack of assisted living and absence of home health as an obstacle to aging in White Sulphur Springs. The lack of nurses and need for transportation for medical appointments also presented a challenge for this population.

Attendees of the community forum concurred that housing was a pressing need in their community. The housing crisis is felt acutely among retiring community members, said one attendee, as the limited income forces them out of their community. The housing that does exist is expensive and old and there is a lack of contractors to rehabilitate homes. Additionally, much of what housing is available is often taken up by seasonal workers and hunters.

In regards to mental health, several people mentioned the stigma associated with seeking help in rural Montana. Many community members agree that it has to be severe before the average resident of White Sulphur Springs will seek professional help. They mentioned several factors that contribute to poor mental health in the area; including addiction, grief, and the social isolation that comes with living in a small, rural community.

Supplemental Resources

The following appendix outlines the supplemental resources that were referenced in this needs assessment as well as other resources that further detail the top needs within HRDC's service district. Sources are categorized according to the top five community needs found in the Community Needs Assessment Survey, including housing, mental healthcare, childcare, healthcare, and transportation. Some sources provide information regarding multiple community needs and are listed under multiple categories.

Housing

Source	Source Summary
Sullivan, Wendy. Walker, Christine. (2018). *Big Sky Community Housing Assessment and Needs.* Retrieved from: http://bigskychamber.com/wp-content/uploads/2019/01/Big-Sky-FINAL-Housing-Assessment-Feb.-2018-f.pdf	This report identifies the amount, type, and price point of housing that is needed to support the local Big Sky workforce over the next five years. The report also identifies the available land, resources, and opportunities that could help provide affordable housing to Big Sky residents.
Trautman, Emily. (2019). *Bozeman Area Labor Report.* Retrieved from: http://lmi.mt.gov/Portals/193/Publications/LMI-Pubs/Special%20Reports%20and%20Studies/BozemanReport2019.pdf	This source gives an overview of population trends in Gallatin/Park County, employment data by industry, incomes/number of jobs by industry, labor force participation, and barriers to labor force participation. The three primary workforce barriers include: childcare, transportation, housing. The report also details how the availability of affordable homes may impact people's decisions to live and work in the Bozeman community.
Park County Community Foundation. *Housing and Affordability.* Retrieved from: https://insight.livestories.com/s/v2/housing-and-affordability/2406dc8a-3f22-4623-ab70-aa5caca54509	This source details the Park County Community Foundation's vision to support good solutions that address affordability for all who choose to live and work in Park County. It defines housing unit characteristics, cost-burdened housing, and the local real estate market.
Sullivan, Wendy. Walker, Christine. (2019). *Bozeman, Montana Community Housing Needs Assessment.* Retrieved from: https://www.bozeman.net/home/showdocument?id=8773	The source provides an in-depth description of the City of Bozeman's current housing needs and the underlying factors that are creating the need for more affordable housing, such as growth, wages, increasing rentals costs, and increasing home prices. It concludes that more housing and more diversity in housing is needed at prices that residents and employees can afford.
Gallatin City-County Health Department. (2018). *Community Health Needs Assessment.* Retrieved from: https://www.healthygallatin.org/wp-content/	This source details the health consequences that come with a lack of affordable housing in Gallatin County, including poor academic performance, an escalation in domestic violence, substance abuse, poor health, and homelessness.

The Bozeman Area Community Foundation. (2018). *A Seat at the Table: Conversation Summaries.* Retrieved from https://static1.squarespace.com/static/5b4f91da85ede11b91352d52/t/5cc9e9f42074b30001a3025c/1556736501812/Seat+at+the+Table+report+BRIEF.pdf	Over 100 tables and 900 community members participated in the Seat at the Table event in October 2018. Overwhelmingly, participants indicated that they love living in a beautiful location and value the plentiful recreational opportunities and open space in a friendly, safe community. In their open-ended responses, participants described conversations and ideas that focused primarily on the following topics (listed in order of prevalence in open-ended participant responses): growth, transportation, affordability, ideas to generate funding for community needs, spaces to build community, improved public services, and improved partnerships.
Human Resource Development Council of District IX. (2016). *Assessing the Costs of Chronic Homelessness in the Gallatin Valley.* Retrieved from https://mthcf.org/resources/report-assessing-the-costs-of-chronic-homelessness-in-the-gallatin-valley/	In recent years, changing housing markets have created increasing difficulties on local families seeking to secure permanent housing. The largest impacts of the regional population growth seem to be on the city's infrastructure, particularly housing affordability and availability. The overall residential vacancy rate is 1.5%, which is lower than both the statewide and nationwide rates. Extreme difficulty in finding available rental housing is reported across virtually all communities. This impacts local families, by making the transition from homelessness back into housing more challenging resulting in longer periods of homelessness. Consequently, the length of time required for Housing First case managers to support customers in achieving stable housing have also increased. This paired with more stringent income and rental restrictions from federal funding sources has widened the gap where families seeking assistance may fall through.
Doherty, Seana. Sullivan, Wendy. Walker, Christine. (2019). *Bozeman Community Housing Action Plan.* Retrieved from: https://www.bozeman.net/Home/ShowDocument?id=9443	This plan presents a set of actions that address a range of community housing needs. The 2019 City of Bozeman Community Housing Needs Assessment study showed that between 5,400 to 6,340 housing units are needed over the next five years to address the current housing shortfall for residents and the workforce and to keep up with job growth. About 60% of these units need to be priced below-market to meet the full range of community housing needs. This includes a mix of housing unit types to diversify options for residents, with prices ranging primarily between $160,000 and $400,000 for ownership and $500 to $1,200 per month for rent. This plan was developed to begin addressing identified community housing needs and to create a lasting framework for implementation that will evolve as the community and its housing needs continue to evolve. The partnership framework for accelerating community housing in Bozeman is based on the recognition that no one entity can solve the local housing challenges – it takes a community to build a community.
Big Sky Resort Area District. (2019). Big Sky Visioning Board. Retrieved from: https://docs.google.com/document/d/1yejgMwI8KwjY4yeRC8SWqqlgrCJxvGC2l5CAzahyMjg/edit	One strategy discussed in this source is to create more affordable housing. This was found as a critical need in the Big Sky community.

National Low Income Housing Coalition. (2019) *Out of Reach Report* Retrieved from: https://reports.nlihc.org/oor/montana	This report documents the significant gap between renters' wages and the cost of rental housing across the United States. Commonly used, the Housing Wage, is an estimate of the hourly wage a full-time worker must earn to afford a modest rental home at HUD's fair market rent (FMR) without spending more than 30% of his or her income on housing costs, the accepted standard of affordability. The FMR is an estimate of what a family moving today can expect to pay for a modestly priced rental home in a given area.
National Council of Aging. (2019) *Elder Index* Retrieved from: https://elderindex.org/	Measures the income that older citizens need to live independently.
Sullivan, Wendy. Walker, Christine. *Big Sky Community Housing Action Plan*. (2018) Retrieved from: https://thehrdc.org/wp-content/uploads/2018/06/Big-Sky-Community-Housing-Action-Plan-f-1.pdf	The Big Sky Housing Action Plan is the culmination of a year-long needs assessment and action planning effort lead by the community and funded by the Resort Tax Board to create a long-term plan to address the housing issues facing Big Sky. It will serve as a road map for the Big Sky community to create housing opportunities for the individuals and families working in Big Sky.
Chen, Natasha. KIRO 7 News. *Study: Rent Increases Linked to Homelessness* Retrieved from: https://www.kiro7.com/news/rent-increases-linked-homelessness/28697248/	Article talking about the correlation between rising house and rental costs and homelessness.
Prospera Business Network. 2020 Economic Profile Gallatin and Park Counties, Montana Retrieved from: https://dashboards.mysidewalk.com/201-economic-profile-gallatin-and-park-counties-montana-daf6e45ee26f/park-county-738c9f793bf9	Economic profile highlights two counties in HRDC's service area - Gallatin, Park and Meagher county

Mental Healthcare

Source	Source Summary
Park County Health Department. (2018). *Park County Community Health Improvement Plan.* Retrieved from: https://mthcf.org/wp-content/uploads/2017/04/Park-County-CHIP.pdf	This plan was created by the Park County Health Department as they partnered with Livingston HealthCare, LiveWell49, Community Health Partners, the Livingston Public Schools, and Greater Gallatin United Way. The document is a long-term planning effort that outlines strategies to address key health concerns in the Park County community and improve the overall health of its population. The plan identifies priority areas in the categories of behavioral health, youth, growth/housing/economic development, and access to

	care.
Gallatin City-County Health Department. (2018). *Community Health Needs Assessment.* Retrieved from: https://www.healthygallatin.org/wp-content/uploads/2018/12/2018GallatinCountyCommunityHealthAssessment_Digital.pdf	The focus groups that participated in this study identified the mental health system and substance abuse as major causes of concern. Some of the specific problems mentioned include: lack of access to affordable mental health and substance abuse services, a system that struggles to keep up with the demand of serving those in crisis, funding cuts that have decimated core case management services for those with serious and persistent mental health conditions, and a persistent stigma associated with even basic mental health care.
Roston, Karl. (2018). *Suicide in Montana.* Retrieved from: https://dphhs.mt.gov/Portals/85/suicideprevention/SuicideinMontana.pdf	This source lists suicide facts at a nationwide level and in Montana specifically. It also details the reasons why Montana has a high rate of suicide.
Mountainview Medical Center, *Community Health Services Development Community Health Needs Assessment Report* Retrieved from: https://mthcf.org/wp-content/uploads/2018/01/Meagher-County-CHNA.pdf	This source is the Meagher County health assessment report.In the winter of 2016, Mountainview Medical Center's service area was surveyed about its healthcare system. This report shows the results of the survey in both narrative and chart formats. A copy of the survey instrument is included at the end of this report (Appendix D). Readers are invited to familiarize themselves with the survey instrument and the subsequent findings. The narrative report touches on the highlights while the charts present data for virtually every question asked.
Department of Public Health and Human Services. (2019). *Suicide Prevention Strategic Plan* Retrieved from: https://dphhs.mt.gov/Portals/85/suicideprevention/StateSuicidePlan2019.pdf	Montana has many partners already working in the area of suicide prevention. The following goals, objectives and strategies are designed to strengthen the work that is already occurring and support a statewide, coordinated and evidence-based approaches to reducing suicide in our state.

Childcare

Source	**Source Summary**
Trautman, Emily. (2019). *Bozeman Area Labor Report.* Retrieved from: http://lmi.mt.gov/Portals/193/Publications/LMI-Pubs/Special%20Reports%20and%20Studies/BozemanReport2019.pdf	This source gives an overview of population trends in Gallatin/Park County, employment data by industry, incomes/number of jobs by industry, labor force participation, and barriers to labor force participation. The three primary workforce barriers include: childcare, transportation, housing. The report also details how the availability of affordable homes may impact people's decisions to live and work in the Bozeman community.
Grunewald, Rob. Tegan, Lane. (2018). *Early Childhood Development in Montana.* Retrieved from https://www.greatergallatinunitedway.org/sites/gr	In Montana, less than 50 percent of 4-year-old low-income children and less than 10 percent of low-income children under age 3 have access to high-quality early learning programs. In addition to supporting child development when children are cared for outside the

eatergallatinunitedway.org/files/early-childhood-development-in-montana-2018.pdf	home, the ability to access high-quality child care can help parents enter the workforce and be productive at their jobs.
Bozeman Daily Chronicle (2019). *Report Highlights Childcare, tight job market as challenges in Bozeman area* Retrieved from: https://www.bozemandailychronicle.com/news/business/report-highlights-childcare-tight-job-market-as-challenges-in-bozeman/article_836f4971-8dfb-53cb-a8ec-7eb312797a97.html	Article published in the Bozeman Daily Chronicle speaking to the Bozeman Labor Report and spelling out how there is a direct correlation between lack of childcare and the tight job market.
Childcare Connections. *Handouts (Meagher, Park, Gallatin)* Retrieved from: http://bozemanccc.org	Handouts that highlight the childcare gaps throughout Gallatin, Park, and Meagher counties. These handouts describe gaps in access to childcare and the ramifications lack of childcare has on the family.
Rich, Kathy. (2018). DPHHS. Montana Headstart Collaboration Office. *Montana Head Start Collaboration Office Needs Assessment Summary* Retrieved from: https://dphhs.mt.gov/Portals/85/hcsd/documents/ChildCare/HSCO/2018HSCONeedsAssessmentSummaryFinal.pdf	The goal of this source is to assess how Head Start and Early Head Start programs collectively respond to the various priority areas, as listed by the Office of Head Start.

Healthcare

Source	Source Summary
Bozeman Health. (2017). *2017 Community Health Needs Assessment Report.* Retrived from https://www.bozemanhealth.org/media/1432/2017_prc_chna_report_bhdh.pdf	The report identifies multiple “areas of opportunity” that represent the significant health needs of the community, based on the information gathered through this Community Health Needs Assessment and the guidelines set forth in Healthy People 2020. The “areas of opportunity include: access to healthcare services, cancer, dementia, diabetes, heart disease and stroke, injury and violence, mental health, physical activity and nutrition, potentially disabling conditions, respiratory diseases, substance abuse, and tobacco use.
Gallatin City-County Health Department. (2018). *Community Health Needs Assessment.* Retrieved from: https://www.healthygallatin.org/wp-content/uploads/2018/12/2018GallatinCountyCommunityHealthAssessment_Digital.pdf	This report identifies the prevalence of chronic diseases in Montana. It states that chronic disease accounts for 8 of the 10 leading causes of death in Montana, including heart disease, cancer, cerebrovascular disease, and diabetes among others. Where county level data was available in the report, age-adjusted death rates in Gallatin County were lower than state rates; however, the causes of death rankings were similar.

Sara R. Collins. David C. Radley. Jesse C. Baumgartner. (2019). *Trends in Employer Health Care Coverage, 2008-2018: Higher Cost for Workers and Their Families* Retrieved from: https://www.commonwealthfund.org/publications/2019/nov/trends-employer-health-care-coverage-2008-2018	Article diving into employers offered healthcare.
Loveridge, Melissa (2019). *Report: Health care costs grew faster than income in Montana, nation over past decade.* Retrieved from https://www.bozemandailychronicle.com/news/report-health-care-costs-grew-faster-than-income-in-montana/article_8f5904a2-8c37-5d96-ab98-4585f388213b.html	Article analyzing the growing cost of healthcare and insurance in Montana that is not in line with local wages.
Dennison, Mike. (2019) *Montana Hospital Prices Among Highest In National Study* Retrieved From www.missoulacurrent.com/business/2019/08/montana-hospital-prices/	Article that analyzes how Montana has some of the highest health costs in the country, making visiting the hospital extremely costly for some.
Chelvakumar, Gayathri. Ford, Nancy. Kapa, Hillary M. Lange, Hannah L H. McRee, Annie-Laurie. Bonny, Bonny, Andrea E. (2017) *Healthcare Barriers and Utilization Among Adolescents and Young Adults Accessing Services for Homeless and Runaway Youth* Retrieved from: https://pubmed.ncbi.nlm.nih.gov/27817043/	Detailed publication found on National Institute of Health website. This publication highlights how runaway youth and youth facing homeless ness are at an increasingly higher likelihood of negative health outcomes.
Ghafari, Mahin. Shamsuddin, Khadija. (2014) Barriers to Utilization of Health Services: Perception of Postsecondary School Malaysian Urban Youth Retrieved from: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4124555/	Publication detailing the lack of accessibility of healthcare to young adults.

Transportation

Source	**Source Summary**
Trautman, Emily. (2019). *Bozeman Area Labor Report.*	This source gives an overview of population trends in Gallatin/Park County, employment data by industry, incomes/number of jobs by industry, labor force participation, and barriers to labor force

Retrieved from http://lmi.mt.gov/Portals/193/Publications/LMI-Pubs/Special%20Reports%20and%20Studies/BozemanReport2019.pdf	participation. The three primary workforce barriers include: childcare, transportation, housing.
The Bozeman Area Community Foundation. (Fall 2018). *A Seat at the Table: Conversation Summaries.* Retrieved from https://static1.squarespace.com/static/5b4f91da85ede11b91352d52/t/5cc9e9f42074b30001a3025c/1556736501812/Seat+at+the+Table+report+BRIEF.pdf	Over 100 tables and 900 community members participated in the Seat at the Table event in October 2018. Overwhelmingly, participants indicated that they love living in a beautiful location and value the plentiful recreational opportunities and open space in a friendly, safe community. In their open-ended responses, participants described conversations and ideas that focused primarily on the following topics (listed in order of prevalence in open-ended participant responses): growth, transportation, affordability, ideas to generate funding for community needs, spaces to build community, improved public services, and improved partnerships.

Other

Source
Hamilton, Emma. (2019) *More than Half of Bozeman Residents have college degrees* Retrieved from: https://www.kbzk.com/news/local-news/2019/03/06/more-than-half-of-bozeman-residents-have-college-degrees/
Montana Food Bank Network. (2020) Retrieved from: https://mfbn.org/
Feeding America. (2020). *Hunger In Montana* Retrieved from: https://www.feedingamerica.org/hunger-in-america/montana
Park County Community Foundation. (2020). *We will Park County* Retrieved from: https://www.pccf-montana.org/programs-and-impact/we-will-park-county.html
Data USA Retrieved from: datausa.io
US Census Bureau. (2020). *American Community Survey (ACS)* Retrieved from: https://www.census.gov/programs-surveys/acs
Community Commons. (2020) Retrieved from: https://www.communitycommons.org/