

Planning Area Profile

Missoula Area Mapping Project

Looking Forward, Growing Together

Missoula County Community and Planning Services

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Acknowledgments

Board of County Commissioners

Jean Curtiss
Nicole “Cola” Rowley
David Strohmaier

Land Use Technical Committee

Collin Bangs, Retired Realtor®
Deborah Bell, AICP, Public Works, Missoula County
Adriane Beck, Office of Emergency Management, Missoula County
Mike Boehme, Bonner Property Development, LLC.
James Grunke, Missoula Economic Partnership
Mike Haynes, Development Services, City of Missoula
Jennifer Hensiek, Missoula District Ranger, U.S. Forest Service
Alice Jones, Five Valleys Land Trust
Nick Kaufman, WGM Group
Karen Knudsen, Clark Fork Coalition
Laval Means, Development Services, City of Missoula
Jessica Morriss, Missoula Metropolitan Planning Organization
Steve Nelson, Bonner Property Development, LLC.
John Newman, Missoula Consolidated Planning Board
Kenneth Parks, Disaster and Emergency Services, Missoula County
Eran Pehan, Office of Housing and Community Development, City of Missoula
Nicole Rush, Missoula Economic Partnership
Amber Sherrill, Five Valleys Land Trust
Sam Sill, Missoula Organization of Realtors®
Shannon Therriault, Environmental Health Division, Missoula City-County Health Department
Nicole Whyte, Public Works, Missoula County
Aaron Wilson, Missoula Metropolitan Planning Organization
Jean Zosel, Garden City Harvest

Missoula County Community and Planning Services Staff

Patrick O’Herren, Chief Planning Officer
Karen Hughes, AICP, Assistant Director
Christine Dascenzo, AICP, Planner II
Andrew Hagemeyer, AICP, Planner III
Laurie Hire, Office Manager
Heather Peters, Administrative Assistant
Andrew Stickney, Senior GIS Specialist
Kate Washington, Planner II

Consulting Partner

Strategies 360





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Chapter One: Introduction



“The most important thing to know about the Planning Area Profile is that it is just one tool that will be used to inform the land use map update”

PROJECT SETTING

At current rates, Missoula County is growing by about 1,200 people per year. To put that in perspective, there are seven counties in Montana where the entire county population is fewer than 1,200 people. Of those new Missoula County residents, 80% will reside in either the City of Missoula or within the county around the City’s fringe. This area of concentrated growth will need at least 400 new homes per year. New homes need roads, sewer and water lines and internet service. New people need jobs, schools, food to eat, water to drink, places to shop and maybe even a park to walk their dog. Yes, there will be more dogs.

People are coming here because Missoula is a great place to live. The list of accolades and best place rankings from magazines and blogs for our outdoor amenities and desirable lifestyle continues to grow. From the mountain peaks to the river bottoms, the quality of life derived from both natural and cultural resources is rich, deep and part of Missoula’s identity.

In addition to great people and impressive amenities, Missoula is a community with a complex web of roads, utilities, communication networks, homes and businesses. Land use planning for the community is the responsibility of two jurisdictions; Missoula County and the City of Missoula. Those jurisdictional lines aren’t always visible on the landscape; one has to reference maps and legal descriptions to discern between the two.

Planning for Missoula’s growth and development is no simple task. The majority of Missoula County cannot be developed because the mountains, rivers, lakes and public lands that contribute to our sense of place also limit where we can grow. In Missoula, the geography pushes development down certain paths and everywhere you look some thing or some value is already present. It could be a dense subdivision or a farmer’s field; wildlife habitat or a pristine view. No landscape is truly empty; land in all its forms has value.

The Missoula County Land Use Map Update will represent Missoula’s needs and values as a community. The goal is to support the growth and development of Missoula for the benefit of all its residents and businesses, not just those in the city and not just those in the county. Through this process, the community as a whole is considered in an attempt to decide how the county can best play a role in planning for Missoula’s land use needs. Updating the land use map is like putting together a puzzle. All the pieces that make up the Missoula community are on the table. They represent our needs: housing, jobs, transportation, food, services and more.

They represent our values: access to nature, open space, agriculture, recreation, views and more. The task is to fit the pieces together and make a picture that represents the future of our community.

The core purpose of the Planning Area Profile is to inform the process of updating the Missoula County Land Use Map in areas of the County surrounding the City of Missoula. It is one tool among many that will inform the process. Public input will be a major tool, along with other studies, plans and resources. Among the tools, the Planning Area Profile is unique in that it focuses specifically on how much growth we expect and how the growth relates to commercial, industrial and residential land use. As growth occurs, these land uses will be the primary driver of change to the developed landscape in the Planning Area. Understanding what changes to commercial, industrial and residential land use we can expect will be useful when the broader discussion on how growth relates to our community values begins.

PROJECT DESCRIPTION

Background

Following an extensive public outreach and participation process, the Board of County Commissioners adopted the Missoula County Growth Policy in June of 2016. ‘Growth Policy’ is the term used in Montana state law [76-1-601, Montana Code Annotated] for a comprehensive plan or master plan. In Missoula County, the Growth Policy is a vision for how to provide vibrant places for people to live, work and play while protecting the assets that residents value most. Functionally, a growth policy is a guidance document that provides the county with the legal framework and philosophical foundation upon which to base future plans and regulations.

An important element of the Missoula County Growth Policy is the Missoula County Land Use Designation Map. A land use designation map is a spatial and visual representation of a community’s policy and values. It is a blueprint for how a community evolves, guiding development of public infrastructure, planning for delivery of local services and providing the foundation for regulations such as zoning.

The existing land use map was originally drafted in 1975. Since then, much of the map has been updated by area plans and comprehensive plan updates, with adoption of the most recent changes in 2011. There has never been a countywide comprehensive update to the land use map. When

Missoula County adopted the updated Growth Policy in 2016, it did not update the land use map. Rather, the Growth Policy identified updating the map as a high priority for implementation. It is considered an especially high priority for those areas experiencing growth and development pressures, where the existing designations are outdated and/or where there is significant community interest. The 2016 Growth Policy includes reference to a specific action plan for updating the map, called the Land Use Strategy.

The Land Use Strategy

The Land Use Strategy is the implementation plan for updating the Missoula County Land Use Designation Map found at the end of Chapter Two of the Missoula County Growth Policy. The strategy includes these five steps:

1. Establish a land use designation framework for the county that reduces the overall number of land use designations from what currently exists.
2. Establish guidelines for community-based land use mapping, such as data sets to be used, community involvement expectations, time line, roles/responsibilities for participating communities and Community and Planning Services (CAPS), etc.
3. Establish criteria to evaluate the priority of areas to be updated. Criteria should address, at a minimum: time since the last update of land use designations in the area; type and urgency of growth pressures; and community interest and readiness.
4. Identify order of priority for updating land use designations in specific communities and areas of Missoula County.
5. Update land use designations at the community level, utilizing community involvement, based on order of priority and report progress annually to BCC and Planning Board.

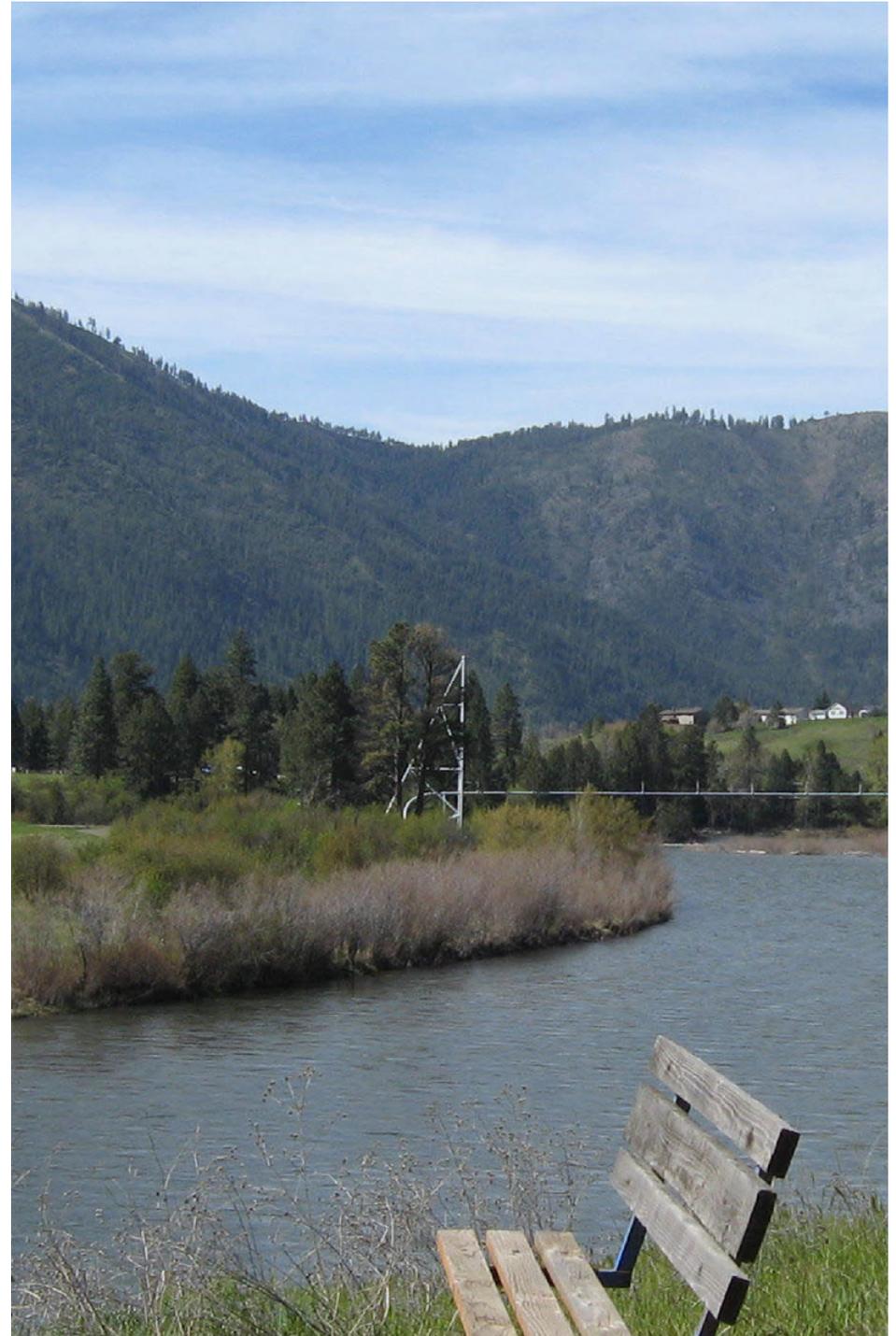
Following the adoption of the Growth Policy, CAPS thoroughly evaluated these five action steps. The current course of action is to divide the map update into at least two phases. The first phase will focus on the urban edge around Missoula. The second phase will focus on the more rural areas of Missoula County. For these rural areas, the five action steps will be re-evaluated to determine staff priorities for implementing the land use strategy.

THE PLANNING AREA

Why Update the Missoula Urban Area First?

The Growth Policy states that updating the land use designation map is an especially high priority for those areas experiencing growth and development pressures, where the existing designations are outdated and/or where there is significant community interest. The urban area around Missoula was identified as the first priority for a map update for the following reasons:

- The Missoula urban area experiences the most growth pressure in Missoula County. Eight out of ten new residents to Missoula County will locate within the urban area
- The unincorporated area around the City of Missoula is home to over 23,000 people and has the most complex land use patterns in the county with varying levels of infrastructure, density and employment
- This area has a long demonstrated history of planning, but most of the Area Plans establishing land use designations were adopted more than 20 years ago
- This area has a regional impact on the housing market
- The limited land area, growth pressures and competing values have increased public interest in land use planning in the area



Planning Area

The methodology for identifying the Planning Area (Figure 1) for Phase 1 of the map update employs the following considerations:

1. Incorporate existing Urban Area Plan boundaries identified in Map 6 of the Missoula County Growth Policy (Figure 2)
2. Incorporate zoning districts adopted and administered by Missoula County according to 76-2-201 MCA, commonly referred to as Part II zoning (Figure 2)
3. Capture areas of the county where the majority of growth is currently occurring and where it is expected to occur within the next 20 years
4. Community Council Boundaries

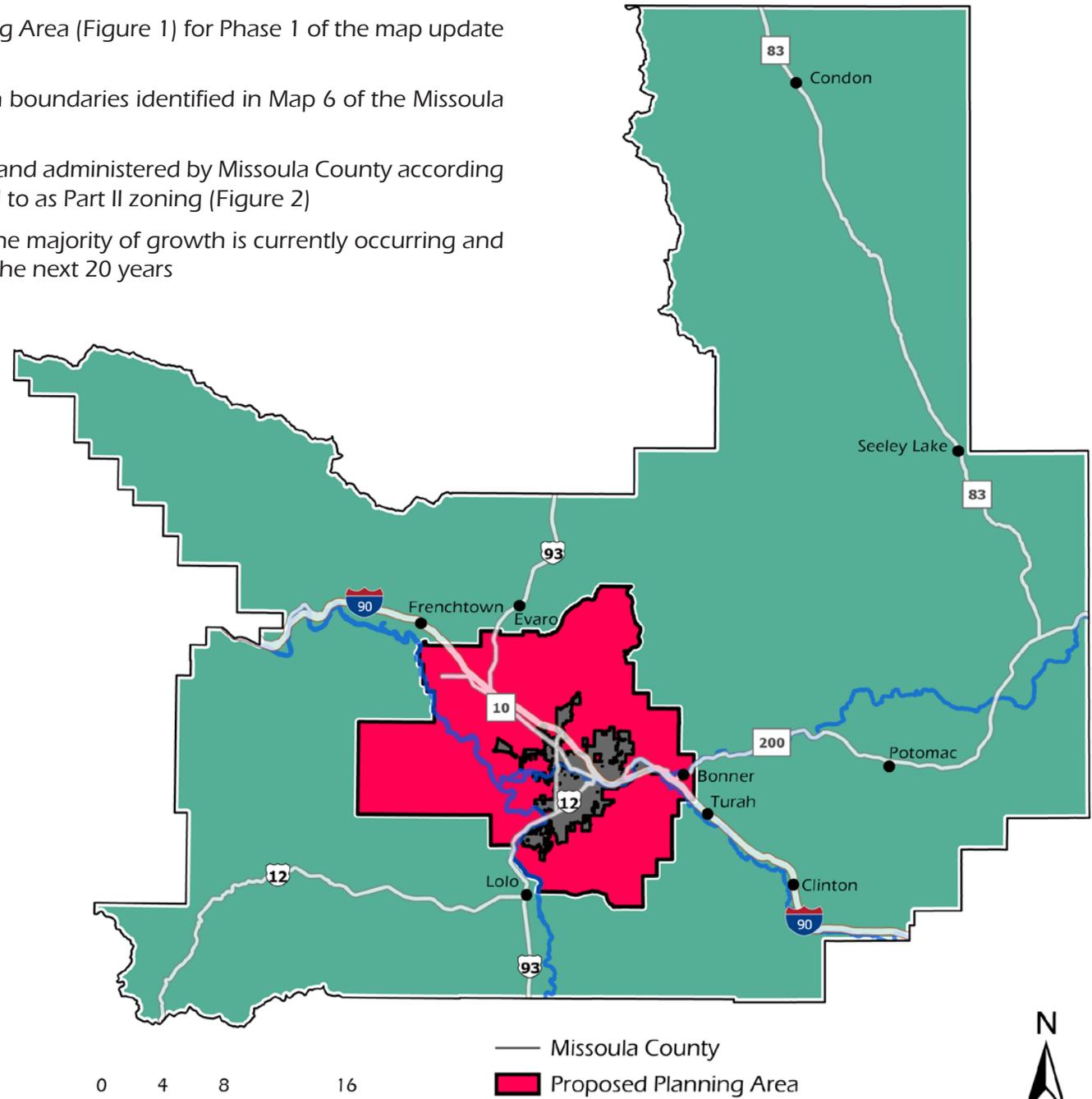


Figure 1: Location of the Planning Area in Reference to Missoula County

Consideration 1: Urban Area Plan Boundaries

The Missoula Urban Area Plans, as identified in Map of the Missoula County Growth Policy, form the foundation of Missoula County's planning approach to growth management in the unincorporated areas of Missoula County. Most of the plans are over 20 years old.

Consideration 2: Part II Zoning Districts Boundaries

In 1976, Missoula County adopted zoning in some areas around the City of Missoula as part of the implementation of the 1975 Missoula County Comprehensive Plan. Similar to the Land Use Designation Map, the zoning regulations and zoning map have not had a comprehensive update since being adopted in 1976. Missoula County is currently in early phases of a multi-year update to the county zoning regulations. Updated land use designations will provide the legal framework and planning foundation for phases of the county zoning update.

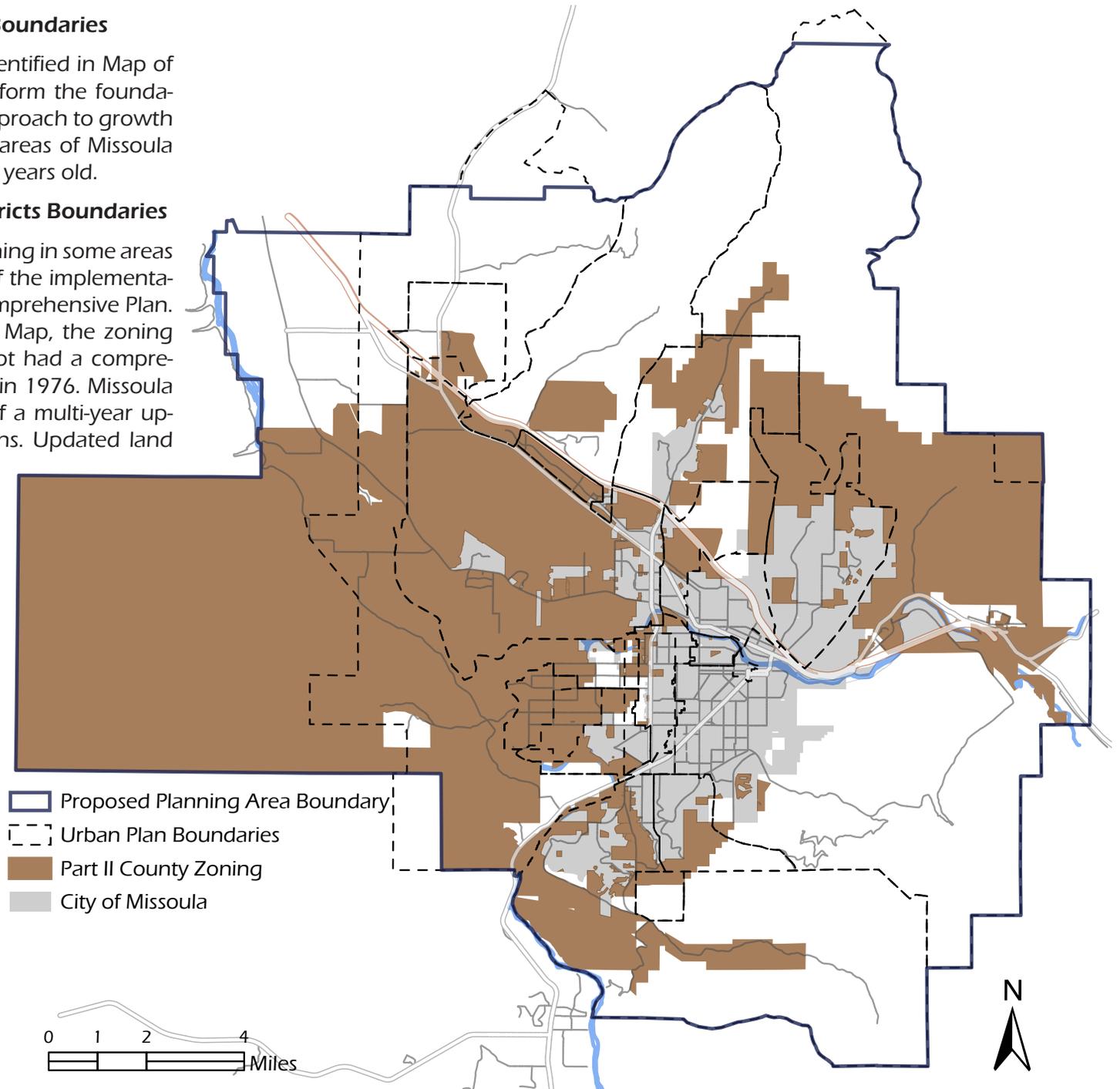


Figure 2: Area Plans and Part II Zoning Considerations

Consideration 3: County Growth Areas: Now and in the Next 20 Years

The majority of new development in Missoula County is occurring within the boundaries of the Missoula urban area plans. In general, development is occurring along major transportation routes between the Wye and Bonner. The area west of Missoula is most likely to see development over the next 20 years. Areas especially of interest are the Wye, Mullan Road and the former Smurfit-Stone site.

Consideration 4: Community Council Boundaries

Small portions of the Seeley Lake, Lolo and Evaro Community Council boundaries overlap the existing urban area plans identified in Figure 2. Based on Consideration 1, they would be included in the Planning Area, but because the areas that overlap are mostly federal lands and not expected to see significant development pressure, they are not being considered in this phase of the map update.

HOW TO USE THE PLANNING AREA PROFILE

The Planning Area Profile is a tool to inform the process of updating the land use map for the unincorporated areas surrounding the City of Missoula. Think of it as a review and summary of existing census data, plans, policies, trends and projections that influence development. The Planning Area Profile does not cover every data point or review every study; rather it identifies specifics related to land use and points the public and policy makers toward additional information.

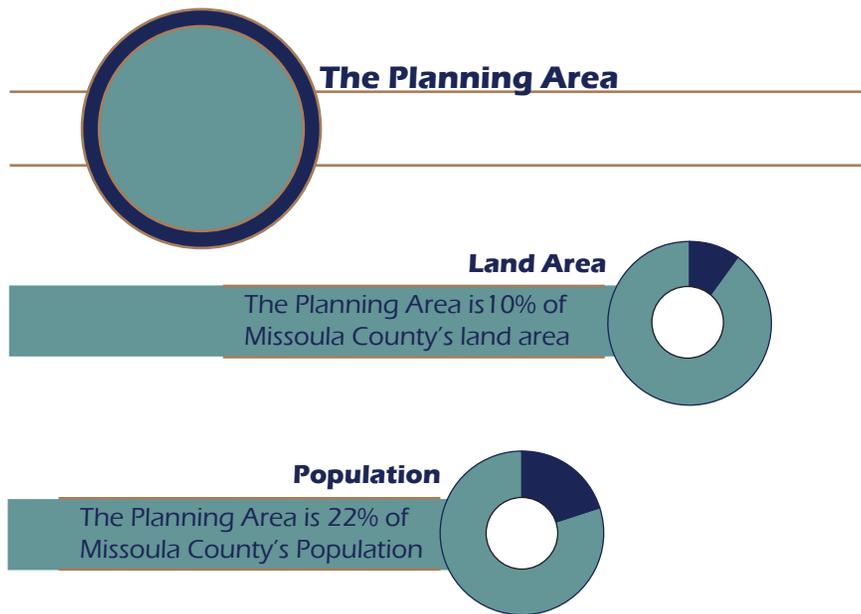
The Planning Area Profile focuses specifically on how much growth we might expect and how the growth relates to commercial, industrial and residential land use. As growth occurs, these land uses will be the primary driver of change of our developed landscape.

The most important thing to know about the Planning Area Profile is that it is just one tool that will be used to inform the land use map update. There are many more plans, studies, reports and data that will be useful but our best resource is the community itself. Public participation is key. Through a series of outreach opportunities, the community will review this report and weigh in on how they think the Planning Area will grow. The Planning Area Profile will be revised and then the process of drawing up maps can begin.

Planning Area Profile Flow



Chapter Two: Where We Are Now¹



109,299 people live in Missoula County²



¹ All data in this chapter comes from the 2000 and 2010 U.S. Decennial Census unless otherwise noted.

² This figure is from the 2010 US Census, the last complete count of the county's population. The latest US Census estimated population of Missoula County is from 2016 and is 116,130.

THE PEOPLE

The Planning Area, which does not include land within the city limits, comprises just 10% of Missoula County's land area, but contains 22% of Missoula County's population. As of the 2010 census, Missoula County's population was 109,299; 66,788 lived in the City of Missoula and 42,511 people lived in the county outside the city limits. Of the county population, 23,683 people lived within the Planning Area. This is more than the population of Kalispell, Montana's 7th largest city.

The Planning Area is not one cohesive community. It is made up of a combination of suburban and rural neighborhoods and communities with their own diverse identities. East Missoula, Bonner, West Riverside and Milltown have long histories as blue-collar timber towns. Orchard Homes and Target Range are steeped in agricultural heritage. The Wye is an important transportation hub and its development is relatively recent. Each community has different perspectives on land use, values and needs.

The breadth of the Planning Area makes it difficult to paint an accurate picture of the demographic characteristics. The U.S. Census breaks the county into different divisions for the tabulation of data and they do not align with the Planning Area boundary. However, there are four census-designated places (CDP) within the Planning Area that provide relevant information. This profile uses the data from these CDPs to create a picture of the Planning Area's demographic characteristics, which will be useful in the land use map update. Data from the 2012-2016 American Community Survey is used to provide more recent estimated data for larger reference areas like Missoula County and the City of Missoula.

As the Population Ages and Household Size Shrinks, More Homes Are Needed For the Same Number of People

Household size is the total number of people living in a housing unit and is a useful statistic for determining the number of units needed to accommodate a population. Household size in Missoula County decreased from 2.4 people per household in 2000 to 2.3 people per household in 2010. Even if there was not an increase in population, more homes are needed when fewer people live together. All of the four CDPs have more people per household than Missoula County as a whole, but all of the CDPs' average household size is in decline (Table 1).

It is likely that an aging population is one factor driving down household size. Overall, the Planning Area population is older than Missoula County and is likely to remain that way (Table 2). An aging population is

consistent throughout the Planning Area, except in East Missoula where the population is actually trending younger. Young people appear to be choosing to live within the city limits and East Missoula rather than in the fringes of Missoula, perhaps due to housing type and housing preference.

An aging population will have impacts on land use in a number of ways. AARP found 80% of people 40 and older want to remain in their communities¹. To facilitate aging in place, land use map updates will need to consider location for housing with access to public transportation, nearby stores and entertainment, walkable infrastructure and a variety of housing options.

The Disparity between Income Levels and Housing Costs Are Driving a Need for More Housing Choices

Both the City of Missoula and Missoula County’s median household income and per capita income are less than the State of Montana’s. What is most noticeable is that while the median household income in Missoula County and the City of Missoula increased between 2000 and 2010, the increase is less than that for the State of Montana (Table 3). Income levels in the Planning Area vary, with the lowest found in Bonner-Milltown and the highest in Orchard Homes. In Missoula County overall, housing affordability is affected by lower-than-state-average median incomes and higher-than-state-average median home prices.

With home prices rising faster than wages, affordability is an increasingly important issue. Land use map updates will need to incorporate strategies that address housing costs, type and location.

As Population Increases, the Number of Jobs Will Also Increase

The rate of population growth in Missoula County appears to be correlated to economic conditions. Over the past 70 years, Missoula County has seen strong population growth, except for the 1980s, when many timber jobs were lost, and for the 2000s, during the Great Recession. During these times, Missoula County’s population growth rate slowed. This trend indicates that under normal economic conditions, faster population growth is expected.

New people in the Planning Area mean new jobs in the Planning Area. With job growth, the right mix of land uses need to be available to support those employment sectors. Missoula County has followed some of the national employment trends, but not others. Some sectors such as wholesale trade and information have increased in Missoula County while decreas-

Table 1: Household Size

Location	Household Size in 2010	Percent Change from 2000
Montana	2.35	-4.26%
Missoula County	2.3	-4.35%
City of Missoula	2.18	-2.29%
Bonner/West Riverside	2.33	-5.15%
East Missoula	2.35	-6.38%
Orchard Homes	2.42	-5.37%
Wye	2.93	-5.80%

Table 2: Median Age

Location	Median Age in 2010	Percent Change from 2000
Montana	39.8	5.78%
Missoula County	34.3	3.21%
City of Missoula	30.9	1.94%
Bonner/West Riverside	35	8.00%
East Missoula	34.9	-3.15%
Orchard Homes	43.4	8.99%
Wye	33	6.67%

Table 3: Household Income

Location	Median Income in 2010	Change from 2000
Montana	\$43,872	\$10,848.00
Missoula County	\$34,454	\$8,433.00
City of Missoula	\$30,366	\$6,181.00

ing nationally. The land use map will need to allow for a range and variety of employment sectors.

One side effect of rising housing costs is an increase in the cost of living in Missoula. Wages spurred by new job growth may not keep pace with the cost of living, which may act as a barrier to employers and job seekers. Missoula now has a higher median home price than the State of Montana and a lower median income. For businesses looking to hire new employees, the cost of living may make it difficult for them to find qualified candidates. As the land use map is updated, it is important to note that housing affordability is not only an equity issue, but it also impacts economic growth.



THE PLACE

Our Surroundings Play a Major Role in Where Growth Can Go

Some of the things that make Missoula a great place to live, like the mountains, rivers and open spaces, also limit where growth can take place. When planning for future development, constraints have to be recognized. Regulations that protect public health and safety can prevent or limit development in certain areas. Specific features that are constrained due to regulations include the regulatory floodplain (100-year and 500-year floodways), slopes steeper than 25% and wetland areas. Land ownership also acts as a constraint to development, in that federal, state and local government lands and private conservation easements limit or prevent development (Figure 3).

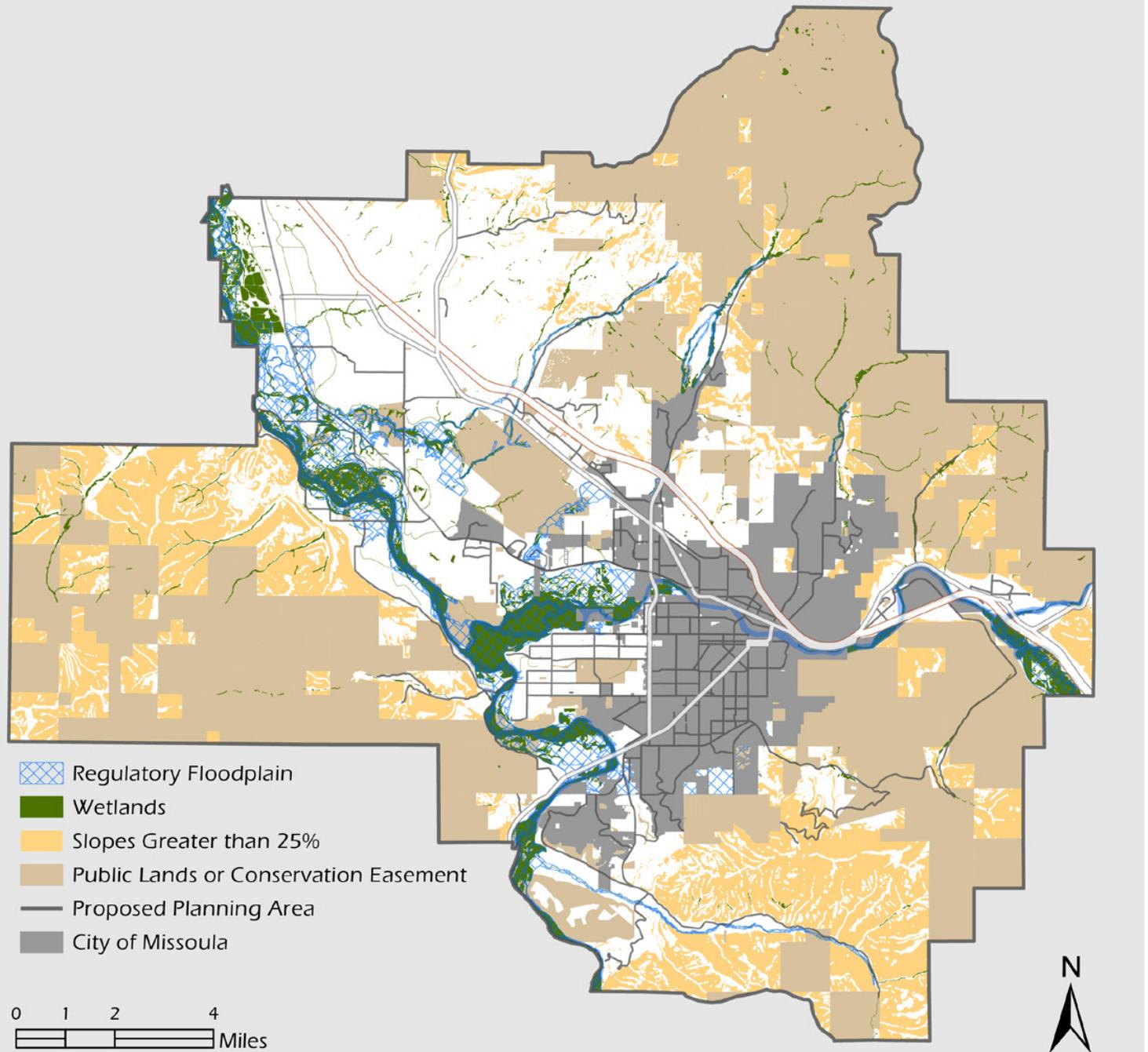


Figure 3: Areas with Potential Development Constraints

Wildfire Risk

Wildfire risk is a measure of both the probability and consequences of future wildfire events. The wildfire risk depends on the likelihood of a fire occurring there, the potential intensity of the fire, and the susceptibility or vulnerability of something of value at that location (e.g., houses, infrastructure, or watersheds).

By understanding the components of risk, Missoula County can work with partners to take steps to mitigate the risk to communities, including guiding future growth away from areas of higher risk through land use mapping.

Risk assessments delineate risk into categories (e.g., low, moderate, and high). It is important to keep in mind that low or moderate risk does not mean that there is no risk. Wildfires of consequence can occur in low risk areas.

The four hazard classifications shown here are a relative distribution for Missoula County (Figure 4). When mapped on a national scale for burn probability, most of the county is in the moderate to high range. The average of annual burn probability for the county is quite high compared to many other areas of the US. See the Missoula County Community Wildfire Protection Plan for more details.

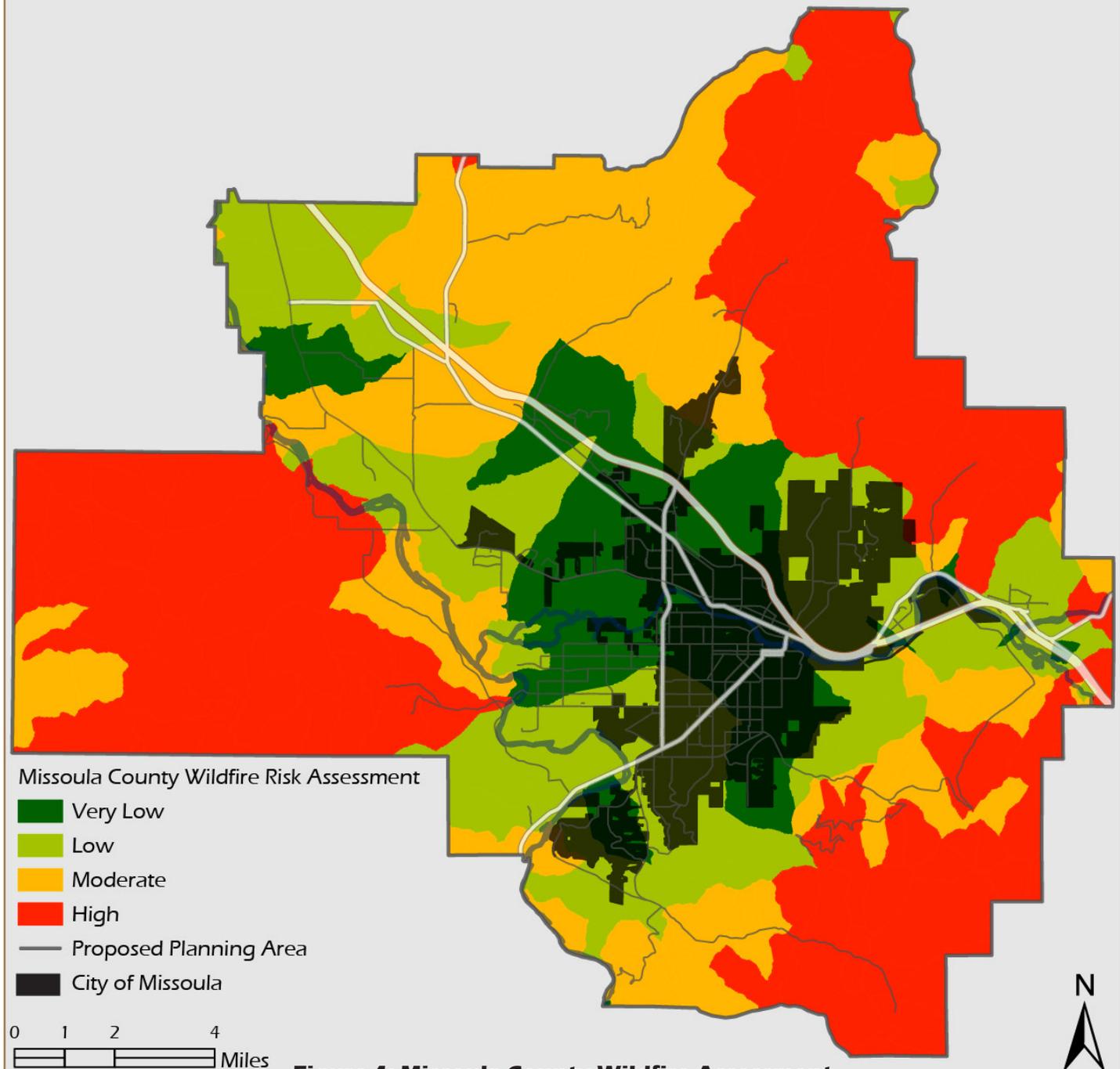


Figure 4: Missoula County Wildfire Assessment

Infrastructure and Services Shape Growth

Infrastructure is one of the key considerations when planning where and how much growth occurs in a given area. Rural areas with low levels of development do not require much infrastructure, while urban areas with high levels of development require high levels of infrastructure. The Planning Area has a wide range of infrastructure types and levels of service to consider.

Water and Wastewater

Of all the infrastructure and services that facilitate development, water and sewer have the greatest influence on density (Figure 5). Independent of local zoning, the Montana Department of Environmental Quality (DEQ) sets standards for water and wastewater treatment that generally determine the lot size. The Missoula City-County Health Department administers DEQ standards through local rules adopted within state parameters. Generally speaking, development using individual wells for water supply and individual septic systems for wastewater treatment, requires a minimum lot size of about one acre. Site conditions determine the exact lot size. If a public water supply or a public wastewater system, but not both, is present, then the lot size can be as dense as one-half acre. If both systems are in place, then there are generally no DEQ limits to lot size.

“Infrastructure is one of the key considerations when planning where and how much growth occurs in a given area”

Water rights are another factor affecting land use patterns. The availability of groundwater for future growth and development is limited by the legislative closure in the Bitterroot River basin and a lack of legal water availability in the lower Clark Fork River basin. In these basins, all surface water is allocated to existing water rights and groundwater uses cannot result in depletions to surface water, which would result in adverse effect. Development within the Missoula Valley can occur in one of two ways. One is to limit the amount of groundwater required for a development and use of an exemption to obtain a water right. The other is to retire an existing surface water right and change the purpose to mitigation, offsetting groundwater depletions caused by new groundwater pumping.

Small developments, ones with only a few planned homes, generally do not need a water right. They use wells allowed through the exemption process. Larger developments will need a water right. They can acquire the water right with the property, they can purchase a water right from somewhere else, or they can connect to a public water system that has adequate capacity, typically Missoula Water. Water rights are difficult and expensive to acquire, driving larger and denser development towards areas with a public water supply.

Transportation

Missoula’s transportation system is coordinated by the Metropolitan Planning Organization, City of Missoula and Missoula County. The system is a multi-modal with a well-connected system of roads, rails, airports, free bus transit, bicycle and pedestrian facilities moves residents, services and commodities throughout Missoula and beyond. As Missoula grows, that growth will increase pressure on the system, but where and how it will increase pressure and how it can be mitigated or relieved, will depend on a long list of complicated factors.

Along with water and sewer systems, a well-connected and designed roadway network is another important infrastructure consideration when planning for future growth (Figure 6). Parts of Missoula’s road network are already congested. Improvements to the network to alleviate congestion are very expensive and funding is increasingly harder to come by.

Like most communities, peak travel times in Missoula form around morning and evening trips to work. In the county, the average travel time to work is 18 minutes. According to the 2009-2013 American Community Survey, a fairly significant portion of the workforce commutes into Missoula from other counties: 6,423 people, whereas 2,268 people commute out of the county for work.² In the urban area today, 79.4% of commuters carpool or drive to work alone and 18.8% use a mode other than driving. The number of miles traveled per vehicle has decreased in recent years.

A diverse transportation network allows mobility with or without the use of cars (Figures 7). Years of planning and investment in the community have provided residents access to alternatives like biking, walking and bus routes. But sidewalks and bike paths do more than move people; they are also part of the community’s outdoor recreation network, supporting a healthy active community and reducing the community’s contribution to climate change. Consequently, a transportation network that continues to accommodate a variety of modes should be considered when planning for growth.

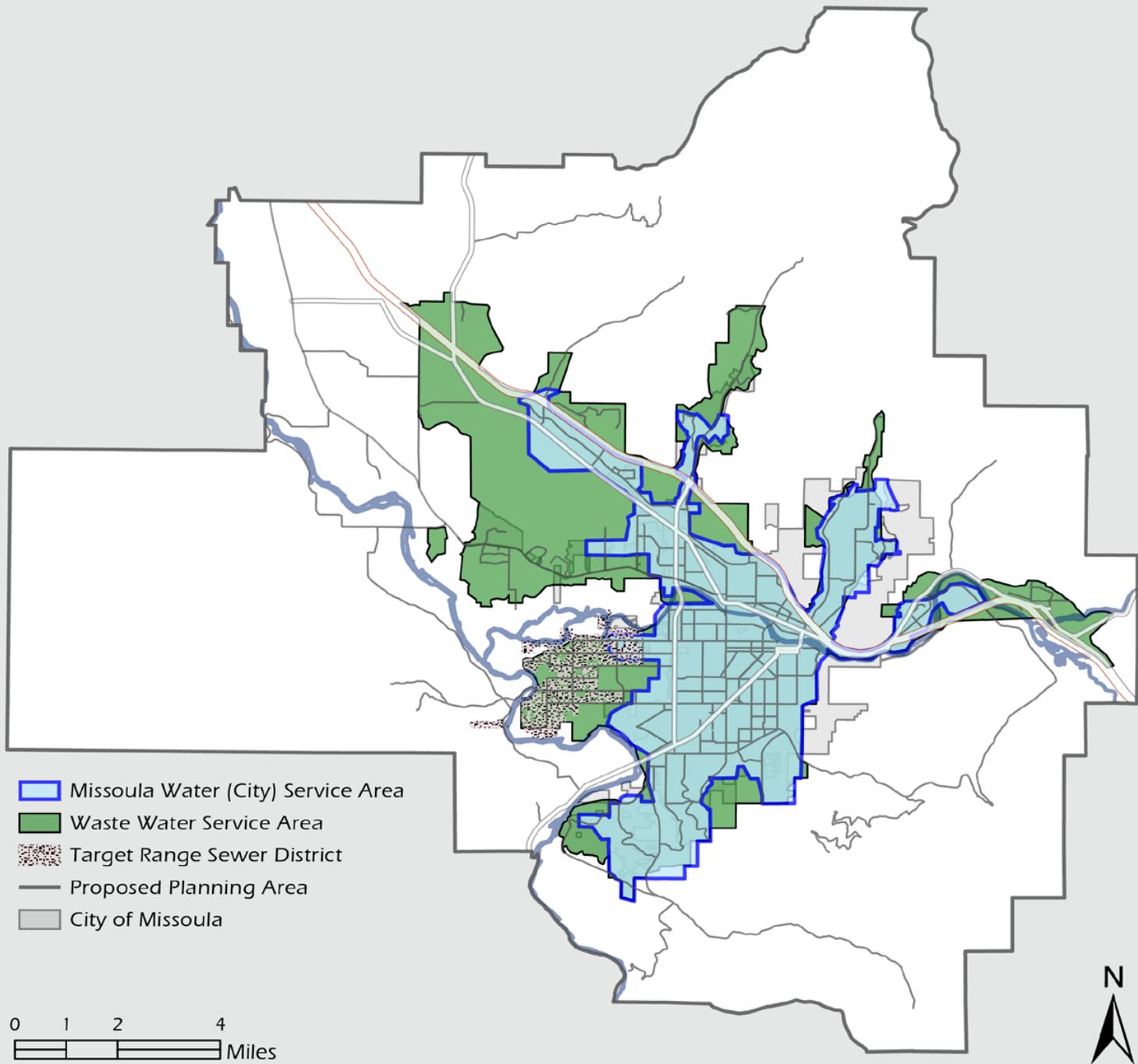


Figure 5: The City of Missoula's Water and Wastewater Service Areas



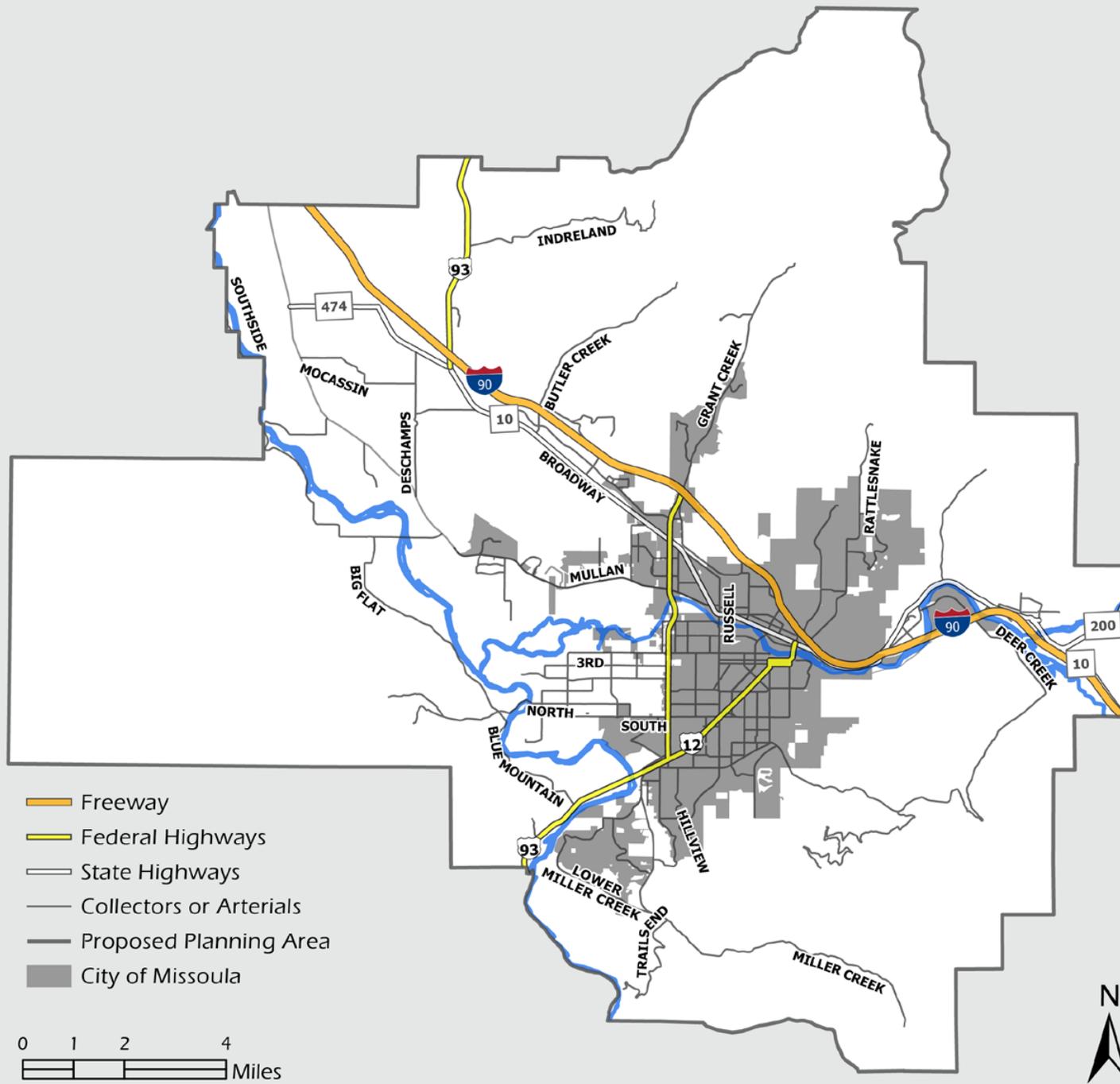
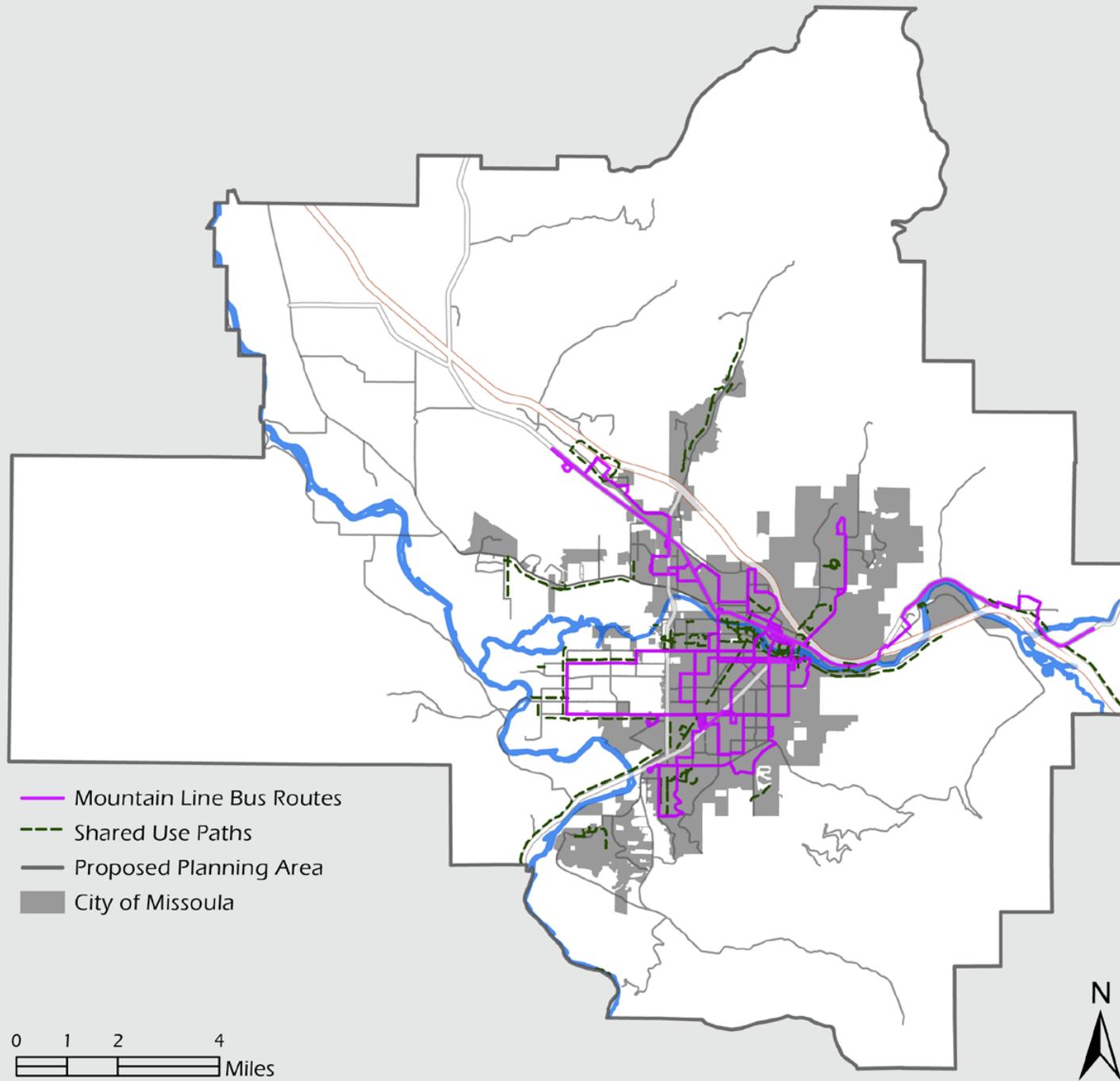


Figure 6: Motorized Transportation Network

0 1 2 4
Miles



- Mountain Line Bus Routes
- - - Shared Use Paths
- Proposed Planning Area
- City of Missoula

Figure 7: Non-Motorized Transportation and Mountain Line Bus Network

0 1 2 4
Miles



Broadband

Increasingly, broadband is viewed as a utility, part of the economic and social fabric of communities. Commercial and industrial uses increasingly require broadband access to conduct business. With 5.2% of people within the urban area working from home, access to broadband and fiber is also increasingly important for residential service³. When planning for future growth, the location of broadband needs to be recognized in plans as infrastructure. The broadband map (Figure 9) displays the number of providers of internet available throughout the Planning Area. In this case, the providers include all methods of accessing the internet, including cell service.

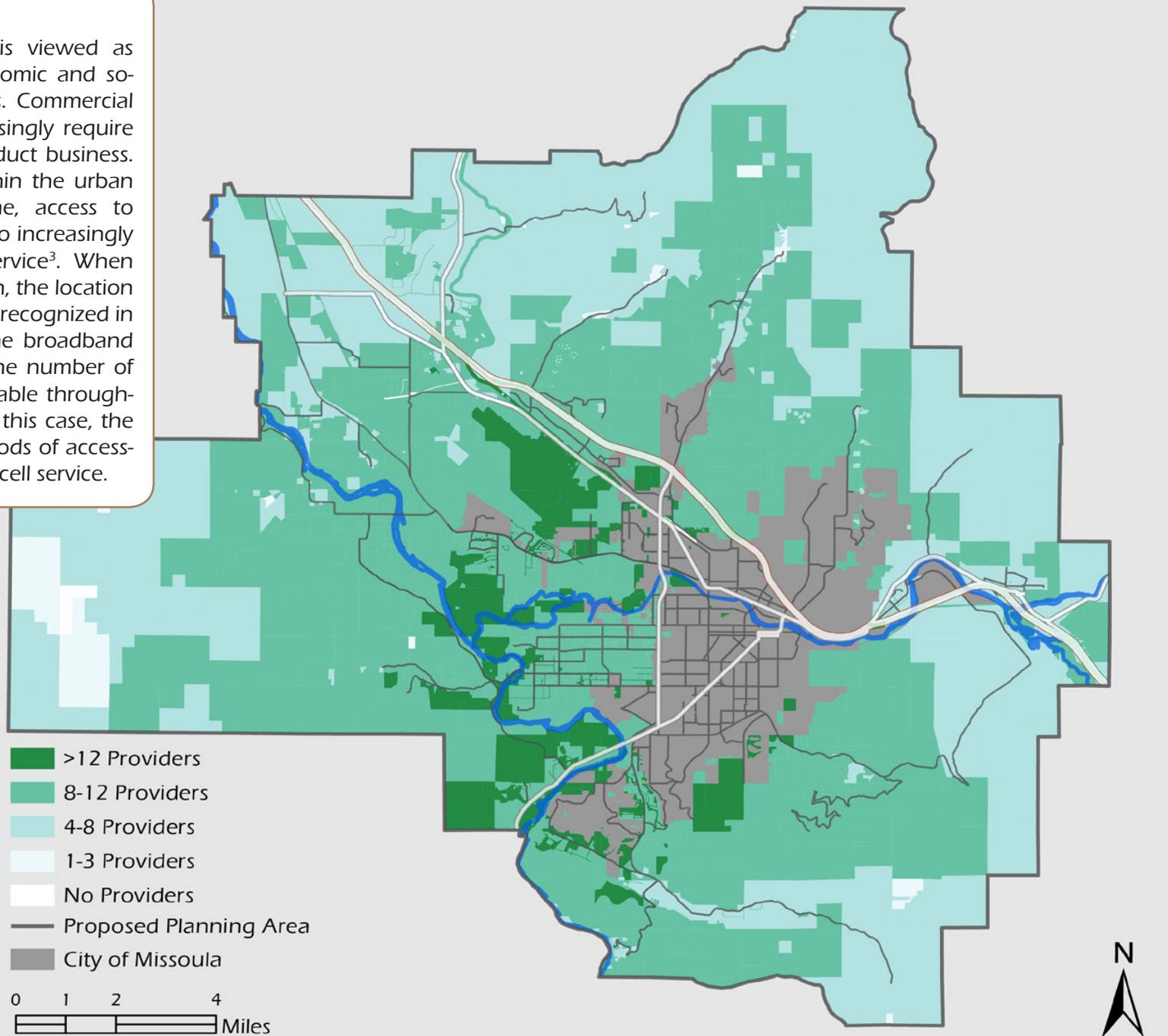
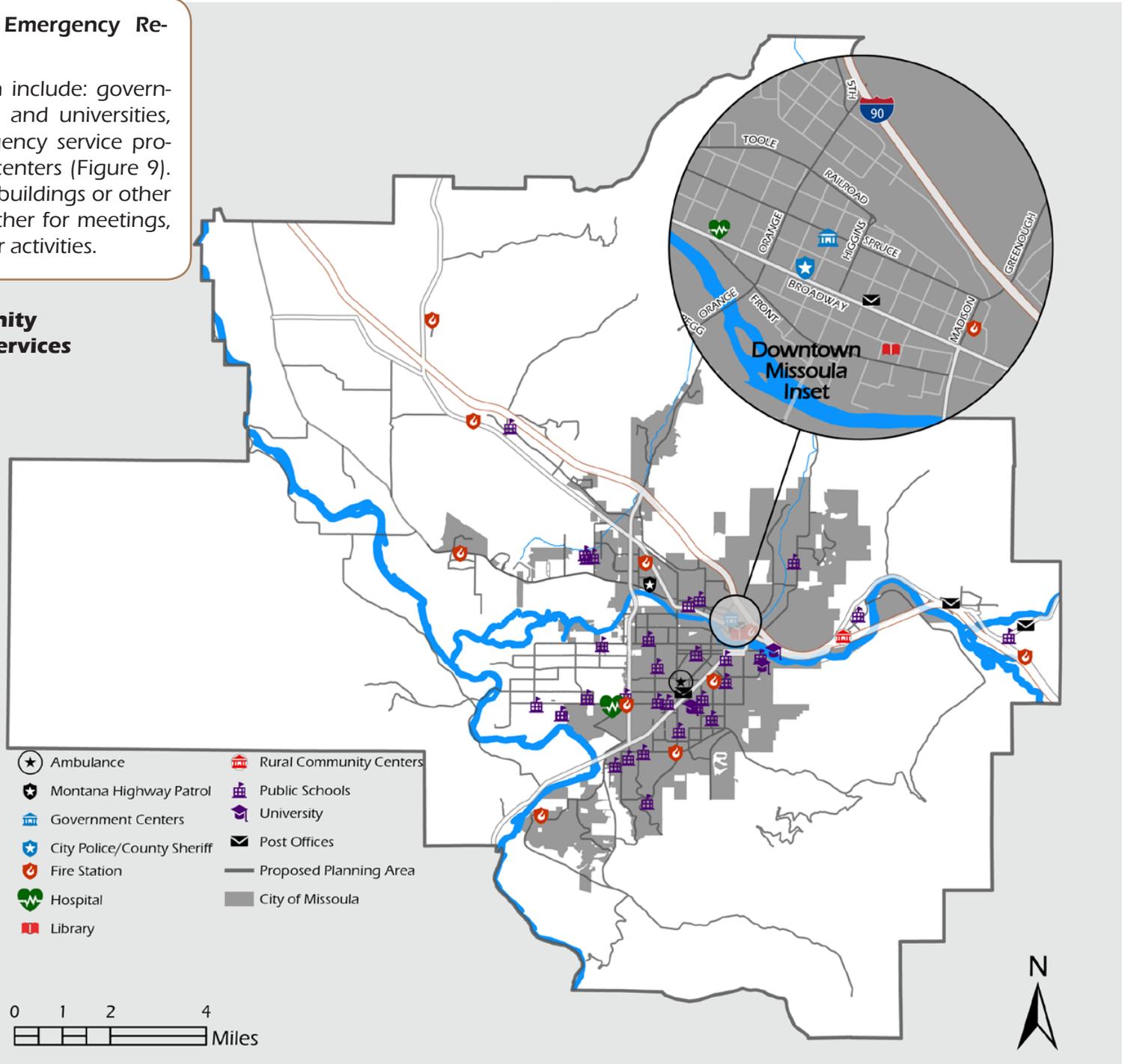


Figure 8:
Broadband Access

Community Services and Emergency Response

Services important to growth include: government centers, public schools and universities, post offices, hospitals, emergency service providers and rural community centers (Figure 9). Rural community centers are buildings or other locations where residents gather for meetings, community events, and similar activities.

Figure 9: Community and Emergency Services



School Districts

Figure 10 displays Missoula County public school district boundaries using information maintained by Missoula County's GIS Division (2010). The school districts were last updated following the 2010 Census with some minor adjustments since then for changes in population.

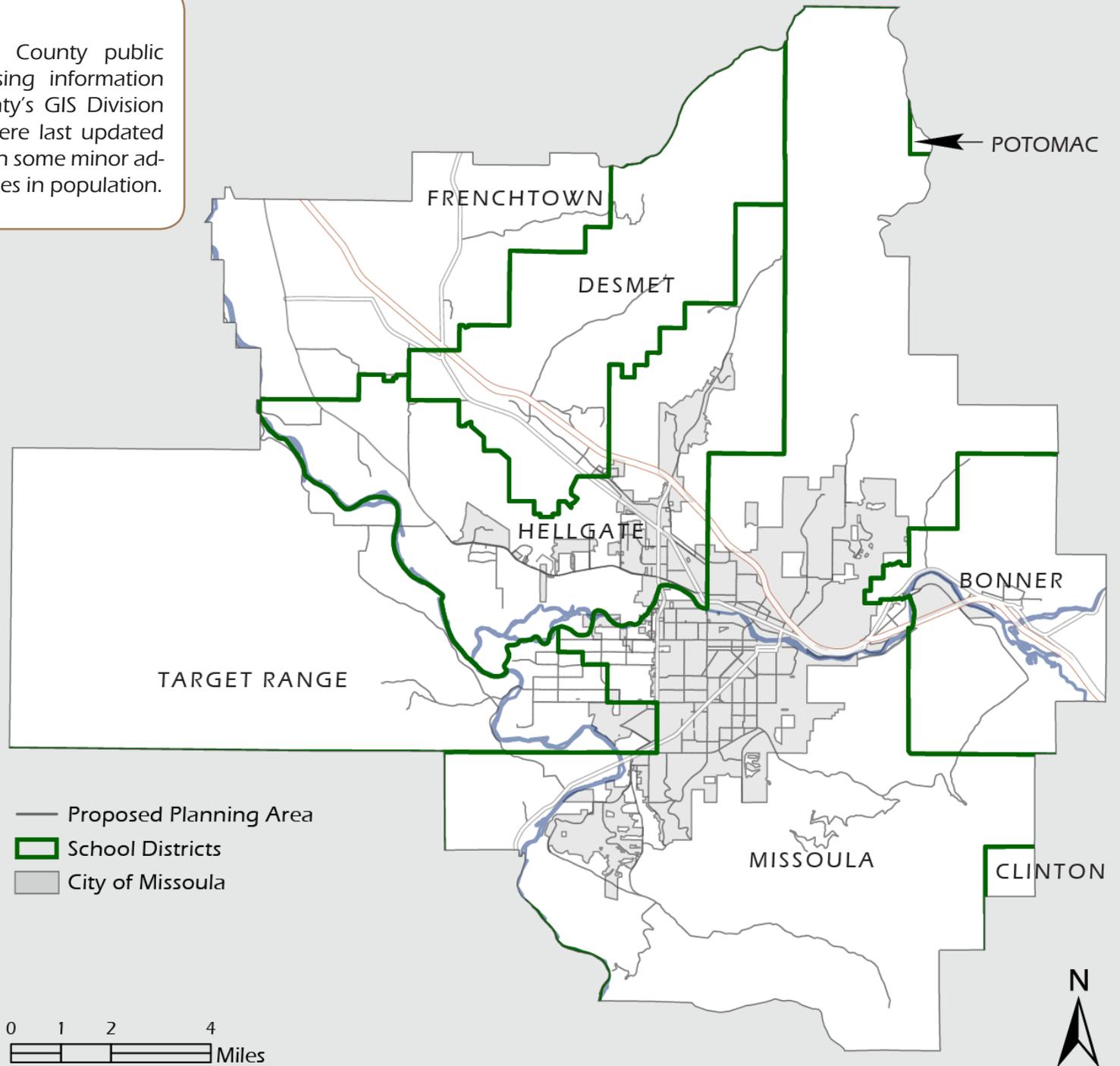


Figure 10: School Districts

Intangibles Matter

Missoula's success as a community, both as a great place to live and its economic competitiveness, is directly tied to intangible values that create a quality of life. Identifiable economic trends are occurring throughout the country and especially in the West. Knowledge- and service-based industries are becoming increasingly important players in local economies, driving employment and wage growth. These emerging sectors of the economy play by different rules than the more traditional industries because their location is not tied to natural resources, road and rail systems or the proximity to their markets. Knowledge-based industries and service sectors of the economy choose where they locate based on locational factors such as proximity to skilled workforce, wages and, increasingly, quality of life.

Missoula is never going to have the ports of Seattle, major universities like Silicon Valley or military facilities like San Diego. But Seattle is never going to be woven between two of the largest wilderness complexes in the lower 48 states, Silicon Valley is never going to have skiing 20 minutes from town and San Diego is never going to have three major rivers flowing through it. Our quality of life and proximity to public lands and natural resources is Missoula's competitive advantage in a complex global economy. It is what makes Missoula unique; it is Missoula's niche. For people and businesses who want a high quality of life defined by rare scenery, world-class outdoor recreation and a vibrant mid-sized community in one of the cleanest, wildest places on the planet, Missoula is not just competitive; it is arguably one of the more competitive communities in the country.

“Our quality of life and proximity to public lands and natural resources is Missoula's competitive advantage in a complex global economy”

Ultimately, this Planning Area Profile's main goal is to inform an update to the Missoula County Land Use Map in the Missoula urban area. There are aspects of our quality of life that can be mapped to help inform that process.

Sustainability

Sustainable development is defined as development that meets the needs of the present without compromising the ability of future generations to meet their own needs. Sustainability, which is one of the guiding principles of the 2016 County Growth Policy, is a far-reaching concept with economic, environmental, and social dimensions. One aspect of sustainability is avoiding development in hazardous or environmentally sensitive areas such as wetlands, floodplains and areas at high risk of wildfire. These goals are supported by the county's zoning and subdivision regulations, which include provisions that restrict development on floodplains, steep slopes, and riparian areas, and require a fire hazard assessment for projects within the Wildland Urban Interface.

Considering sustainability in the context of the land use map update also means encouraging growth in and around existing communities, preserving agricultural land, and encouraging mixed-use, walkable neighborhoods in order to conserve resources and accommodate a variety of transportation options for residents. Developing renewable energy resources is another important component of sustainable development. Renewable energy projects make use of free, abundant, inexhaustible resources like the sun and wind, while supporting the local economy and contributing to the community's energy security and resiliency. Missoula County recognizes the benefits of renewable energy and has committed to encouraging alternative energy development in its land use plans and policies (2016 Growth Policy, Action 4.1.3).

Public Lands

Residents make use of features like public lands, recreational facilities and open space as part of their outdoor lifestyle. Surrounding Missoula are nationally designated recreation areas, public trail systems, river accesses and state parks (Figure 12). Public lands not only contribute to recreation, but they provide working landscapes that provide jobs (Figure 11). Most public lands, with the exception of State School Trust Lands, are off limits to most development.

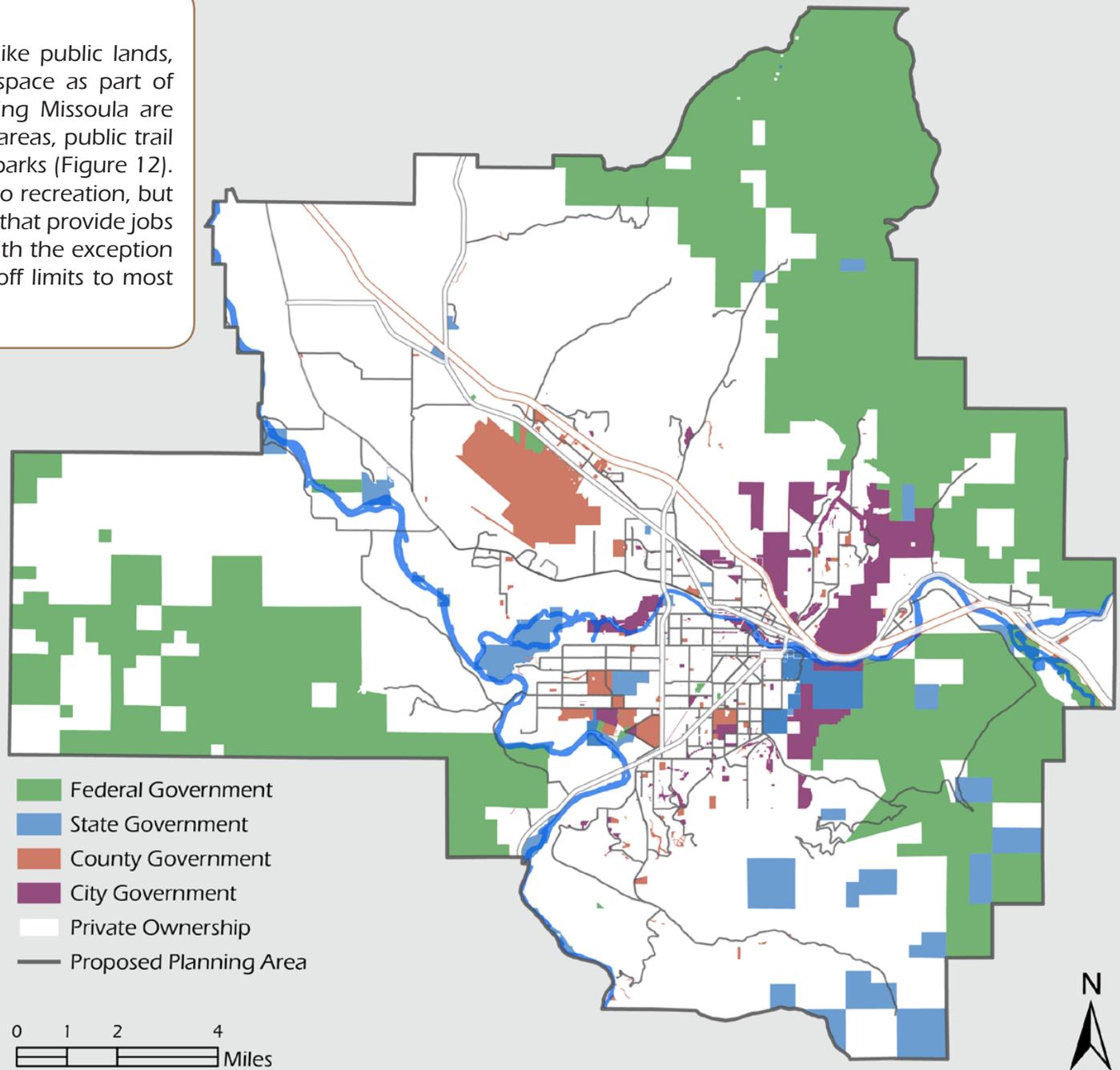


Figure 11: Public Land Ownership

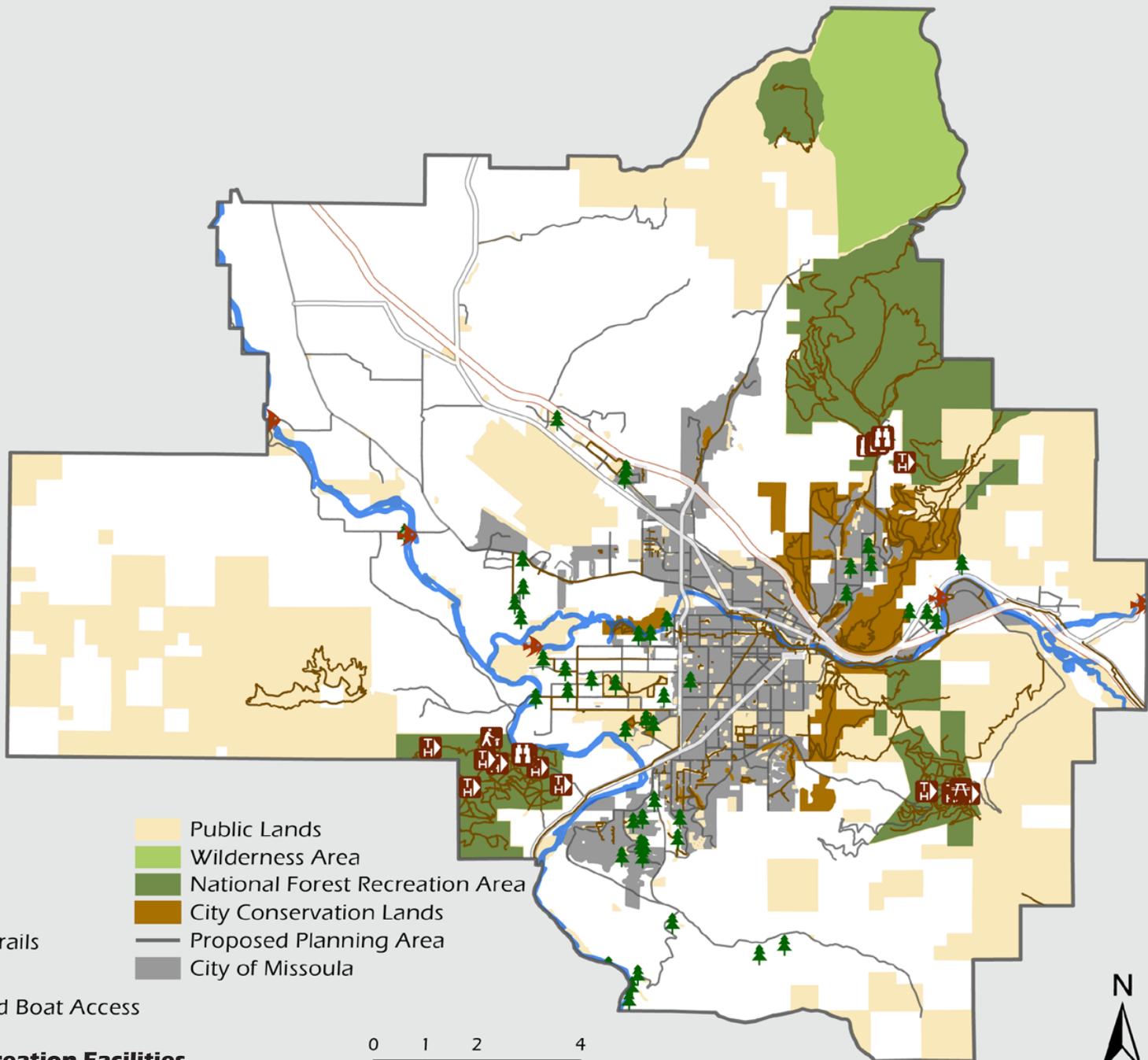


Figure 12: Public Recreation Facilities



Agriculture

Agriculture's impact on Missoula's economy is shrinking and the land area dedicated to agriculture in the Missoula area is on the decline. However, the amount of money Missoulians spend on locally produced agricultural products is on the rise. Local agriculture contributes to food security and community resiliency. There is also a distinct quality of life intangible to agricultural areas in contrast to the urban/suburban lifestyle offered in the city.

Identifying areas with potential for sound agricultural operations and locations where farms or ranches are already in operation is not always a straightforward task. For this profile, staff identified Soils of Farmland Importance, as published in 2017 by the United States Department of Agriculture's Natural Resources Conservation Service, as areas with agricultural potential. For current agricultural activity, staff used Montana Department of Revenue data on agricultural activity for use during property tax assessments cross referenced with aerial imagery. This allows for the identification of existing agricultural activity and lands with potential for agricultural activity (Figure 13).

- Current Agricultural Activity
- Soils of statewide importance
- Soils of local importance
- Prime farmland if irrigated
- Proposed Planning Area
- City of Missoula

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Miles

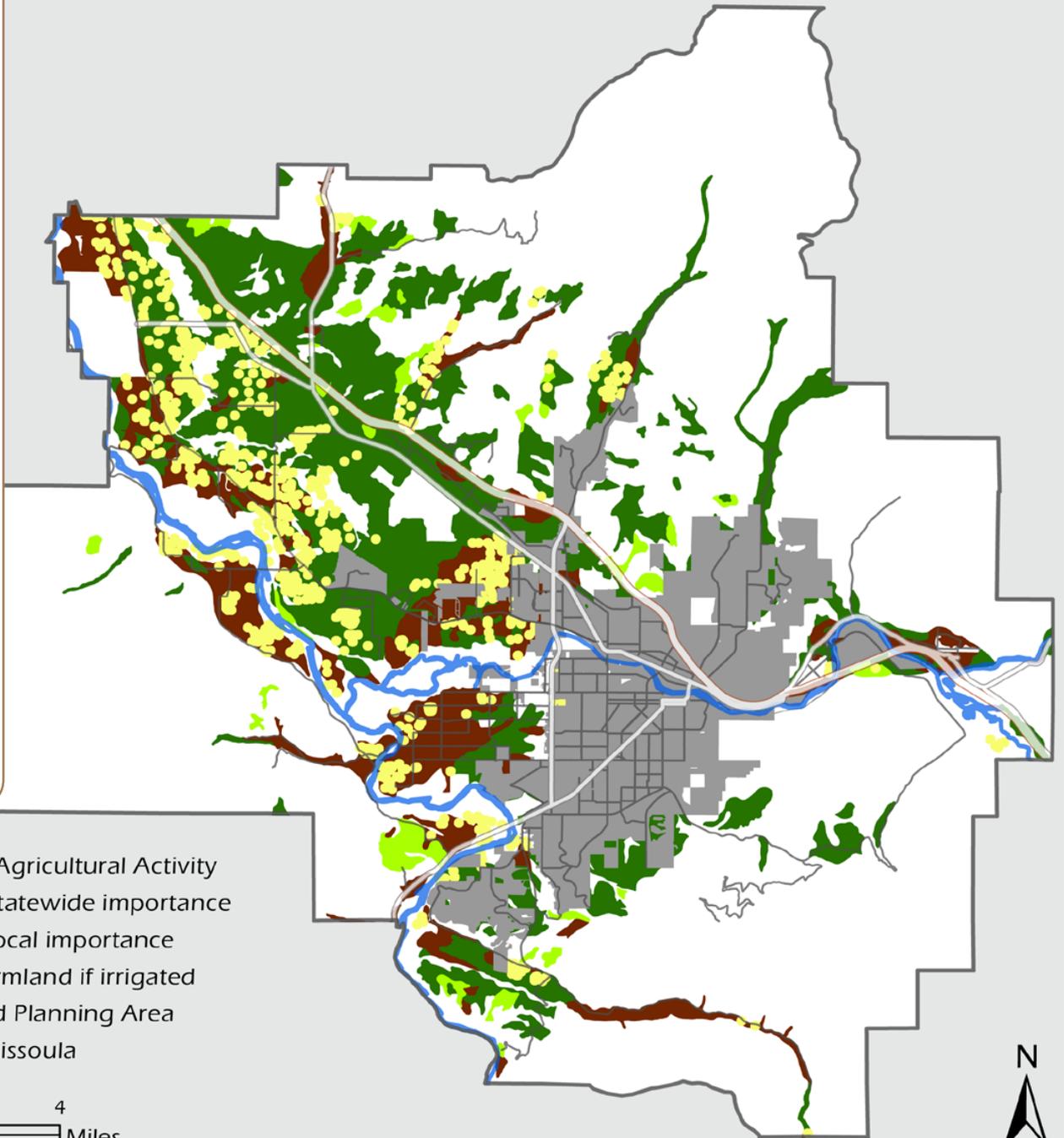


Figure 13:
Agricultural
Activity

Wildlife Habitat and Natural Resources

Missoula is nestled between two of the wildest parts of the lower 48 states. To the north is the Crown of the Continent, one of the largest intact terrestrial ecosystems left on the planet. To the south-west is the Bitterroot Ecosystem, the largest continuous congressionally designated wilderness areas in the lower 48. In between, there are river systems, wildlife corridors, big game winter ranges, a host of biota and fauna and the Clark Fork River- Grass Valley Important Bird Area, the only continentally significant bird area in Montana and one of 113 in the nation (Figure 14).

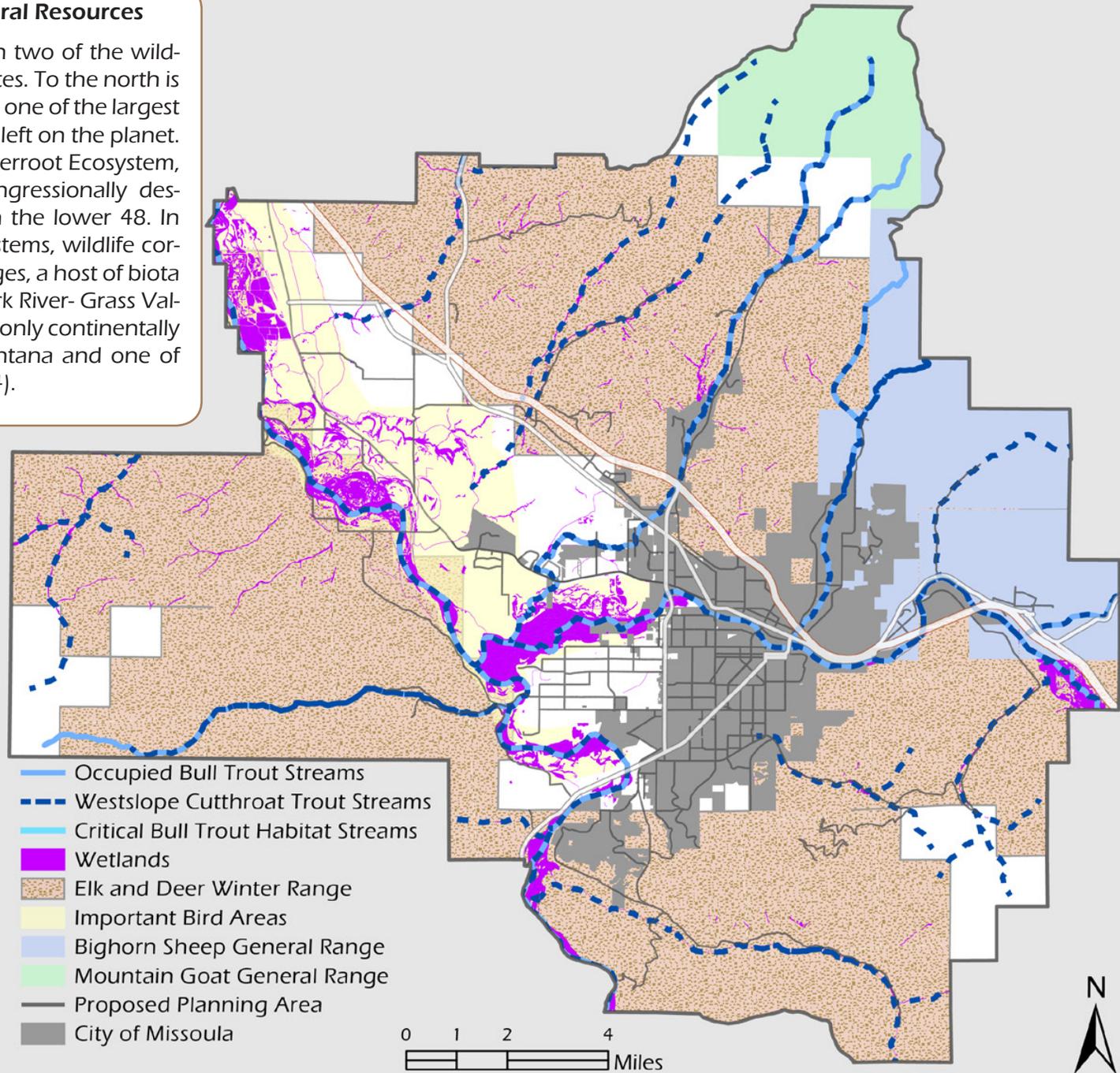


Figure 14: Wildlife Habitat and Key Natural Resources

DEVELOPMENT PATTERNS

Existing Development Patterns and Land Use

Existing Land Use Designations

Missoula County first adopted a land use map in 1975, over 40 years ago. The county has updated the map on a piecemeal basis, but there has not been a comprehensive update since its initial adoption. The 1975 land use map is not a reflection of existing land use but it does shed some light on development patterns (Figure 15). Each land use designation on the map has an associated description. The description typically includes the desired use, such as industrial or residential and the desired intensity, such as one unit per acre (See Appendix A).

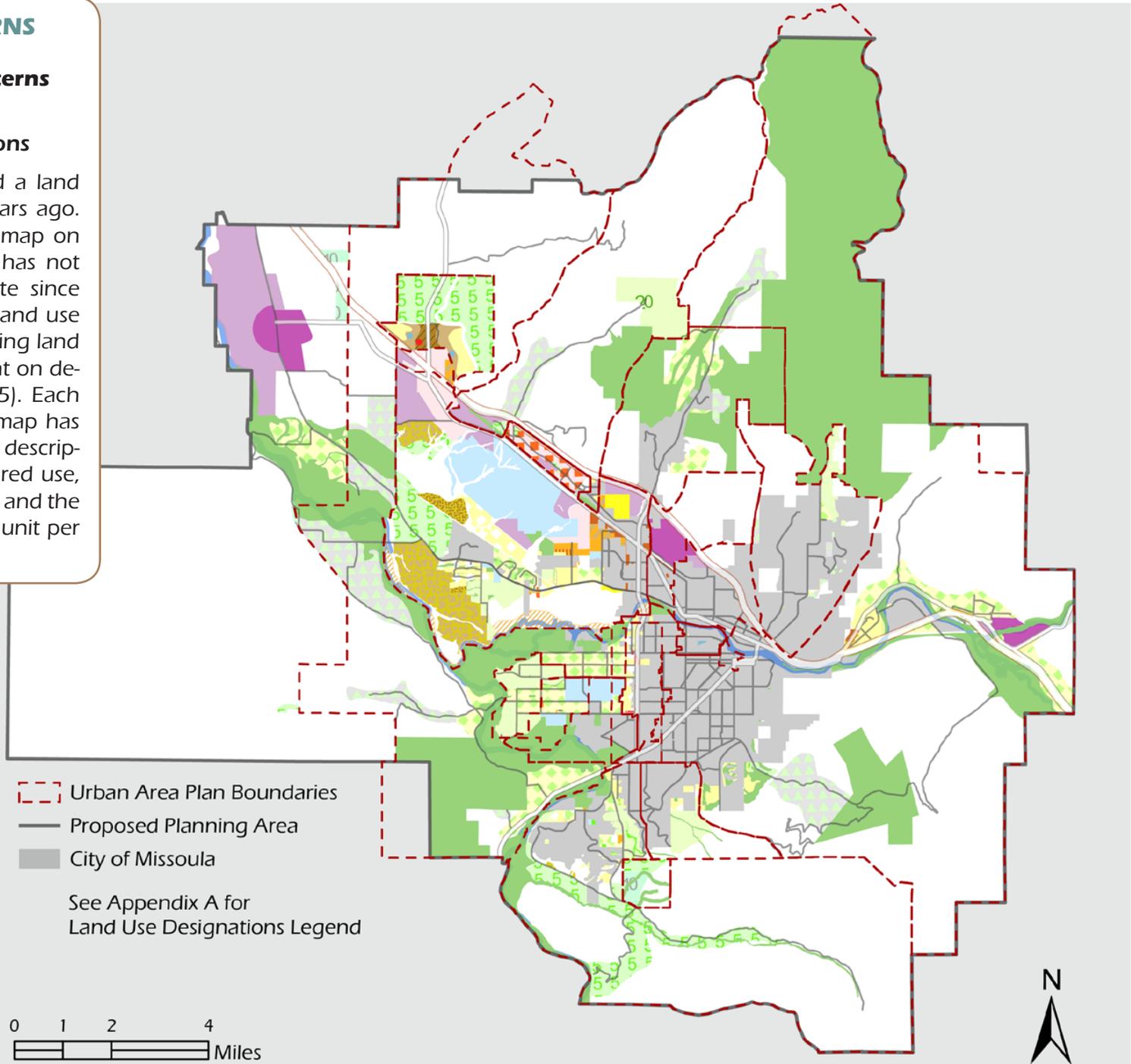


Figure 15: Existing Land Use Designation Map

Zoning

The Board of County Commissioners adopted the first County-initiated zoning regulations on July 13, 1976. Overall, 47.16% of the Planning Area is zoned, while just 6% of the county is zoned. County zoning is made up of 15 districts that represent uses compatible with public, agricultural, residential, commercial and industry categories (Figure 16). This map generalizes the 15 districts into six classifications. For example Agriculture and forestry is allowed in every zone, but in areas identified on the map as Agriculture and Forestry, it is the prominent use. Other uses, such as large lot residential, are still allowed. (Zoning discussion is continued on page 24)

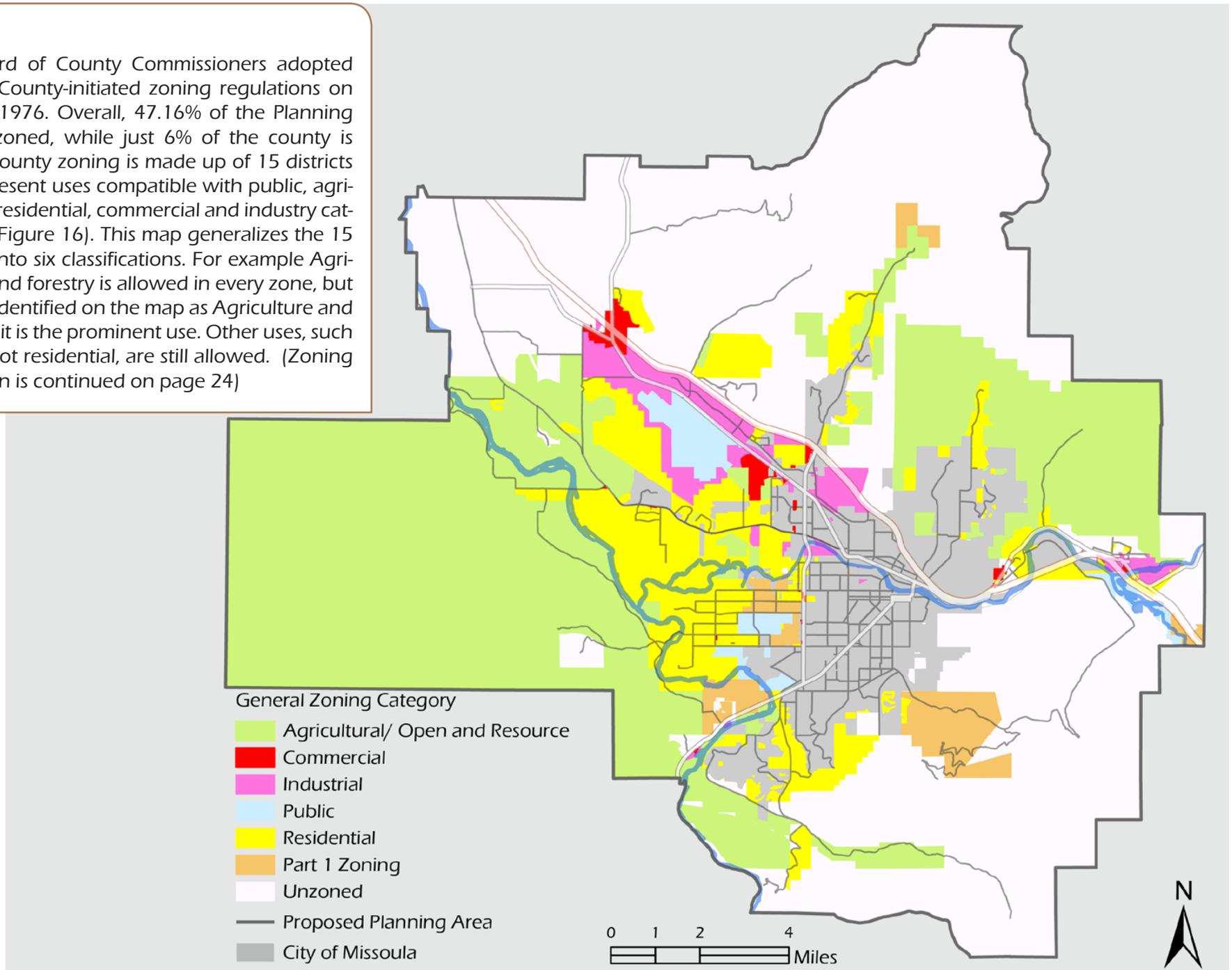


Figure 16: Existing Zoning

(Continued from page 23) The Planning Area contains a number of alternatives to these zoning districts, including planned variations, special districts, planned unit developments, rural zoning districts and citizen-initiated zoning districts/Part 1 zoning. A number of citizen-initiated zoning districts predate the 1976 County Zoning Regulations, a fair number of which are located outside the Planning Area. These districts typically cover a small geographic area or neighborhood. The most recent update to the zoning regulations, adopted on April 11, 2017, shifted to pyramidal zoning that allows residential uses in commercial districts and commercial uses in industrial districts. The update also introduced Condominium-Townhome Exemption Developments (C-TEDs), which allow zoning-compliant development of land for sale without requiring subdivision review if the land has been subdivided and is zoned. Previously, zoned and subdivided land could only be built out according to the zoning for rental development and subdivision review would be triggered if structures or portions of the land were to be sold.

Property Taxes and Land Use

In Montana, property taxes are the primary tool for funding local governments including school districts, fire districts and city and county government. Land use and development intensity influence the taxable value of property, therefore land use patterns and development intensity impact tax revenue, which then affects funding for infrastructure and services.

One method of evaluating how land use patterns relate to taxable value is to look at the taxable value of property at a per acre basis. Taxable value is the Montana Department of Revenue (DOR) estimate of the value of the land and any structures on that land. The taxable value is what the DOR uses to determine how much that specific property should pay in taxes; it is not the tax rate.

By looking at the taxable value of the property per acre, rather than by the whole parcel, it allows one to compare how the taxable value of land use types and intensities vary. It does not indicate the cost to provide services to those areas.

A quick analysis using actual parcels in the Missoula area demonstrates how this approach allows for comparison. A large box store on 20.8 acres with a taxable value of 13.2 million dollars has a taxable value of \$633,993 per acre. A single-family residence in the county with a taxable value of \$410,000 on 1.5 acres has a taxable value of around \$273,000 per acre. A single-family residence with a taxable value of \$330,000 on 0.17 acres in downtown Missoula has a taxable value of over \$2.3 million per acre.

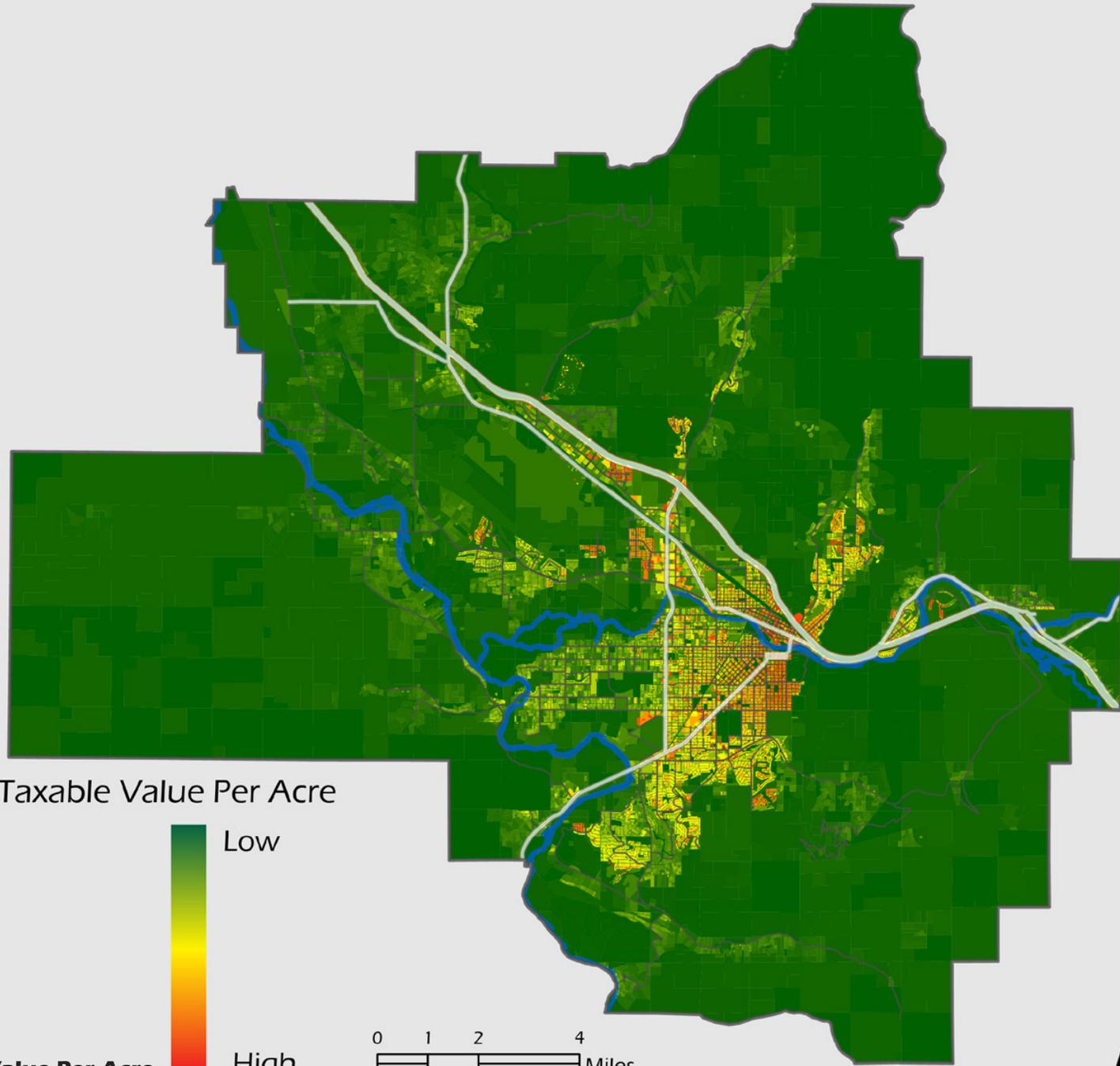
Mapping the taxable value per acre creates a heat map, with red having a high taxable value per acre and green having a low taxable value per acre. It does not take into account the financial investment related to infrastructure, it does not suggest these areas generate more taxes than they require in services and it does not represent how much they pay in taxes. This heat map is useful for visually identifying areas in the community with a higher per acre taxable value (Figure 17).

Annexation

Annexation is a tool municipalities use to change their boundaries, usually through the inclusion of new areas. Because the Planning Area surrounds the City of Missoula, any time the city approves an annexation, the boundaries of the Planning Area will change.

There are many ways cities can annex lands according to state annexation laws, but the most common way is when landowners ask for it to happen. This often happens when the city offers a service the landowner wants, typically water and sewer. The landowner and the city work out an agreement on services and infrastructure and then the city goes through a process to act on the request. There are many situations where a landowner might want to be annexed but it is most commonly because they want to develop property.

As of 2017, the City of Missoula has not adopted a Municipal Annexation Service Plan pursuant to 7-2-4732, MCA, although this might change in the coming years. Ultimately, annexation is one of the many factors that shape the Planning Area. As the city annexes areas in the county, the size of the Planning Area will decrease. If past growth patterns are an indication of future growth patterns, a majority of the growth in the Missoula area will occur in areas currently in the Planning Area, but it will be annexed into the City of Missoula.

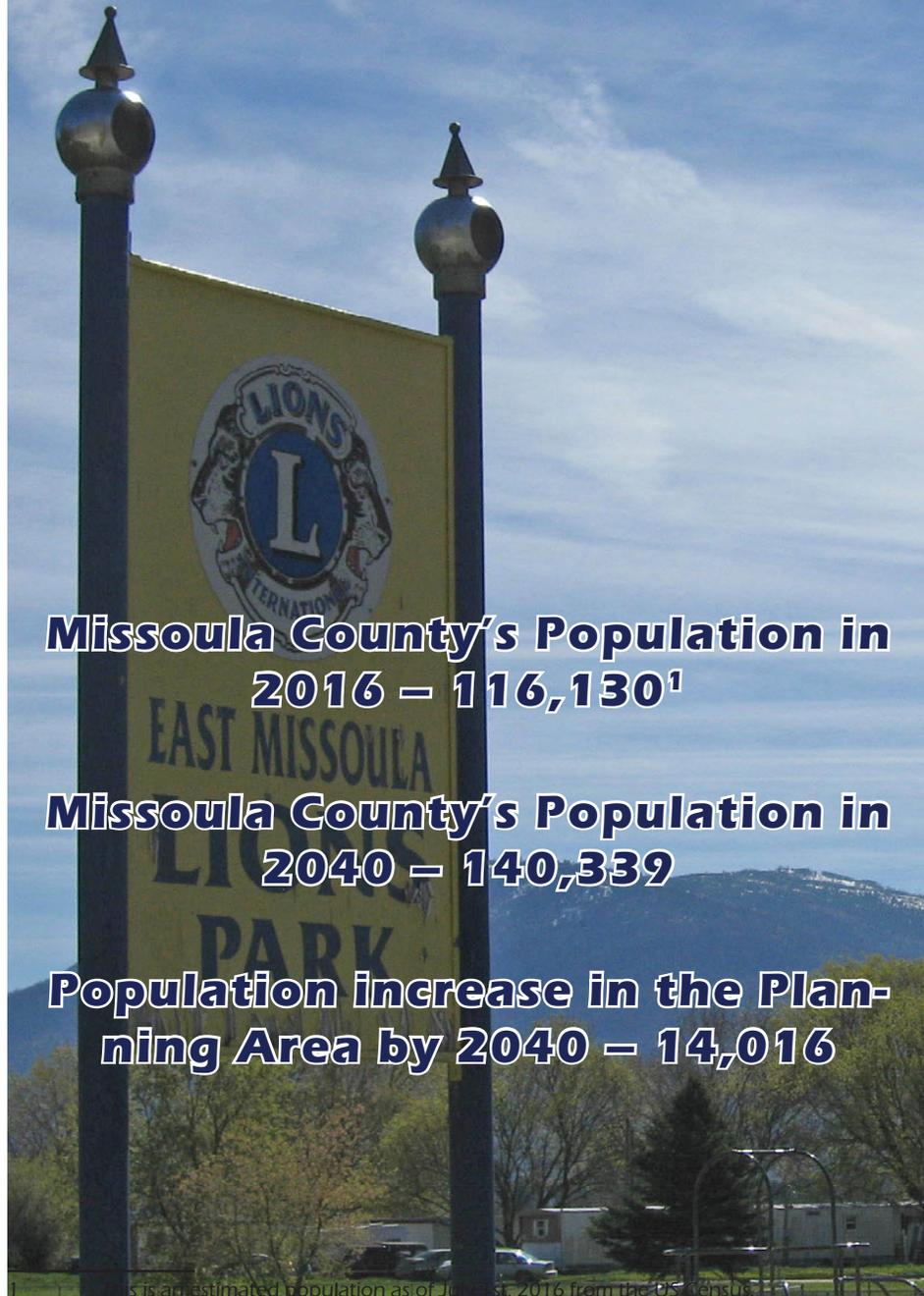


Taxable Value Per Acre



Figure 17: Taxable Value Per Acre

Chapter Three: How Much Will We Grow



Missoula County's Population in 2016 – 116,130¹

Missoula County's Population in 2040 – 140,339

Population increase in the Planning Area by 2040 – 14,016

POPULATION PROJECTIONS

Population projections are an important component for identifying future land use needs, providing insight into how a community's population and housing needs will change over time. Population projections can be complex equations involving demographic and economic data, models based on assumptions about migration, births and deaths and more. They can also be as simplistic as using a historic growth rate. Regional Economic Models Incorporated, an economic modeling firm, in cooperation with the Montana Department of Commerce developed the projection used in the Missoula County Growth Policy and in this report.

For long-range land use planning projects, a projection looking at a 20-year time frame is typical. The Missoula County Growth Policy adopted in 2016, followed the projection out to 2035, when Missoula County's population will be 137,055 people. Looking even further into the future, Missoula County's population in 2040 will be 140,339 (Figure 18). By 2040, Missoula County will have grown by over 31,000 people since the 2010 Decennial Census.

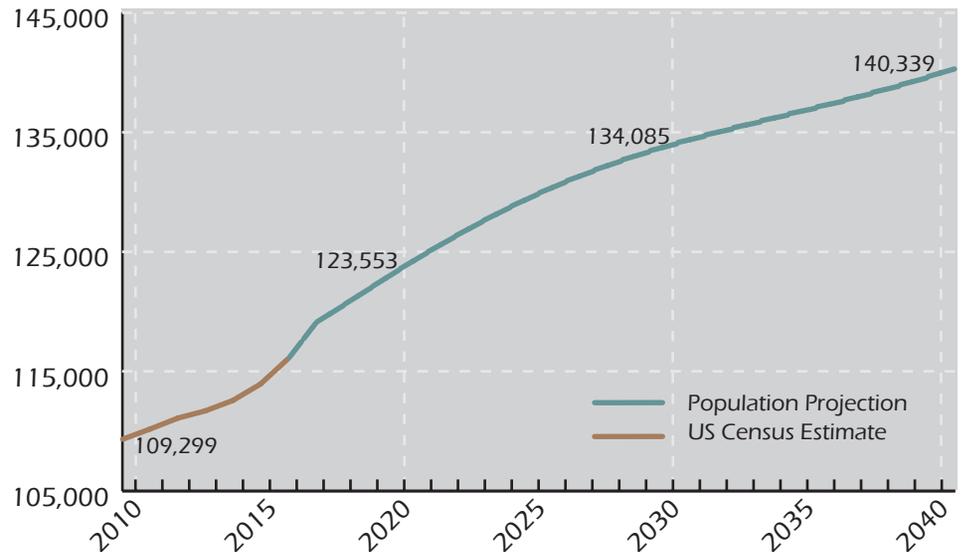
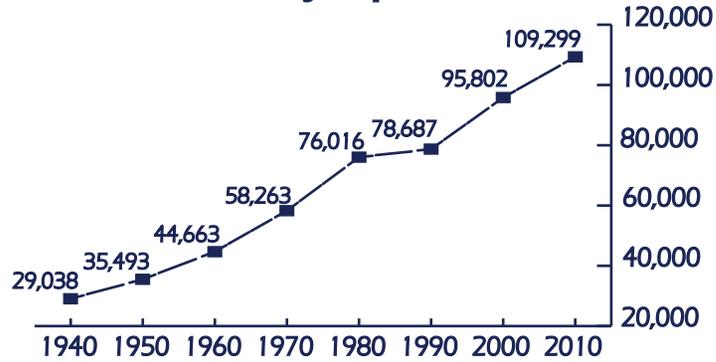


Figure 18: Missoula County Population Growth

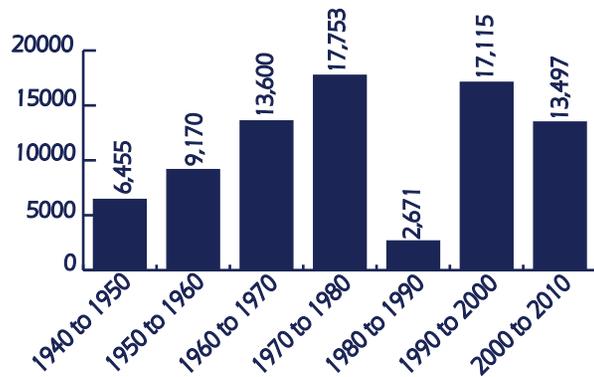
¹ This is an estimated population as of July 1st, 2016 from the US Census.

Growth in Missoula County

County Population



Growth Per Decade



Average Annual Growth Rate

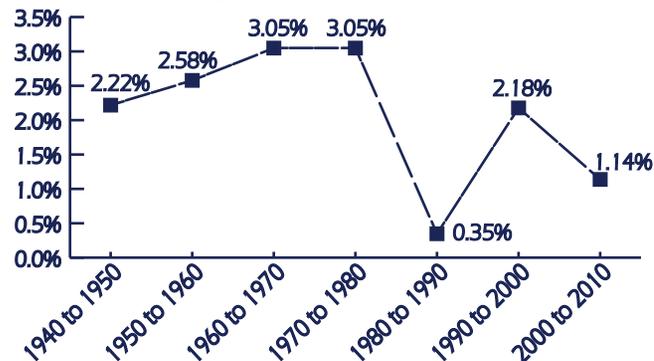


Figure 19: Growth in Missoula County by decade

HISTORICAL GROWTH RATES

Since 1940, Missoula County's population has grown an average of 2.12% annually, fluctuating between a peak of 3.05% in the 1960s and 1970s, and a low of 0.35% in the 1980s when Missoula's timber industry collapsed. Growth spiked again in the 1990s to 2.12% annually but, between 2000 and 2010, the average annual growth rate fell to 1.41%, presumably due to impacts of the Great Recession. (Figure 19) Currently, Missoula County's Average Annual Growth Rate has increased to about 1.88%, but projections call for it to decline as our population ages (Figure 20).

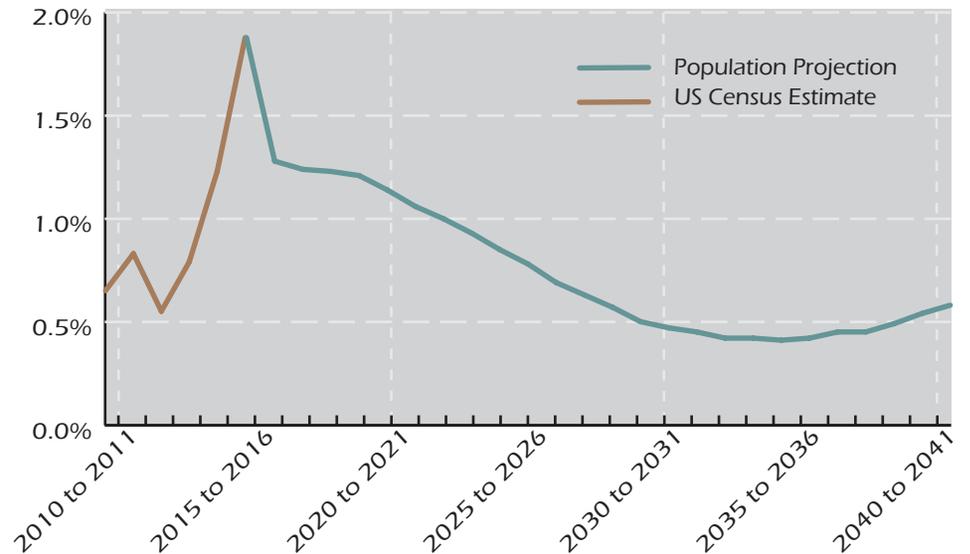


Figure 20: Missoula County Average Annual Growth Rate

GROWTH IN THE PLANNING AREA

By 2040, 140,339 people are projected to live in Missoula County, 31,040 more than the population of the 2010 census. Some of this growth will happen in the City of Missoula; some will happen in the Planning Area. Painting a picture of how much of the projected growth will occur within the Planning Area will help determine land use needs for the land use map update.

The population projection used in this document is a county-wide projection, it does not break the numbers down between the county, the City of Missoula, or the Planning Area. Assumptions are needed to assign the projected population growth to smaller geographic areas such as the

Planning Area. The simplest method is to look at how much growth occurred in these areas in the past, and assume the distribution will stay consistent in the future. In other words, if 45% of Missoula County's new growth between the 2000 census and the 2010 census occurred in the Planning Area, than 45% of the projected county-wide growth will be allocated to future growth in the Planning Area.

In 2000, the Planning Area's population was 21,375. Over the course of the next ten years, according to census data, the population of the Planning Area grew by 2,308 people. The census data does not capture growth that occurred through annexation. When including areas annexed during this decade, the Planning Area grew by an additional 3,815 people, for a total of 6,123 (Figure 21). Therefore, when accounting for annexation, 45% of the county-wide growth occurred in the Planning Area (table 4).

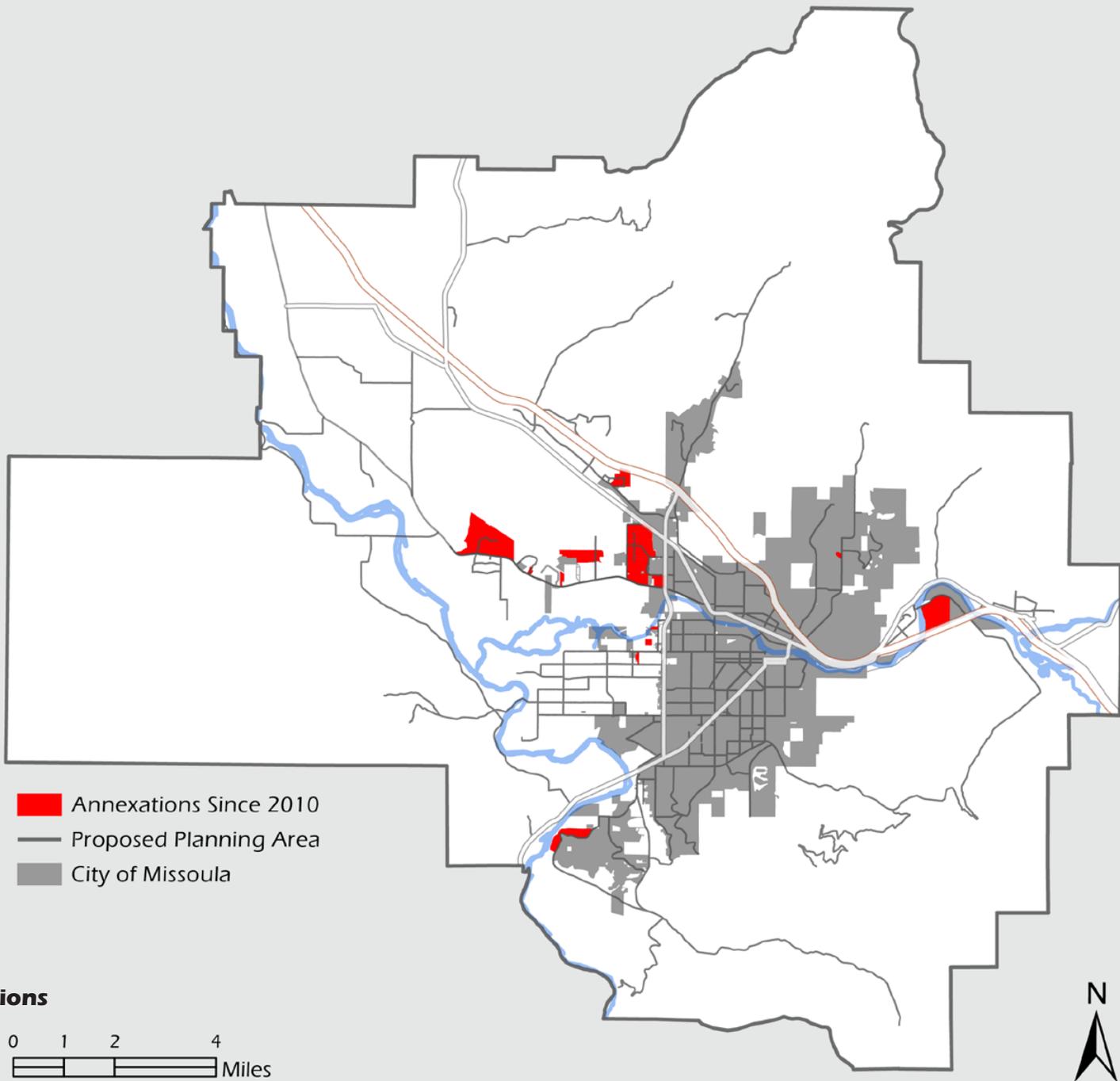
Table 4: Planning Area Growth between 2000 and 2010 When Adjusted for Annexation

	Missoula County	Planning Area not adjusted for annexation	Planning Area adjusted for annexation
2000	95,802	21,375	21,375
2010	109,299	23,683	27,498
Difference	13,497	2,308	6,123
% of Total Change	100%	17%	45%

Missoula County is projected to grow by 31,040 people between 2010 and 2040. If 45% of Missoula County's population growth occurs in the Planning Area, the population will increase to 37,604 by 2040. This is an increase of 13,921 from the 2010 population of the Planning Area. With history as our guide, much of this new growth will likely be annexed into the city. Between 2000 and 2010, 62% of the population growth in the Planning Area was in areas annexed into the city.

The role of annexation in the Planning Area is challenging to describe. Areas annexed into the city always start out in the county, they are within the county's jurisdiction and subject to the county's development standards. The county plans for these properties, and the census counts the

residents as part of the unincorporated population of Missoula County. But when annexation occurs, the property owners have access to city services and can develop at city standards. Development is usually done at higher densities than in the county, and the new population is then counted by the census as within the City of Missoula. In these edge areas, county and city officials try to work together planning infrastructure, land uses, and regulations to coordinate shared goals. This is why the county needs to think about how much growth within the Planning Area will be annexed into the city, it is to better recognize both the county and city play a role and coordinate planning and development in this area than it is to plan in a vacuum.



**Figure 21: Annexations
Between 2000 and
2010**



Chapter Four: How Will We Grow



The Planning Area Profile is one tool that will inform the process of updating the land use map for the unincorporated areas surrounding the City of Missoula. It focuses specifically on how much growth we might expect to occur and how the growth relates to commercial, industrial and residential land use. As growth occurs, these land uses will be the primary driver of change of our developed landscape. This chapter will discuss trends affecting development patterns for these three land use types in the Missoula area in order to create a picture of how our community might change over time.

This chapter is divided into three sections: commercial trends, industrial and manufacturing trends and housing trends. Each section contains a discussion on how local and national trends could impact land use and considerations for the land use map update.

COMMERCIAL

Commercial Land Use Trends

Nationally, the influence of the internet is changing the retail landscape. Recent Bureau of Labor and Industry job reports show retail is shedding jobs, though the losses are impacting some sectors like retail department stores much more significantly than others.⁴ The Urban Land Institute's 2017 Emerging Trends in Real Estate report indicates that investors are not necessarily pessimistic about retail, but are rather refocusing their investments towards small retail centers with specialized characteristics, such as niche markets and lifestyle centers with mixed-use development, rather than traditional box stores and power centers.⁵

Consumer preference is also impacting the makeup of retail. The preference for living in, near and spending time in mixed-use areas is increasing.⁶ ⁷ People are looking for retail that integrates within residential neighborhoods, or centers within walking distance to residential neighborhoods.⁸

While there is an increased preference for mixed-use walkable areas, single-use auto dependent retail development typical in suburban locations is not going away. According to the International Council of Shopping Centers, single use commercial centers continue to have solid leasing numbers.⁹ Trends indicate suburban retail will transform into places that sell experiences and not just goods.¹⁰

How we use office space is also changing. We are using less space per person; the industry standard of square feet per employee has declined

from 250' to 170'. Trends indicate there will be demand for suburban office space, but it will be built in proximity to amenities, retail and transit.¹¹

Missoula County is seeing an increase in commercial activity. Inquiries to the Community and Planning Services office about potential commercial applications are on the rise. The Missoula County Building Division of Public Works does not differentiate between commercial and industrial uses when issuing a building permit, but these combined permits are up. Hotspots for building permits issued by the county are the Wye and the Airport Industrial Park. Additional areas of interest in Missoula County include Highway 93 South and Lolo. There are some common denominators in these areas of interests, including:

- high volume traffic corridor or close access to a highway;
- public water; and
- public sewer.

In the City of Missoula, permit activity was also up during 2017 with certain locations acting as hot-spots. The area just south of Interstate 90 on North Reserve, near Consumer Direct, is drawing interest for office space. Midtown Missoula is attracting redevelopment activities, especially for office space. The common denominators of areas of interest in the city are:

- available Tax Increment Financing (TIF) funds; and
- proximity to high volume traffic corridors

A national trend that is also taking place in Missoula is the development of lifestyle centers. Lifestyle centers are a type of mixed-use development that combines traditional retail functions with offices, residences, bars, restaurants and built-in amenities, such as parks or entertainment facilities. The Riverfront Triangle is a planned lifestyle center in downtown Missoula that has attracted over \$150 million in investments. Just across the Clark Fork River, the Old Sawmill District is marketing its proximity to a new park, minor league baseball stadium, the Bitterroot and Milwaukee Trails and a developed river access. Further south on the Bitterroot Trail, Southgate Mall is in the process of implementing a redevelopment plan that will bring in a niche grocery store, movie theater and a future residential component.

The development of lifestyle centers in Missoula could indicate the community is changing demographics and/or attracting developers with connections to national investment networks. In addition, the use of TIF funds allows the demolition and adaptation of existing uses, making the rede-

velopment of underutilized areas for lifestyle centers economically viable. While lifestyle centers are becoming a part of the Missoula urban fabric, there are a lot of unknowns about how to plan for them in the future, especially in regards to the demographics and income levels needed to support these facilities.

Another national trend occurring in Missoula's urban area is the development of smaller mixed-use nodes with commercial and residential components in or near existing neighborhoods. A prime example is the area near Little McCormick Park on Toole Avenue. Unlike lifestyle centers, the development of mixed-use nodes occurs incrementally over time and involves multiple developers and properties. For these nodes to occur, regulatory conditions have to support organic growth or, in other words, conditions need to allow for the natural progression of a market driven transition.

Missoula will continue to serve as a regional center for retail, office and commercial land uses, drawing residents from surrounding rural communities. This means we will likely see continued development of auto-centric retail, office and commercial land uses. For example, population increases in the Bitterroot Valley may draw additional commercial interest towards the south end of town and could increase the role of Midtown Missoula.

Key Considerations for the Land Use Map

Commercial Land Use

- The availability of infrastructure is key to locating office, retail and commercial land uses
- Most new major commercial developments will likely be annexed into the city
- Identify locations for small-scale, mixed-use (retail, food service) to serve existing neighborhoods

Considerations for the Land Use Map Update

The availability of infrastructure is key to locating office, retail and commercial land uses. Access to public water, public sewer and major roadways are the most critical considerations, with land prices and population growth also being influential factors. While the land use map will need to plan for where commercial development is most appropriate, the infrastructure necessary for commercial development means most of the new

development will be annexed into the city, highlighting the need for city and county collaboration when creating annexation policies.

Trends suggest that consumers want mixed-use retail integrated within or near neighborhoods, but that the people need to reside there first. Fringe areas appear to be under-served by small-scale retail and Missoula is seeing a decrease in neighborhood goods and services due to competition from big box stores and local neighborhood opposition to new development. The key provision for commercial and retail integration into neighborhoods is the businesses' economic vitality. Creatively pairing retail and services with eating and drinking establishments could provide new focal points for neighborhood activity and improve economic viability. The land use map update should consider areas for small-scale commercial that serves neighborhoods and can function in a mixed-use environment.

INDUSTRIAL

Industrial Land Use Trends

Both a shift in the national economy and the influence of the internet are changing the industrial landscape. After decreasing for more than two decades, manufacturing employment has consistently increased for the last several years¹² and the Urban Land Institute's 2017 Emerging Trends in Real Estate report refers to industrial as the "most favored sector for the past two years"¹³ for real estate investment, indicating a demand for industrial land.

Online shopping, which shows no signs of slowing, is a leading driver in industrial land being used for distribution of goods. Today, we see concepts such as "last mile distribution" and "flex space" moving in where the manufacturing sector previously had a foothold. One of the most significant trends in industrial real estate is the growing dominance of warehousing used for storing products for Online distribution for big box retailers.¹⁴

While large, Amazon-level distribution centers are becoming more prevalent, there is also a growing demand for smaller and mid-size buildings to meet the demand for same-day and next-day delivery service. Retail spaces are converting some of their square footage to warehousing in order to meet same day delivery expectations. Increasingly, previously separated land uses such as industrial and retail are being combined efficiently on industrial land to facilitate both producing and selling a product in one location.

Both nationally and locally, manufacturing has been in a long decline. Today, manufacturing generates one-third of the labor earnings it generated in 1979.¹⁵ Overall, the county has seen growth in transportation, warehousing and utilities with a shift from durables manufacturing (e.g., woods and metals) to non durables (e.g., petroleum refining and chemicals). But in recent years, manufacturing has made a comeback.

Nationally, smaller-scale manufacturing of items such as furniture, software and food is driving the growth in manufacturing employment. According to the Brookings Institution, in 2007 more than 50,000 manufacturers employed fewer than twenty people.¹⁶

Known as the "Maker Movement," the reversed trend in manufacturing is led by individual and small-scale proprietors fueling business creation and driving new manufacturing growth.^{17,18} Montana appears to be tapping into the trend. The Kaufmann Index produced by the Kaufmann Foundation consistently ranks Montana towards the top in the country for entrepreneurship.¹⁹

Since 2010, Montana-based manufacturing employment has grown much faster than for the nation, increasing from 16,400 jobs in 2010 to 19,400 jobs in 2016.²⁰ The key take away is Montana-based manufactures are predominantly small operations; with 50% employing four or fewer persons.²¹

Key Considerations for the Land Use Map

Industrial Land Use

- Expand existing industrial areas
- Locate new industrial areas near existing infrastructure, housing, and emergency services
- Industrial uses increasingly need commercial components
- Provide locations for start-ups in a live-make environment

Considerations for the Land Use Map Update

Missoula County will play a pivotal role in planning for industrial lands

now and into the future. The influence of industrial lands within city limits is decreasing as former industrial sites convert to housing and commercial uses. However, in the county, industrial lands are in high demand and there is actually a shortage of shovel-ready properties as discussed in the Industrial Lands Assessment for Missoula County.²²

Industrial lands require high levels of infrastructure, including access to major road networks, rail lines, internet, water and sewer. How to plan and pay for that infrastructure will be considered in the land use mapping process. The county has successfully used TIF districts to enhance the infrastructure necessary to serve industrial lands.

A second consideration is to expand upon existing industrial areas. Creating new industrial areas that are not supported by nearby services may be necessary, but could require large investments in infrastructure and require expansion of services. In the county, industrial lands rely on rural fire departments, the further out from the urban core, the more the likely the rural fire departments rely on an all-volunteer staff. If not located near road and rail, industrial lands may put pressure on inadequate transportation systems or put jobs in locations where there are not places to live.

One of the key consideration for the land use map update is ensuring that the employment centers are in proximity to residential areas. The heavy polluting smokestack industrial centers from the past are not expected to come back to Missoula. As home prices rise and transportation costs for families become a greater concern, planning for industrial lands near existing or expected residential areas will allow shorter commutes and lower transportation costs. Buffers and separation will still be needed, but not in the way they were in the past.

Not all industrial uses are big, land consuming, infrastructure-intensive and incompatible with their surroundings. In fact, small manufacturing, which is making a big comeback, can be compatible in residential areas providing spaces for entrepreneurs to start their business in a live-make environment. These Maker Movement opportunities can be constrained due to existing land use policy, but can also benefit from the right zoning tools. Through planning, the county can identify areas where live-make arrangements are compatible in existing neighborhoods. Defining industry, manufacturing and live-make will be key to county land use planning efforts.

HOUSING

Housing Trends

Affordability

The rising cost of housing is the largest issue currently facing the Missoula housing market. Numerous entities are working on defining the issue and developing possible strategies to address the issue. The City of Missoula's Office of Housing and Community Development is focused on creating a housing policy for the city by the Spring of 2019. The Missoula Organization of Realtors (MOR) has teamed up with the city and county to look at barriers to building affordable housing in the community. In addition, there are numerous nonprofits that focus on pairing people in Missoula with affordable housing options.

Missoula County has not adopted a definition for what is considered affordable housing. Lacking an adopted term, a common way to define affordability is by using the U.S. Department of Housing and Urban Development's (HUD) definition of gross housing costs that do not exceed 30% of the household pre-tax income, including utilities.²³ When transportation is also included, costs not exceeding 45% are considered affordable.²⁴ Another housing affordability term is "rent burdened" households, which are defined as households that spend more than 30% of pre-tax income on rent. Severely rent burdened households spend more than 50% of pre-tax income on rent.²⁵ The MOR report may provide more insight into what affordable housing means in Missoula County.

The price of land can have a significant impact on housing price. In Missoula, our geography creates physical constraints, limiting lands available for housing and other development. In addition to geography, the availability of infrastructure can play a role in land prices. A study by the U.S. Bureau of Economic Analysis found that land near infrastructure and existing development generates more economic activity and has higher land values. Overall, one-third of housing costs are attributable to the land price.^{26,27}

The tight geography and location of infrastructure may be playing a role in the increasing cost of housing in the Missoula market. Elasticity is a term used by economists to measure how the price of a good responds to changes in supply and demand. In real estate, inelastic housing markets tend to experience disproportionately large price increases in response to small increases in housing demand compared with elastic housing markets. In inelastic markets, the price of housing rises when there is increased

demand or limited supply but it does not recover when demand subsides or supply increases. Communities with inelastic housing markets are often constrained by geographic limitations, regulatory requirements, or both.

According to a 2016 study by Paul Emrath with the National Association of Home Builders, land use regulations can limit housing inventory; and often the stringency of land use regulations increases with population.²⁸ In cities with an inelastic housing market, even when demand for housing is high, if buildable land is scarce and/or regulations restrain construction, few new housing units are built and prices rise higher. In some cities with physical constraints that limit developable land, growth pressures create support among current homeowners for stricter land use regulations, further increasing home values.²⁹ It is not clear if Missoula's housing market is currently inelastic; further study may be warranted.

Missoula County's comparatively low household income is contributing to the housing issue. In 2015, the national median income was \$56,516 and the median home price was \$227,700.^{30,31} Meanwhile in Missoula County, buying power is stretched thinner by a lower median income, \$46,164 (over \$10,000 lower than the national median) and higher median home price, \$270,000 (over \$40,000 more than the national median).³²

The price of housing also affects renters. Between 2012 and 2015, the share of rent-burdened and severely rent-burdened households fell, thought to be largely due to an increase in higher income households entering the rental market. The share of households spending more than 30% of their income on rent hovers just under 50% and the share of households spending more than 50% on rent payments is around 25%.³³

The emerging sharing economy deemphasizes ownership, correlating to the expected surge in housing rental rates in the long term. The sharing economy is a system in which people rent, borrow, or share commodities, services and resources owned by individuals, usually with the aid of Online technology in an effort to save money, cut costs and reduce waste. The trend is associated with an expected fall in homeownership rates from 63.7% in 2017 to 60.8% by 2025, which is the lowest since the 1950s.³⁴ At the same time, the short-term rental sector within the sharing economy, sites like AirBnB or VRBO for example, places added pressure on rental inventory by taking potential units out of the long-term rental market.

Location and Preference

In many real-estate markets, buyers typically employ a strategy that lever-

ages their buying or renting power by trading proximity to services for home or lot size. For example, buyers looking for larger homes may accept a longer commute in order to get more home for their dollar, while other buyers might purchase a smaller home in order to be near downtown. Nationwide, the demand for homes on the urban fringe is decreasing as the high costs of construction and transportation add to the price of homes located further from town, minimizing the advantage of relocating to cheaper land.³⁵

Increasingly, the construction of smaller homes at higher densities in desirable locations, i.e. those seen as walkable, dense, diverse and close to transit, continues to advance the location trade-off. Top considerations for buyers when choosing a neighborhood include area quality, convenience to work, affordability and school district quality.³⁶

When deciding on a home to buy, younger buyers think commuting costs are more important than heating and cooling costs, although the latter top the list for older buyers.³⁷ Single-family homes remain the most common and most desirable purchase, making up 83% of sales, while town-homes and condos in central locations become more desirable if affordably priced, building on the increasing rate of transportation costs being factored into home buying decisions.³⁸ Locally, owner-occupied homes are more common in the county than in the city, 58.4% versus 47.9%.³⁹

Renting Versus Buying

The number of new households is increasing faster than population growth and trending toward smaller individual households, especially in the rental market. The rental market is growing, in part due to home prices increasing twice as fast as incomes and the quick recovery of multi-family units after the recession. According to the 2017 Emerging Trends in Real Estate report, a large number of millennials entering the workforce buoys the rental market. Other factors contributing to the strong rental market include general ownership wariness following the recession, credit issues including student debt and stricter mortgage financing requirements.⁴⁰

In the next ten years, young adults between the ages of 18 and 27 are expected to lead the creation of new households, although at a slower and more singular rate than their predecessors. Responses to the MOR Housing Survey revealed a trend of younger households facing more obstacles to ownership than older buyers, such as less developed credit history, fewer savings or equity and significant student loan debt.⁴¹

Nationally, rental vacancies have decreased from 9.5% in 2006 to 7.1%

in 2015 according to the U.S. Census Bureau. In Missoula, since 2012, the vacancy rate has been under 5% and 3% in 2017, making for a tight rental market and pointing to a need for additional rental housing stock.⁴² To provide some context to the need for rentals, in the City of Missoula projections show the need for 730 new rental housing units to keep up with short term demand, currently 500 of these 730 units are underway.⁴³

Key Considerations for the Land Use Map

Residential Land Use

- Accommodate for an adequate supply of housing to avoid the map itself becoming a constraint
- Allow for a wide variety of housing types and densities
- Allow the market to react to changing housing needs
- Plan for the extension of public water and sewer to support development needs

Considerations for the Land Use Map Update

Currently, affordable housing is the biggest land use issue Missoula is facing. It is a complex issue and the land use map alone will not solve it. However, if the land use map is developed without housing affordability in mind, it could make the affordability issue even more significant. It is important to understand the limitations of the land use map, including:

- The land use map cannot address the cost of raw materials;
- address state or federal policy;
- address labor shortages; and
- address the disparity between wages and housing prices.

The land use map can contribute to addressing issues with affordability by:

- Planning for ample supply of housing;
- planning for a range of housing types of in order to allow the market respond to changes; and
- planning for where housing will go in relation to existing and

planned infrastructure while balancing other community values and protecting the resources that make Missoula a great place to live.

Supply

Housing supply is an important factor effecting housing prices. The amount of developable land within the Planning Area is limited by geography. Constrained housing markets are at risk of becoming inelastic, when housing costs are more likely to go up and stay up than they are to go up and fall back down. In addition to geography, policy can also act as a constraint to housing. The land use map needs to accommodate an adequate supply of housing to avoid the map itself becoming a constraint.

According to the Montana Regional Multiple Listing Service, the share of home sales, no matter the type, shifted toward more expensive inventory between 2012 and 2017. The share of home sales above \$350,000 increased from 11% to 23% and the share of home sales under \$200,000 decreased from 45% to 16%.

Another aspect of housing supply that needs to be considered is the ability of people to change housing types at different stages of their lives. If there is not an adequate supply at one price point in the market, for renters or buyers, it might prevent people in lower price points wanting to move up, further driving up housing costs. While we may not need to prioritize half million-dollar homes, an inadequate supply in that price point can raise prices lower on down the real estate market.

Type

Housing supply must come in different forms: the type of housing our community needs and type of housing people prefer. These needs and preferences evolve over time. The land use map should accommodate a wide variety of housing types in order to allow markets to react to changing community needs and buyer preferences.

In current conditions, new single-family construction, even at a 5,000 square foot lot size, is not affordable for a Missoula family earning the median household income. In the urbanized area, single family homes at prices less than \$200,000 have become almost non-existent, making up 41% of home sales in 2012 and down to 8% in 2017⁴⁴. Multi-family units, including condos and townhomes, are part of the solution to provide housing that meets our community needs. Between 2015 and 2017, condos and townhouses have similarly become more expensive, with 28% selling for more than \$200,000 in 2015, increasing to 52% in 2017⁴⁵. In

the county, the areas with the type of infrastructure necessary to support higher density housing are limited. The land use map may need to plan for areas of housing ahead of where there is already infrastructure, setting the stage for where infrastructure improvements occur.

The land use map update must also consider housing preference. While our community must build specific housing types to meet our housing needs, the majority of Missoulians still prefer to live in a single-family residence. If the land use map does not offer a range of housing types that allow for a range of preference, some people will look for their preferred housing type outside of the Missoula market, trading in a Missoula location for longer commutes and housing options they want at prices they can afford.

Relation to Existing and Planned Infrastructure

To meet our projected housing demands and address current issues of housing affordability, development will need to occur at densities supported by public water and public sewer. There are limited sites within the Planning Area that have both water and sewer available. In areas with water and sewer service, housing will be competing with commercial and industrial uses. It may be necessary to identify potential areas for housing development without existing infrastructure to help service providers and local government plan for future extensions. Collaboration and coordination between the city and county will be crucial to planning efforts that address affordable housing. This is especially true if the results include incentives that increase regulatory predictability across jurisdictions and an annexation policy that identifies developable land with appropriate infrastructure while aligning zoning categories between the city and county, as recommended in the Missoula Organization of Realtors 2018 report “Making Missoula Home: A Path to Attainable Housing”.

Since 1975, development in Missoula County has been guided by a number of county-wide and topic- or community-specific documents, including growth policies, comprehensive plans, area plans and issue plans. The following policy review inventories the land use designations and policies that influence decision making within the Planning Area.

Chapter Five: Adopted Land Use Policies



MISSOULA COUNTY GROWTH POLICY, 2016

The 2016 Growth Policy is the most recent plan adopted by Missoula County. It addresses the entire county outside the Missoula city limits and is organized around the themes of landscapes, livelihoods and communities. The Missoula County Land Use Designation Map, or Map 18 in the Growth Policy, incorporates 54 land use designations from previously adopted comprehensive plans and area plans, with some designations dating back to 1975. There are 29 residential designations, 12 commercial designations, and nine resource, park, and/or open space designations. Designations were neither established nor eliminated in this 2016 policy.

The 2016 Growth Policy specifies a number of goals, objectives and actions, including the high priority to implement a land use strategy and update land use designations. Such an update will help to achieve seven of the 16 Growth Policy Goals.

Goal #1: Conserve natural resources

Goal #4: Reduce Missoula County's contribution to climate change

Goal #7: Sustain and promoting land- and resource-based industries

Goal #8: Provide for the logical growth of communities while protecting rural character and

sustaining county resources

Goal #9: Support the provision of infrastructure and services

Goal #10: Provide opportunities for housing choices

Goal #11: Reduce safety risks and costs associated with wildland fire and other hazards

The plan includes a Land Use Designation Map that provides guidance for development patterns, public infrastructure and local services (Map 18 in the Growth Policy). Zoning is considered an implementation tool, one that will be dependent on an update to the land use map. This project is following the implementation steps outlined by the Growth Policy for that implementation. A draft Planning Area boundary is presented in this profile based on recommendations from the County Growth Policy to include areas experiencing growth and development pressures, where existing designations are outdated and/or where there is significant community interest.

OUR MISSOULA - CITY OF MISSOULA GROWTH POLICY, 2015

In 2015, the City of Missoula adopted the Our Missoula City Growth Policy, 2035. This policy provides direction for new development and sets a vision to sustain and enhance a successful community. It updates past land use designations and the Future Land Use Map, grouping 20 designations into five categories: Mixed-Use (3), Employment-Based (3), Residential (5), Special Purpose (3) and Overlay (6). The designations within these categories recommend a greater development potential than current zoning allows, 38,000 new dwelling units compared to the 25,000 permitted in zoning. The “focus inward” approach encourages new growth in the direction of existing infrastructure, neighborhoods and public services. Implementation of the Our Missoula plan includes zoning regulations as the primary tool, assisted by subdivision regulations and a Capital Improvement Program (CIP) to acquire, replace and maintain public infrastructure and other major city assets.

The Future Land Use Designation Map uses the Urban Service Area as its boundary, the same boundary used throughout the Urban Fringe Development Area (UFDA) Project. It includes areas adjacent to the city limits, extending from The Wye to Bonner and northern Grant Creek to Lower Miller Creek. While the map extends beyond the city limits into the county, the city does not have jurisdiction in the county unless those areas are annexed. The importance of the City of Missoula’s growth policy to the county’s land use mapping process lies in the inherent partnership between the city and county to manage growth in the greater Missoula community. The city’s focus inward vision is an important consideration for how the county manages the surrounding areas.

Urban Fringe Development Area Project, 2008 - UFDA Yearbooks: 2008, 2009, 2010, 2012, 2013-14, 2015

This project amends the 2005 Missoula County Growth Policy and provides a regional context for residential growth within the Urban Service Area, focusing on the projected need for 15,000 new residential units within the Urban Service Area by 2030. The Urban Service Area boundary contains 33,080 acres and uses the same boundary as the Missoula City Wastewater Service Area, covering the City of Missoula and adjacent unincorporated Missoula County land. Stated methods for implementation of the UFDA Project include public infrastructure investments, neighborhood plans, annexation discussions and development proposals.

A suitability analysis of residential development was produced by the (former) Office of Planning and Grants. The suitability criteria included access to Mountain Water, City Sewer, Transit and Bike Routes; City Fire Travel Response Time; Prime Soils and Open Space; Sensitive Lands and Key Wildlife Habitat; and Constrained Lands. This analysis helped to identify areas most appropriate for residential development and to allocate residential development to specific neighborhoods within the Urban Service Area.

Central Missoula was allocated the most residential growth with 2,595 units, followed by East Mullan (2,500), Reserve to Russell Corridor (2,400), The Wye (2,281) and Brooks Corridor (2,154) rounding out the last area allocated more than 2,000 units. These allocations emphasize central and western Missoula while leapfrogging over West Mullan and deemphasizing the Rattlesnake, University, Grant Creek as areas for residential growth.

An UFDA Yearbook has been published between 2008 and 2015. They contain map updates of development and infrastructure projects to track residential growth, i.e. location on approved subdivisions, new permitted dwelling units, new bike lanes and sewer extensions. Comparing the 2008 residential allocations to 2015 build-out data, the Reserve to Russell Corridor saw the most residential development with 763 new units since 2008, followed by East Mullan (679), Brooks Corridor (393) and Central (381). The Wye only saw 25 new units. Seven years into the 22 year projection, more than 3,000 of the original 15,000 units have been built. In other words, 80% of the allocated development would have to occur in the 15 years following 2015 to satisfy the 2030 projection.

AREA PLANS

The following plans cover land that falls within the draft Planning Area Profile boundary, outside the city limits.

Target Range Plan, 2010

This plan updates land use designations in the Target Range neighborhood. It recommends the existing blanket designation of Residential two dwellings per acre be updated to incorporate two areas of Residential one dwelling per acre. It also recommends voluntary methods for preserving the rural character within the plan boundaries, including conservation easements and transfers of development rights. The plan makes a strong effort to incorporate the 1,000 new housing units allocated to this area from the UFDA project, while recommending zoning changes that

decrease some portions from two dwellings per acre to one dwelling per acre, mirroring the updated land use designations within the plan. It also encourages the use of transportation alternatives to offset potential negative impacts associated with future development.

2005 Wye-Mullan West Plan Area

Land use designations were updated with this plan based on several land capability factors, including resource constraints and health regulations, community input, existing comprehensive plan designations and zoning, existing land uses and development patterns and existing or potential infrastructure improvements.

2002 Missoula County Regional Land Use Guide

No new land use designations or objectives come from this plan, instead they were incorporated verbatim from the 1975 Plan. This plan covers areas not covered under a regional plan adopted after 1975.

2000 Northside/Westside Plan

While this plan updates land use designations, only a small portion of the Planning Area is outside the city limits. Those areas are designated Heavy Industrial and Light Industrial and located in the northwest portion of the plan boundary.

2000 Southside Riverfront Plan

Three small portions within this Planning Area are outside the city limits and are designated either Commercial/Residential Mixed Use or School Site.

1998 Urban Comprehensive Plan

This plan updates land use designations and compares existing conditions to those in the 1975 Comprehensive Plan. Similar to the 2002 Regional Land Use Guide, land use designations from this plan remain the current designation for portions of the county that have not adopted an area plan for their community, including East Missoula, Bonner/Milltown and portions of western Missoula. The plan recommends an adequate supply and variety of housing be developed to manage growth and that areas appropriate for urban growth are those with available or planned extensions of urban services, including public safety, culture, social, health and transportation.

1997 Butler Creek Area Plan

Land use designations are not updated with this plan; the designations of Open and Resource and 1 dwelling per 5-10 acres are held over from the 1990 Urban Comprehensive Plan Update. Given the relatively undeveloped nature of the study area, the plan recognizes the opportunity for a transition between limited development and the natural landscape that takes into account soils, slope, geology, water resources and wildlife habitat. The plan encourages affordable housing, maintaining rural character, establishing proper densities given the overall carrying capacity of the sites, developing community water and sewer systems and clustering homes.

1997 Miller Creek Area Comprehensive Plan

New land use designations are mapped in this plan but are not always described within the plan. They include Highway/Heavy Commercial; Neighborhood Commercial; Public & Quasi-public Lands; Urban Suburban (6 dwellings per acre; 4 dwellings per acre; 2 dwellings per acre; 1 dwelling per acre); Rural/Low Density Suburban (1 dwelling per 5 acres); Rural Medium Density Residential; Residential Rural Cluster; Existing Park; Potential Park; Rural/Natural Resource and Agricultural Land; Floodway; 100 Year Floodplain/Parks and Open Space; Open and Resource Lands.

Land use goals from this neighborhood plan include preserving the rural character of the Miller Creek area by allowing clustering; designating areas for convenience centers; developing performance standards for architecture, landscaping, buffer zones, scale and neighborhood compatibility; limiting uses to neighborhood services; and having new development provide a transition area to existing large lots.

1995 Airport Development Park Plan

Land use designations are mapped in this plan and developed as a Land Use Program. The Program is based on a market and economic analysis of the Missoula area and community input. Of the 446 acres contained within the plan boundaries, 82 are classified as Reserve Areas, 71 as Light Industrial, 56 as Industrial/Warehouse and 43 as University Affiliated Business and Technology Park. The remaining acreage is divided between Signature Office/Retail, Retail Center, Office/Hotel, Office/Research and Development, Technical Training Center, Research and Development, Parks, Trails and Open Space and Street Right-of-Way.

1995 County Reserve Street Plan Area

This plan is accompanied by a map of land use designations. The western portion of the plan boundary is within the county, while the eastern portion is in the city. As such, the plan is a joint city-county effort to coordinate decision making for the five to ten years following adoption. Most of the county area within this plan is designated Residential 4 dwellings per acre. Smaller areas are designated Residential 6 dwellings per acre and Special District Commercial Corridors and Intersections. The following corridors are identified for development: Reserve Street, South 3rd Street West, South Avenue, the area north of South 3rd Street West and east of Curtis Street and the area north of South Avenue along Johnson Street.

1995 Rattlesnake Valley Plan

This plan has associated land use designations and is largely made up of city land with a plan boundary that follows that of the Rattlesnake Creek Watershed. Of the county land included, one northern portion is designated one dwelling per acre. Other scattered parcels along the eastern side of the valley are designated Residential 4 dwellings per acre or Residential 1 dwelling per 5-10 acres. The remaining county portion is designated Open and Resource.

The section on Land Use is largely an account of existing conditions with some forward thinking about the build-out of recently approved subdivisions. The plan carries over goals identified in a variety of documents, including the 1988 Rattlesnake Valley Comprehensive Plan Amendment, Missoula Urban Comprehensive Plan and the working document Planning for Growth in Missoula County. These goals center around topics including air and water quality, open space and natural resources, transportation, neighborhood character and quality of life.

1986/1987 South Hills Comprehensive Plan

This plan, which has approximately half of its area in the county, recommends six land use designations. The designations include Residential 4 dwellings per acre, Residential 1 dwelling per acre, 1 dwelling per 40 acres, Open Space and Public Walkways. The plan includes two county-related land use recommendations: rezoning the South Hills study area to fit the 1975 Comprehensive Land Use plan as amended in this document and amending local zoning codes to provide specific criteria for development on slopes in excess of 10%.

1980 Grant Creek Area Plan

This plan recommends 12 land use designations and aims to provide a pattern for development with strong considerations for social interaction, energy conservation, sense of community, economic efficiency and effective use of public facilities and services. The plan envisions two self-sufficient districts, each having 1,000-2,000 dwellings and populations between 2,500 and 6,000 with their own elementary school, parks and commercial centers.

1979 Wye/O'Keefe Creek Plan

This plan recommends six land use designations, including Rural Residential (1 dwelling per 10 or more acres); Suburban Residential (parcels less than 10 acres); Highway Commercial; Agricultural; and Grazing. Land use goals and objectives from this plan include reducing conflicts between land use activities; promoting landscaping that enhances visual amenities, soils, air and water quality, wildlife and other environmental features; clustering low density residential developments to allow agricultural land to remain in production and enhance the rural character; encouraging neighborhood commercial establishments near the population concentrations; and making the public aware of the social costs of a significant economic development before it is undertaken. The plan recommends avoiding haphazard development patterns by building where infrastructure exists and against increasing the amount of land designated residential.

1993 Fort Missoula Plan

This plan is an update to the 1973 Fort Missoula Plan and enlarges the previous plan's boundary. The plan envisions developing two or three major commercial centers and convenience retail close to neighborhoods and preserving the historical heritage of Fort Missoula. It is recommended that industrial activities be situated so they do not interfere with commercial and residential uses.

ISSUE PLANS

2017 Activate Missoula 2045

This long range transportation plan addresses all modes of travel and seeks to support implementation of Missoula's policies related to growth and development, environmental protection, economic development,

neighborhood preservation and community health. It is meant to coordinate the many transportation projects and programs carried out by transportation partners and agencies across the region. The seven goals from the 2012 Long Range Transportation Plan Update are carried forward in this update with the addition of an eighth goal:

1. Maintain our existing transportation system
2. Improve the efficiency, performance and connectivity of a balanced transportation system
3. Maximize the cost effectiveness of transportation
4. Promote consistency between land use and transportation plans to enhance mobility and accessibility
5. Provide safe and secure transportation
6. Support economic vitality
7. Protect the environment and conserve resources
8. Promote community health and social equity through the transportation system

2015 Missoula County Industrial Lands Study

This study inventories and evaluates the quantity and quality of Missoula County's industrial lands. It found that there are 3,773.53 acres of land zoned either Light Industrial or Heavy Industrial within the county, excluding land within the city limits. This amount of land is expected to last 50 years, although much of it requires further infrastructure improvement. Limitations to industrial development include: contamination; lack of access to transportation, broadband and public sewer; regulations; and real estate costs. The study found that Bonner and Frenchtown Mill are the two areas most ready for build out of large scale heavy industrial uses. The Wye has potential for increased light industrial use but would benefit from water and road improvements. The plan recommends: building out sites with adequate infrastructure prior to extending new services; clustering related businesses; and developing criteria for site certification to assess industrial site readiness.

2012 Missoula County Parks and Trails Master Plan

The Missoula County Parks and Trails Master Plan was adopted in 2012. The plan recommends using subdivision regulations to improve the qual-

ity of dedicated park land, expand the program's ability to pursue trail development and strengthen and develop new partnerships to enhance the program's inventory of 91 parks and 45 miles of trails.

2006 Missoula Urban Area Open Space Plan Update

This plan addresses the need for a dynamic, integrated open space system with improved linkages, more spaces to meet new or unmet needs and protection of the natural assets and environmental base of the open space system. The plan calls for expanding the open space system through land acquisition and conservation easements, while keeping in mind the need for a network of open lands, trails and bike paths to better access existing and new open spaces and walking, hiking and biking paths. This plan is currently being updated.

2004 Parks and Recreation Plan for the Greater Missoula Area

This plan is a guide for land use as it relates to parks, trails, open spaces, conservation lands, the urban forest, recreation facilities and opportunities in the Missoula urban area. It considers the increased need for parkland as the population grows and emphasized easy and equitable access to parks and recreation facilities while acknowledging that public and green infrastructure enhance community livability.

Appendix A: Existing Land Use Designations

Land Use Designations

	ADP-Light Industrial and Commercial
	Cluster 1 dwelling unit per acre
	Cluster 2 dwelling units per acre
	Community and Highway/Heavy Commercial
	Community Commercial
	General Commercial
	Highway/Heavy Commercial
	Neighborhood Commercial
	Special District Commercial
	Floodway
	Heavy Industrial
	Light Industrial
	Light Industrial and Commercial
	Mixed-Use 4 dwelling units per acre
	Mixed-Use 16 dwelling units per acre
	Neighborhood Center
	Open and Resource
	Existing Park
	Parks and Open Space
	Public and Quasi-public Lands and Facilities
	School/Park
	1 dwelling unit per 2 acres
	1 dwelling unit per 5-10 acres
	1 dwelling unit per 5 acres
	1 dwelling unit per 10 acres
	1 dwelling unit per 20 acres
	1 dwelling unit per acre
	2 dwelling units per acre
	4 dwelling units per acre
	6-8 dwelling units per acre
	6 dwelling units per acre
	8 dwelling units per acre
	16 dwelling units per acre
	25 dwelling units per acre
	Rural Cluster

Land Use Designation	Acres
ADP-Light Industrial and Commercial	400.98
Cluster 1 dwelling unit per acre	1,391.74
Cluster 2 dwelling unit per acre	205.13
Community and Highway/Heavy Commercial	0.07
Community Commercial	150.83
General Commercial	10.70
Highway/Heavy Commercial	115.87
Neighborhood Commercial	19.86
Special District Commercial	18.97
Floodway	567.36
Heavy Industrial	1,271.65
Light Industrial	3,349.41
Light Industrial and Commercial	815.81
Mixed-Use 4 dwelling units per acre	19.24
Mixed-Use 16 dwelling units per acre	166.25
Mixed-Use	30.30
Neighborhood Center	17.10
Open and Resource	96,393.77
Existing Park	40.41
Parks and Open Space	29,803.22
Public and Quasi-Public Lands and Facilities	2,304.03
School/Park	24.10
1 dwelling unit per 2 acres	1.93
1 dwelling unit per 5-10 acres	4,269.83
1 dwelling unit per 5 acres	4,066.84
1 dwelling unit per 10 acres	354.33
1 dwelling unit per 20 acres	822.76
1 dwelling unit per acre	1,997.42
2 dwelling units per acre	4,465.06
4 dwelling units per acre	1,064.67
6-8 dwelling units per acre	0.39
6 dwelling units per acre	897.55
8 dwelling units per acre	156.45
16 dwelling units per acre	218.73
25 dwelling units per acre	112.65
Rural Cluster	13.08

Appendix B: Map Notes and Citations

CARTOGRAPHIC STANDARDS

The maps in this report provide a graphic representation of the existing conditions within the proposed planning area for general reference purposes. All boundaries or property boundaries shown are approximate and are not appropriate for making decisions or inferences about individual properties, homes, or businesses.

COMMON DATA NOTES FOR ALL MAPS

The following base layers are shown on all maps:

The proposed planning area boundary (2018)

Major Roads and Highways (2018)

Major Waterways (2000)

City of Missoula Limits (2018)

These layers are created and maintained by GIS staff in either Missoula County's GIS Division or Community and Planning Services.

INDIVIDUAL MAP NOTES

This section discusses other layers shown on individual maps. These layers may rely on data obtained from other sources and may have other limitations. These sources and limits will be specified in the notes for each map and in the bibliography at the end.

Figure 1 – County Reference Map

This map displays the proposed planning area within the context of Missoula County. The county boundary layer (2018) is maintained by Missoula County's GIS division.

Figure 2 – Urban Area Plans and Part II County Zoning

This map displays the boundaries of existing urban area plans identified in Map 6 of the Missoula County Growth Policy (2016) and areas zoned under Part II of the Missoula County Zoning Regulations (2017). These map layers are maintained by Missoula County Community and Planning Services.

Figure 3 – Potential Development Constraints

This map displays land that is subject to development constraints within

the report's study area. Specific constraints shown include the regulatory floodplain (100-year and 500-year floodways), slopes steeper than 25%, wetland areas, conservation easements, and federal, state, and local government lands. Missoula County maintains the floodplain layer (2018) using information from the FEMA Flood Map Service Center (Federal Emergency Management Agency) and the conservation easement (2018) and land ownership layer (2018) using cadastral mapping information from the Montana State Library (2018) and the Montana Department of Revenue. Wetland data comes from the Montana Natural Heritage Program (2017) and elevation data comes from the US Geological Survey (U.S. Geological Survey, 2013).

Figure 4 – Water and Wastewater Service Areas

This map displays the service areas for the Target Range Sewer District and the municipal water and wastewater systems within the report's study area. Missoula County maintains the Target Range Sewer District (2016), while the municipal water (2017) and wastewater (2017) layers are used by permission from Missoula Water and the City of Missoula.

Figure 5 – Motorized Transportation Network

This map displays the road transportation system used by motorized vehicles within the report's study area. It displays freeways (Interstate 90), federal and state highways, and collector roads (major roads) using information maintained by Missoula County (2018).

Figure 6 – Non-Motorized Transportation Network

This map displays the transportation systems used by pedestrians, bicyclists, and other non-motorized vehicles. It includes the Mountain Line transit routes (2015) and non-motorized shared-use primary and secondary trails. The road system (2018) is included for reference but may display roads not suitable for non-motorized use. The non-motorized trails include a subset of data from a joint Missoula County/City of Missoula trails database (2017) maintained by Missoula County Community and Planning Services. While the trail locations shown on the map are current as of the publication date, ground conditions may be different than shown on the map.

Figure 7 - Broadband Internet Services Providers

This map displays a visual summary of the areas served by broadband internet service providers within the report's study area. The broadband internet provider was obtained from the National Broadband Mapping

Program (Federal Communications Commission, 2014) and includes both business and residential providers offering both fixed and wireless internet services. The map was made by overlaying the service area boundaries for each provider on top of tax parcel boundaries (Missoula County GIS Division, 2018) and counting how many service areas served each tax parcel, without regard to service type or technology. Thus, this map does not guarantee that all customers at a given location can obtain internet service appropriate for their needs.

Figure 8 - Community and Emergency Services

This map displays community and emergency services available to Missoula County residents located within the report's study area. Specific community services shown include government centers, public schools and universities, post offices, hospitals, and rural community centers. Rural community centers are buildings or other locations where the residents of a rural community gather for meetings, community events, etc. Specific emergency services shown include the City of Missoula Police Department, Missoula County Sheriff, Montana Highway Patrol's District 1 Patrol office, and fire stations operated by various departments. Missoula County's GIS Division (2018) maintains this information except for the rural community centers, which is maintained by Missoula County Community and Planning Services as part of the PLACE Project (2018)

Figure 9 - Public Land Ownership

This map displays land owned by federal, state, or local government agencies and The Nature Conservancy within the report's study area. The land ownership layer (2018) is maintained by Missoula County using cadastral mapping information from the Montana State Library (2018) and the Montana Department of Revenue.

Figure 10 – Recreation Facilities

This map displays selected recreational facilities available to Missoula County residents within the report's study area. Specific amenities shown include federal recreation (US Forest Service - Lolo National Forest, 2003) and wilderness areas (Montana Natural Heritage Program, 2003), federal recreation sites (U.S. Forest Service - Lolo National Forest, 2009). Missoula County parks (2018), Montana Fish and Wildlife sites with fishing and boat access (Montana Fish, Wildlife, and Parks, 2018), City of Missoula conservation lands (2017), other publicly owned lands, and non-motorized trails.

The land ownership layer (2018) is maintained by Missoula County using cadastral mapping information from the Montana State Library (2018)

and the Montana Department of Revenue.

The non-motorized trails are obtained from a joint Missoula County/City of Missoula trails database (2017) maintained by Missoula County Community and Planning Services that includes local, state, and federal government trails and limited trail information from private landowners (i.e. homeowners associations). While the local government trail locations shown on the map are current as of the publication date, data from other providers may have changed and ground conditions may be different than shown on the map.

Figure 11 - Soils of Farmland Importance

This map displays soils of importance to agricultural operations within the report's study area as determined by soil scientists (Soil Survey Staff, Natural Resources Conservation Service, United State Department of Agriculture, 2017). The soils data is available at <https://websoilsurvey.sc.egov.usda.gov/>.

Dots on the map represent identify privately-owned tax parcels with at least 0.01 acres used for agricultural activity and that contains agricultural land uses as determined by the Montana Department of Revenue (DOR). DOR staff identifies and classifies agricultural land uses using aerial imagery and identifies the number of acres on each tax parcel used for agricultural activity during annual property tax assessments. This map uses 2017 tax assessment data and 2015 land classification data from the Montana State Library to identify the locations of the dots shown on the map.

Figure 12 – Wildlife Habitat and Key Natural Resources

This map displays natural resource habitats for predominant wildlife and plant species within the report's study area as determined by Missoula County Community and Planning Services natural resource staff. Wetland data is provided by the Montana Natural Heritage Program (2017). Important Bird Areas data is provided by the Montana Audubon Society (2015). Data for the remaining species is provided by Montana Fish, Wildlife, and Parks (2018), except for the bull trout and westslope cutthroat trout, which were last updated in 2010.

Figure 13– Existing Land Use Designations and Legend (Appendix B)

This map displays existing land use designations within the report's study area as shown on Map 18 of the Missoula County Growth Policy (2016). Please note that not all land use designations shown on Map 18 are located within the report's study area and are consequently omitted from

Figure 13 and Appendix B.

Figure 14 – Existing Missoula County Zoning Districts

This map displays Missoula County zoning districts in areas zoned under Part II of the Missoula County Zoning Regulations (2017). Please note that the seven categories of zoning districts shown on the map have been simplified for this report and do not reflect the full variety of permitted uses allowed under the full zoning regulations. For example, areas zoned as Agricultural on this map also may be also used for forestry and limited residential uses.

Figure 15 – Taxable Value Per Acre

This map displays an estimate of the taxable value per acre as determined by Missoula Community and Planning Services staff using 2017 property tax assessment information obtained from the Montana Department of Revenue and 2017 tax parcel data maintained by Missoula County's GIS division.

Figure 16 – City of Missoula Annexations since 2010

This map displays the current City of Missoula's annexation boundary and highlights individual areas that have been annexed by the City of Missoula since 2010 using annexation information provided by Missoula County's GIS Division and the City of Missoula.

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