

**Park County, MT
Growth Policy Update
Existing Conditions Report
May, 2016**



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Overview

Park County—2,814 square miles of dramatic mountains and scenic valleys – includes the highest point in Montana (Granite Peak), and the original and only year-round gateway to Yellowstone National Park, the world’s first national park. The Custer-Gallatin National Forest provides a haven for wildlife and outdoor recreation pursuits, and the Yellowstone River – the longest undammed river in the lower 48 states – winds its way through much of the County, providing additional water and recreation opportunities. Working farms and ranches dominate the rural landscapes and continue to be an important way of life for many County residents.

Population

As of 2014 the population of Park County was estimated at 15,642, a slight increase since 2010 when the population stood at 15,636. Over time, Park County’s population has remained steady, increasing by 8% between 1990 and 2000 and decreasing by 0.3% between 2000 and 2014 – see Figure 1.

Geographic Distribution

An estimated 45% of Park County’s population lives in the county seat of Livingston – see Table 1. When considering Livingston and the roughly four-mile surrounding area, that number jumps to approximately 62%. Outside of the Livingston area, the population of Park County is spread throughout the county primarily in the Paradise and Shields Valleys.

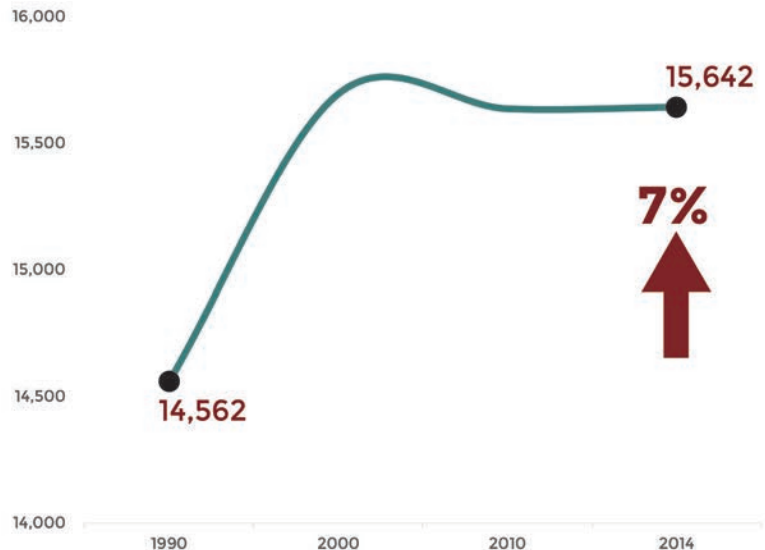
Age Distribution

As of 2014, the 45-64 age group made up the largest share of Park County’s population at 34%, followed by the 18-44 group (29%), under 18 (19%) and

Map 1 - Park County Base Map



Figure 1 - Population Change 1990 - 2014

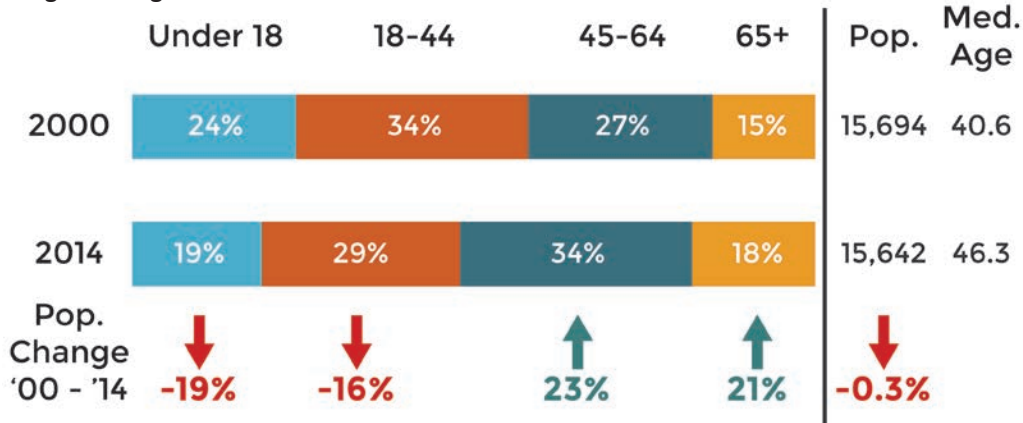


65+ (18%). As shown in Figure 2, this represents changes since 2000, with decreases in the under 18 and 18-44 age groups and increases in the 45-64 and 65+ age groups. The increase in individuals aged 45-64 is notable because in 20 years all of these individuals will be at or near retirement age and will likely have different needs in terms of housing, mobility, and healthcare. During this same time period, the median age in Park County increased from 40.6 to 46.3. Taken together, these figures point to a population that is growing older with a decreasing share of school-aged children.

Table 1 - Geographic Population Distribution

Area of Residence	% Of County
Livingston	45%
Gardiner	8%
Pray	4%
Emigrant	2%
Clyde Park	2%
Wilsall	1%
Springdale	1%
Cooke City	0.1%
Silver Gate	0.1%
Other	25%

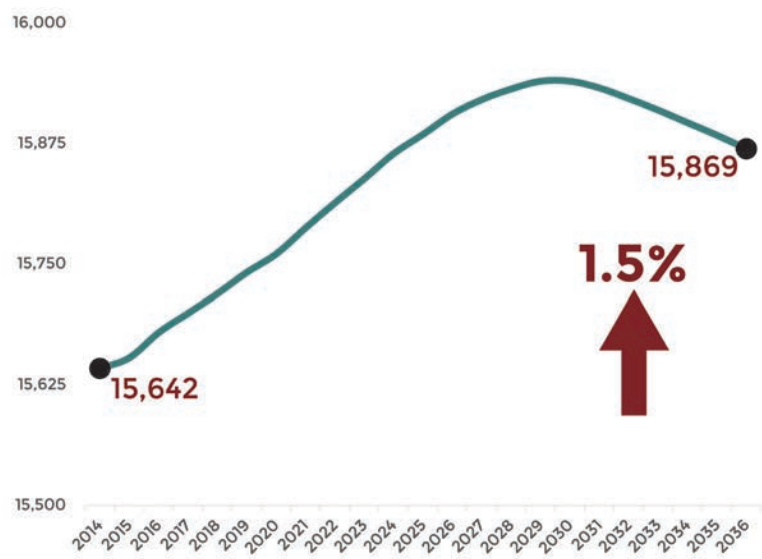
Figure 2 - Age Distribution 2000 & 2014



Projections

The state of Montana’s Census and Economic Information Center (CEIC) provides county level population projections, produced by Regional Economic Models, Inc. Projecting 20 years into the future, CEIC estimates Park County’s overall population to remain on a similar trend of slight growth, with a 1.5% increase projected between 2014 and 2036 – see Figure 3. In terms of growth within different age groups, Park County’s senior population (age 65+) is projected to see the largest increase by 2036 at 55%, followed by the 20-44 age group which is projected to grow by 6%. Both the under 20 and 45-64 age groups are projected to decrease

Figure 3 - Population Projections 2014 - 2036



over the next 20 years by 5% and 26%, respectively – see Figure 4. These projections show a continuation of the aging trend Park County has experienced since 2000. Predictably, more senior friendly housing, transportation options, and medical services will be needed to accommodate an aging population.

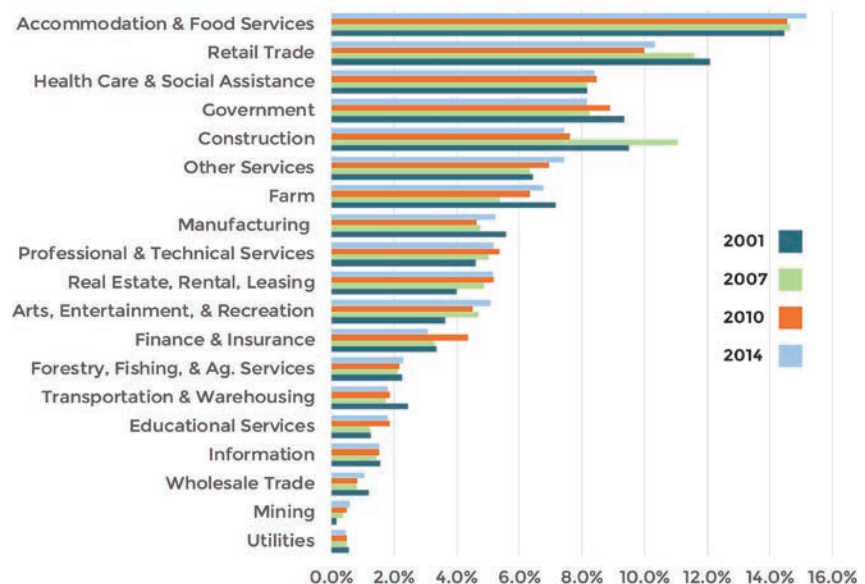
Figure 4 - Current and Projected Age Distribution



Economy

The majority of jobs in Park County are concentrated in several unique population centers including; Livingston, Clyde Park, Cooke City & Silver Gate, Emigrant & Pray, Gardiner, and Wilsall. Each of these communities shares the independent, resilient spirit embodied by Park County and have local economies sustained by a diverse array of commercial and industrial businesses and agricultural activities. That being said, the unique nature of each community is tied to their geographic location. This is demonstrated by the fact that communities like Wilsall and Clyde Park, in the Shields Valley, are more reliant on agriculture whereas communities that flank Yellowstone National Park such as Cooke City and Gardiner lean heavily on tourism, entertainment, food services, and retail. The community of Livingston is also home to many service sector jobs and houses a large portion of the County’s industrial jobs, with a working railyard and several large manufacturers.

Figure 5 - Employment Share By Industry



Employment

Between 2001 and 2014, the total number of jobs in Park County increased by 7%. As of 2014, the industry sectors employing the most people in Park County were accommodation and food services, retail trade, and healthcare and social assistance, accounting for 15%, 10%, and 8%, respectively, of all jobs in the County – see Figure 5.

When analyzing employment trends in Park County it is helpful to refer to the recent past and the impacts of the national recession. Since 2001 Park County, much like the rest of the United States, has experienced the volatility of a turbulent economy. Park County benefited from a strong economic climate in the early part of the century followed by the ‘great recession’ and subsequent moderate economic growth.

The Good Years – 2001-2007

Between 2001 and 2007 (the year of peak employment), Park County saw substantial economic growth. During this six-year period total employment increased by 15%, per capita income¹ increased by 40%, and annual average earnings² increased by 24% - see Table 2. By 2007, Park County’s unemployment rate was down to 3.5% compared to 4.4% for the State of Montana. Much of Park County’s economic growth during this period was fueled by new home construction, evidenced by the fact that construction employment increased by 34% (from 838 to 1,121 jobs) and employment in real estate, rental, and leasing increased by 40% (from 352 to 493 jobs) – see Figure 6. Other industries with high employment growth during this period were arts, entertainment, and recreation (+49%) and professional and technical services (+26%).

Table 2 - Economic Indicators

	2001	2007	2010	2014
Total Employment	8,819	10,133	9,231	9,445
Per Capita Income	\$23,213	\$32,450	\$33,014	\$40,614
Annual Avg. Earnings	\$20,590	\$25,605	\$26,003	\$29,384
Unemployment	4.7%	3.5%	8.8%	5.6%

Figure 6 - Employment Change by Industry 2001 - 2007

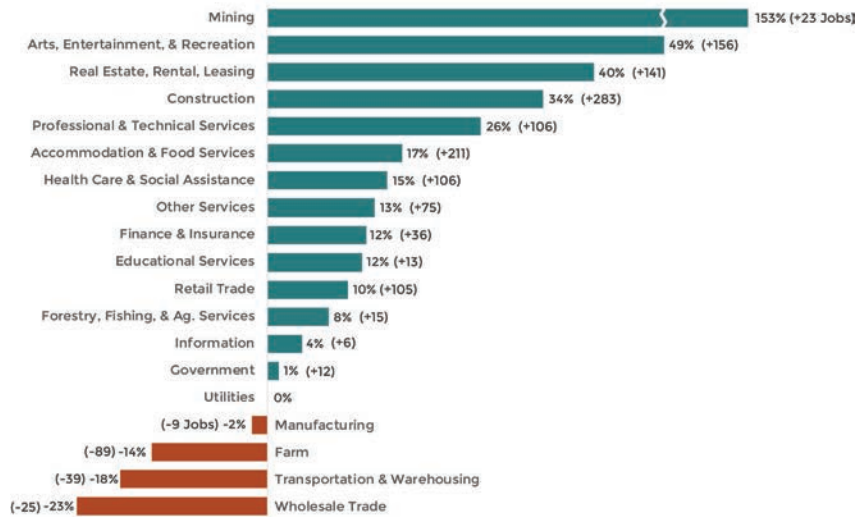
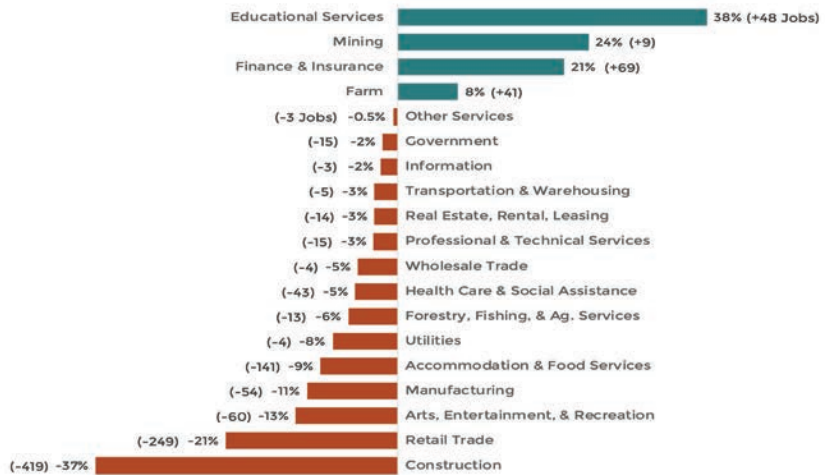


Figure 7 - Employment Change by Industry 2007 - 2010



1 Per capita income equals the total income for the county divided by the total county population. Total income includes income from wages as well as non-labor income.

2 Earnings are the sum of wages, benefits, and proprietors’ income. Average earnings equals total earnings divided by total full-time and part-time employment

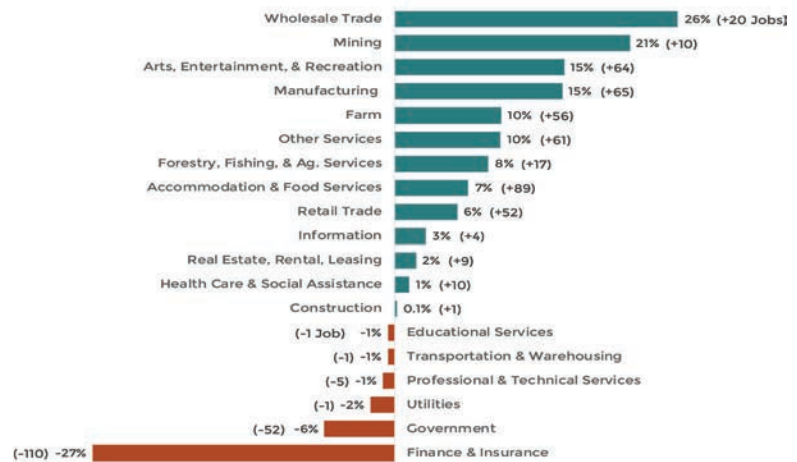
The Bottom – 2007-2010

During 2007, the economic climate in Park County began to shift, reflecting impacts of the great recession. Between 2007 and 2010 (the year of lowest employment), total employment in Park County decreased by 9%, per capita income only increased by 2%, and annual average earnings increased by just 2%. Several industry sectors saw employment decreases during this time. Employment in the construction industry decreased by 37%; retail trade by 21%; and arts, entertainment, and recreation by 13% - see Figure 7. At the other end of the spectrum, several industries saw increases in employment during this time including, educational services (+38%) and finance and insurance (+21%). Mining also saw a large percentage increase in employment, though the nominal increase was small. In total, out of the 19 industry sectors analyzed, 15 experienced decreases in employment between 2007 and 2010. By 2010, Park County's unemployment rate was at a ten-year high of 8.8% compared to 7.3% for the state as a whole.

The Light at the End of the Tunnel – 2010 - Present

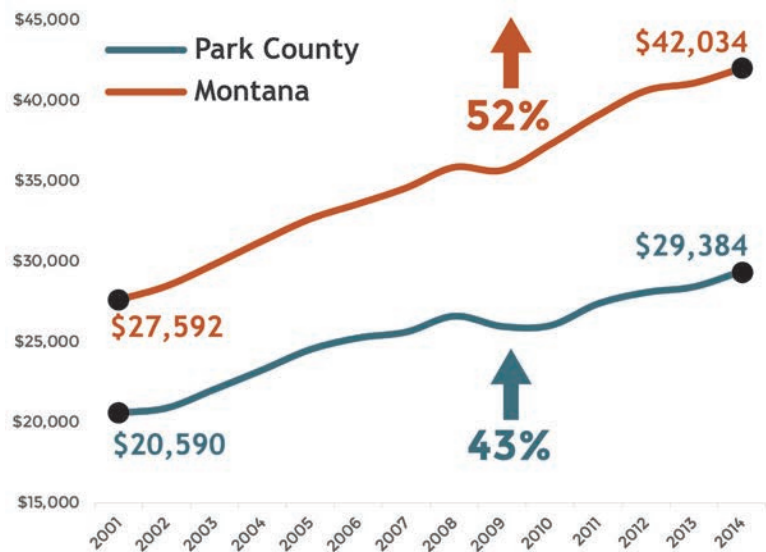
Since 2010, Park County has been slowly rebounding from the effects of the recession. Between 2010 and 2014, total employment in Park County increased by 2%, per capita income increased by 23%, and annual average earnings increased by 13%. While employment growth rates within individual industries are not as dramatic as they were pre-recession, 12 of the 19 analyzed industry sectors saw increases in employment between 2010 and 2014 – see Figure 8. The industries experiencing the highest percentage employment growth were wholesale trade (+26%); arts, entertainment, and recreation (+15%); and manufacturing (+15%). Once again, mining also saw a large percentage increase in employment during this time, though the nominal increase was small. Conversely, there were several industries that saw employment decreases during this time period, most notably the finance and insurance industry which saw a 27% decrease in employment between 2010 and 2014. Park County's rebound is further reflected when assessing the unemployment rate, which dropped to 5.6% by 2014.

Figure 8 - Employment Change by Industry 2010 - 2014



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Figure 9 - Change in Earnings 2001 - 2014

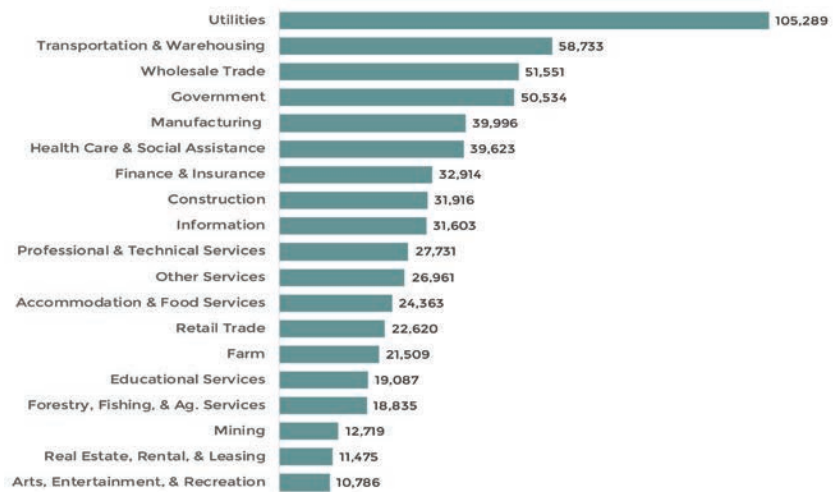


Earnings

Between 2001 and 2014 average annual earnings in Park County increased by 43%, compared to 52% for the State of Montana as a whole – see Figure 9. As might be expected,

earnings in Park County vary by industry. On average, earnings are higher in non-service related and government industry sectors in comparison to service related industries; however, the individual industries with the highest average earnings in 2014 happened to be service related industries – see Figure 10. All industry sectors analyzed experienced increases in earnings between 2001 and 2014 with the largest increases occurring in accommodation and food services, wholesale trade, and utilities – see Figure 11.

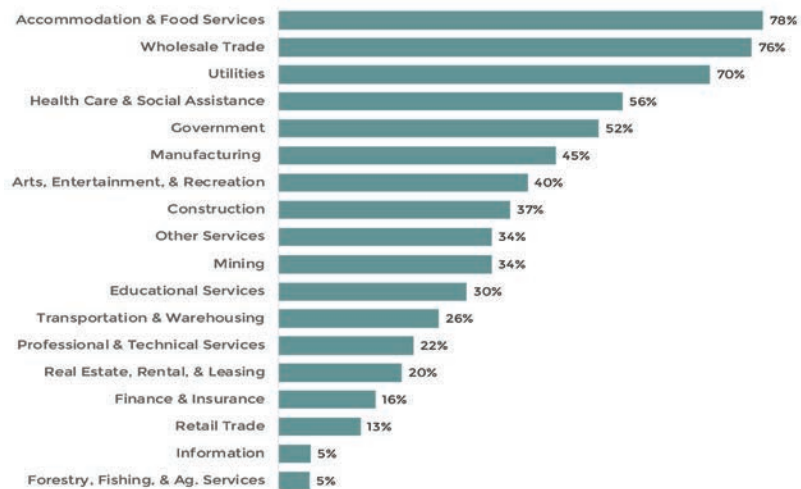
Figure 10 - Average Annual Earnings by Industry 2014



Labor Force Mobility

Park County’s neighbor to the west, Gallatin County, had an estimated population of 93,108 along with 73,109 total jobs in 2014. Given Park County’s proximity to this many people and jobs, it stands to reason that many Park County residents work in Gallatin and other nearby counties, and many of Park County’s jobs are filled by residents of these nearby counties. U.S. Census data show this to be true and highlight trends of an increasing number of jobs in Park County being filled by residents of neighboring counties and an increasing number of Park County workers traveling outside the county to find employment.

Figure 11 - Change in Average Annual Earnings by Industry 2001 - 2014



Trends by Place of Employment

In 2004, 84% of the jobs in Park County were filled by Park County residents and 16% were filled by residents of other counties, over half of which were filled by Gallatin County residents. By 2014 those figures shifted and 62% of the jobs in Park County were filled by Park County residents while 38% were filled by residents of other counties, nearly one third of which were filled by Gallatin County residents. This trend demonstrates that an increasing share of jobs in Park County are being filled by residents of neighboring counties.

Trends by Place of Residence

In 2004, 63% of employed Park County residents worked in Park County and 37% worked in other counties, over two-fifths of whom worked in Gallatin County. By 2014, these figures shifted so that 52% of employed Park County residents worked in Park County and 48% worked in other counties, close to half of whom worked in Gallatin County. This trend shows that an increasing share of Park County workers are seeking employment in nearby counties.

Housing

In 2014, there were an estimated 9,360 housing units in Park County, over one-third of which are located within the City of Livingston. The housing landscape in Park County is dominated by single-family housing (81% of all housing units) followed by multi-family housing (10%) and mobile homes (9%). Since 2000 there has been a trend towards more single-family housing units and fewer multi-family housing units and mobile homes – see Table 3.

As of 2014, 70%, or 6,539, of housing units in Park County were estimated to be occupied and 30% were vacant, representing a substantial increase in the number and percent share of vacant housing units since 2000 – see Table 4. Of the 6,539 occupied housing units, 75% were owner-occupied and 25% were renter-occupied, highlighting a trend of more owner-occupied and fewer renter-occupied housing units in Park County since 2000. This trend is further highlighted by the fact that the rental vacancy rate between 2000 and 2014 increased from 7.4% to 15.3%, while the for sale vacancy rate increased by just over one percentage point from 2.3% to 3.5%. One other interesting trend relates to the development of second homes in Park County. Between 2000 and 2014 the total number of housing units increased by 1,113 units, or 13%. Of the 1,113 increase in housing units during this time, an estimated 24% were for seasonal, recreational, or occasional use.

Housing Costs

The median housing value as of 2014 in Park County was \$210,100, which is substantially higher than the median housing value for Montana as a whole, which was \$187,600 in 2014. Perhaps more significant is the fact that median housing values in Park County increased by 112% between 2000 and 2014 compared to 96% for the state as a whole.

In order to get a better understanding of housing affordability and housing cost burden in Park County it is helpful to analyze housing costs as a percent of household income. The United States Department of Housing and Urban Development defines housing cost

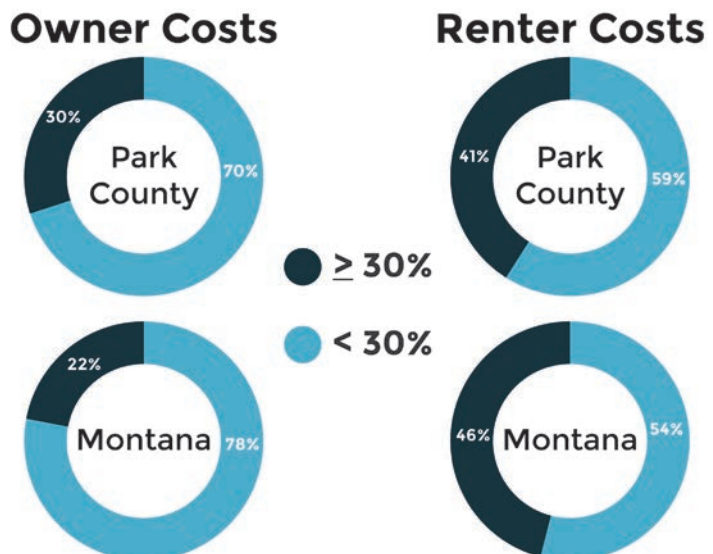
Table 3 - Types of Housing Units

	2000	2014	Change '00 – '14
Housing Units	8,247	9,360	13%
Single Family	5,877	7,554	29%
Multi-Family	1,047	971	-7%
Mobile	1,323	835	-37%

Table 4 - Housing Occupancy Indicators

	2000	2014	Change '00 – '14
Housing Units	8,247	9,360	13%
Vacant	1,419	2,821	99%
Vacant – 2ndHomes	793	1,062	34%
Occupied	6,828	6,539	-4%
Owner Occupied	4,536	4,895	8%
Renter Occupied	2,292	1,644	-28%

Figure 12 - Homeowner Costs and Rent as a Percent of Income 2014



burden as paying more than 30% of household income on housing. In 2014 an estimated 41% of renters in Park County had a housing cost burden, which is lower than the state as a whole where the figure is 46% - see Figure 12. While the figure is slightly better for owner occupied housing, still 30% of homeowners in Park County were estimated to have a housing cost burden in 2014 compared to 22% for the state as a whole.

Household Composition

As of 2014 there were an estimated 6,539 households in Park County, a 4% decrease from 2000 when there were 6,828 households. During this time period household composition shifted with the number of family households decreasing by 11% and non-family households increasing by 6%. At the same time the number of households with children under the age of 18 decreased by 30% and the number of households with an individual over the age of 65 increased by 15%.

Similar patterns have emerged during this time period when looking at household size. Between 2000 and 2014 the number of one and two person households in Park County increased by 10% and 1%, respectively, while the number of three and four or more person households decreased by 11% and 35%, respectively – see Figure 13. Despite the shift to more one and two person households, the average household size in Park County actually increased between 2000 and 2014 from 2.27 to 2.36. While these data may seem contradictory, the discrepancies are likely explained by the increase in average family size from 2.88 to 3.10 between 2000 and 2014.

Figure 13 - Change in Household Size 2000 - 2014



Land Use

Most of Park County is not zoned; therefore, land use patterns are primarily driven by the private market. Property has to be available for development; either for sale, or owned by an entity wishing to develop. The landowner looking to develop makes decisions on the density and type of development dependent on the market and the characteristics of the property.

The Montana Department of Environmental Quality’s (MDEQ) water and sanitation rules have the greatest impact on development patterns of all the rules and regulations administered by state or local entities. Most new development that divides property must be reviewed by MDEQ. The MDEQ rules typically require about one acre of land for individual wells and septic systems. This establishes a de facto minimum lot size of about one acre for most single family homes. If a public water or public sewer system is available, the de facto minimum lot size is smaller. If public water and public sewer systems are available, for example in Gardiner, there is no minimum lot size. The MDEQ minimum lot sizes are site specific considerations,

only addressing specific development proposals reviewed by the agency. **Map 2 - Park County Land Use Classifications**

Land Use Classifications

The Montana Department of Revenue’s tax classifications provide a high level view of the different classifications of land in Park County. The classifications identify lands by use including residential, commercial, industrial, agricultural, vacant, exempt, and other uses. Map 2 shows the land use mix in Park County based on these land classifications, while Table 5 shows the total acreage and percent share for each land classification.³ As can be seen, Park County is dominated by exempt land uses (public lands - primarily National Forest land) and agricultural/farmstead uses.

Land Ownership

Over half of the land in Park County (57%) is under public ownership. Map 3 shows the major categories of land ownership and management in Park County. Public lands include National Forest, National Wildlife Refuges, Bureau of Land Management lands, National Park lands, and state lands. The other 43% of land in the County is under private ownership. While most public lands are in the more mountainous and/or forested portions of the County like the Absaroka Mountains, private lands are mostly found in the river valleys like the Shields and Paradise valleys.

Residential Development Patterns

Over the first half of the previous century, residential growth was concentrated in, or near, established communities. In more recent years, much of the new growth has occurred outside of cities and towns in rural landscapes, particularly near rivers, public lands, and state highways and the interstate. Map 4 shows residential growth patterns in Park County over a 100-year period. While the population of Park County grew by 43% between 1970 and 2000, the amount of land developed increased by 293% reflecting the shift to more rural residential subdivisions. Residential growth slowed significantly during the recent recession, but new housing starts are now on the

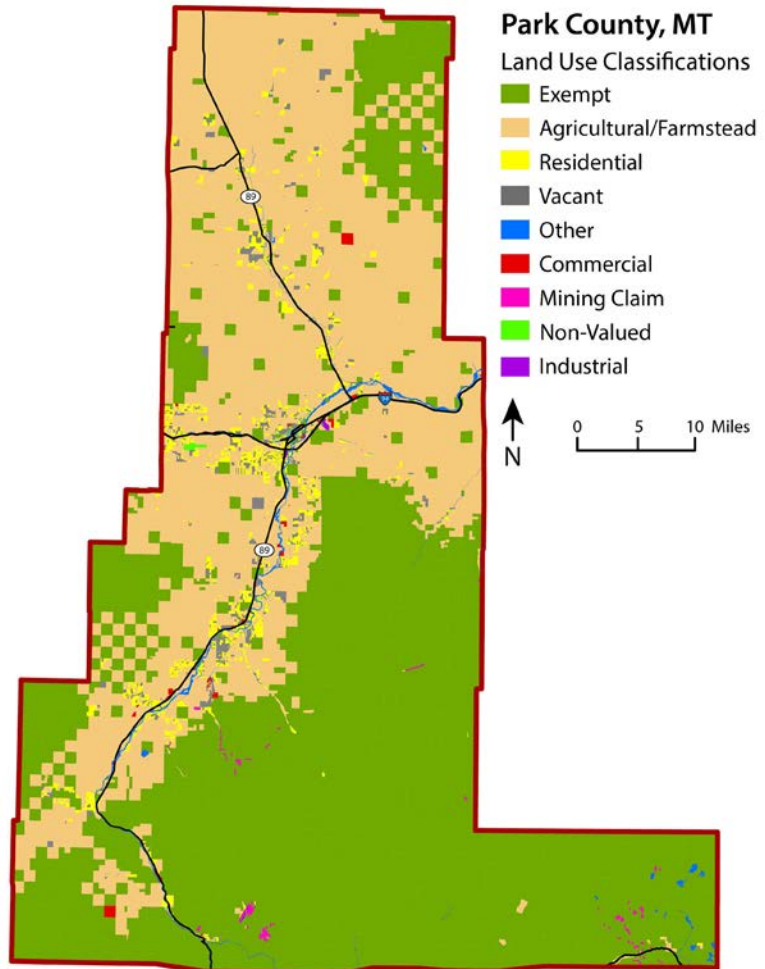


Table 5 - Land Use Classifications

	Acres	% of Total
Exempt	986,623	55%
Agricultural/Farmstead	733,290	41%
Residential	41,874	2%
Vacant	19,315	1%
Other	11,220	1%
Commercial	3,431	0.2%
Mining Claim	2,671	0.1%
Non-Valued	728	0.04%
Industrial	419	0.02%

³ Several land classifications were combined to simplify categories – e.g. residential rural and residential urban.

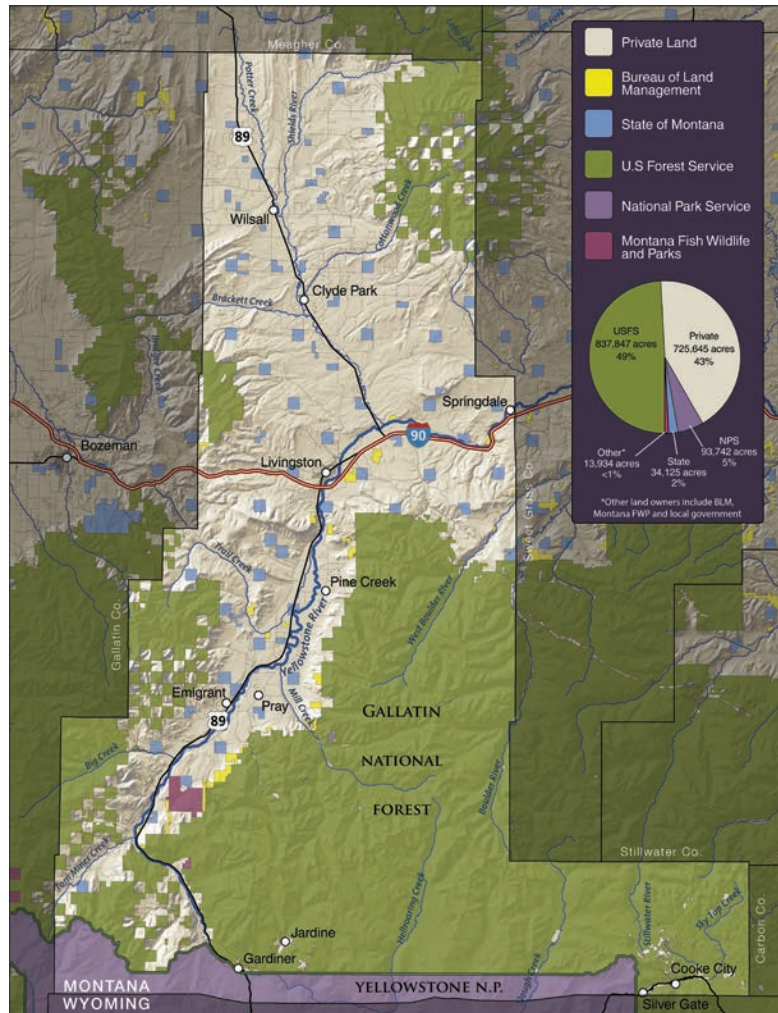
upswing in Park County although it is too soon to know if future rates and patterns of growth will reflect those of the recent past.

Subdivisions

The Park County Subdivision Regulations are the primary tool employed by the County to review development proposals. The subdivision review process is focused on ensuring that the design of a subdivision does not have negative impacts on public health and safety as well as other review criteria. The subdivision review process does not influence the location or type of development, and rarely impacts the density of a development.

The Montana Department of Natural Resources and Conservation manages water rights throughout Montana. The “exempt well rule” which allowed subdivisions proposing individual wells to be exempt from having to obtain a water right, is currently in flux. As of 2015-2016, most medium and large subdivisions need to obtain a water right. This rule change will likely impact development patterns in Park County, but to what extent is unknown.

Map 3 - Park County Land Ownership

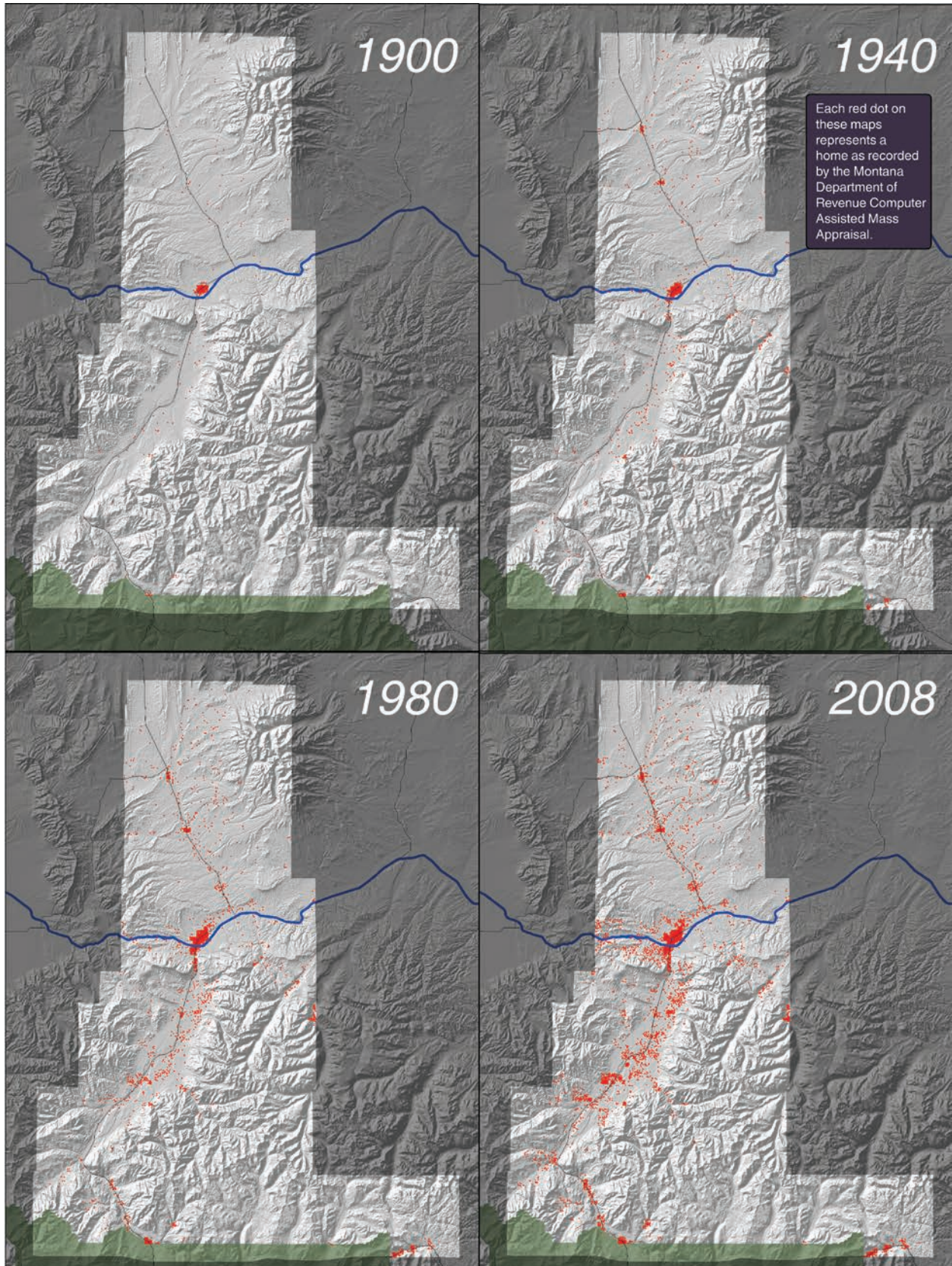


Subdivision activity in Park County has slowed over the past decade. However, divisions of land exempt from subdivision review, such as family transfers, have been utilized over the past several years. Between 2006 and 2010, 206 subdivision parcels were created in Park County, totaling 2,134-acres. During this time 108 family transfer parcels were created totaling 2,064-acres. The Park County Subdivision Regulations went through a series of revisions with amended regulations being adopted in 2006, 2008 and 2010.

Land Conservation

Many of the private and publicly managed lands in Park County benefit from some degree of natural resource stewardship. Because of their outstanding natural values, some of these lands may rank higher depending on the amount of protections already in place. Conservation easements on private land also benefit from a higher degree of protection through voluntary agreements made between landowners and the entity holding the easement. There are approximately 136 conservation easements in Park County, protecting just over 100,000 acres. Map 5 shows protected lands in Park County. Though certain land uses are prohibited, in many cases resource uses such as cattle grazing, or recreational activities such as hunting and fishing, are still allowed. In general though, these areas are protected for their natural or agricultural values, watershed functions, fish and wildlife habitat, or unique recreational opportunities.

Map 4 - Park County Residential Development Patterns



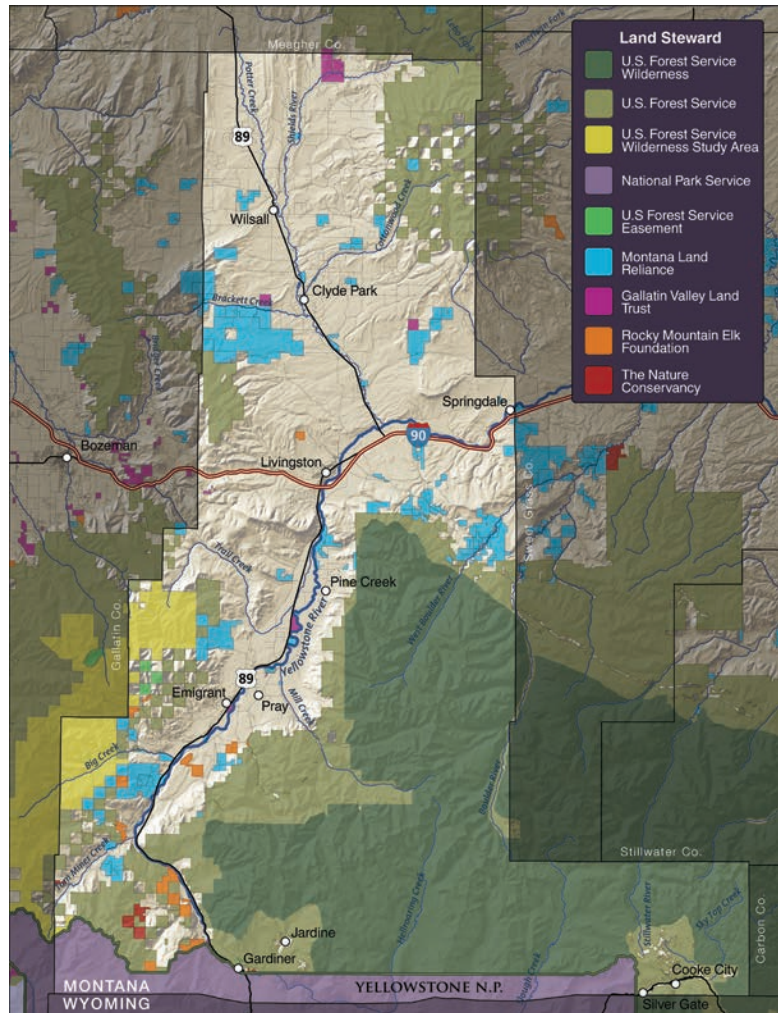
Local Services

Law Enforcement

The Park County Sheriff’s Office (PCSO) provides law enforcement, search and rescue, animal control and emergency related services to the citizens of Park County. Currently the office is staffed with fifteen (15) full-time Deputies which include the Sheriff, Undersheriff, Lieutenant, two Sergeants, two Detectives, two Corporals and six Deputies. The Detention Center currently staffs eight Detention Officers and houses a maximum of twenty inmates.

The PCSO also oversees the Search and Rescue Department, which provides a point of contact for search and rescue matters on a county-wide level. The department also provides a venue for search and rescue organizations to meet and provides education opportunities for Park County related to search and rescue issues and efforts. In addition to oversight from the PCSO, the department works closely with the Park County Disaster and Emergency Services Department as well as State of Montana Disaster and Emergency Services.

Map 5 - Park County Protected Lands



Fire Protection

There are a total of six fire districts in Park County and two separate fire departments serving the cities of Livingston and Clyde Park. These fire districts and departments include:

- Clyde Park City Fire Department
- Clyde Park Rural Fire District
- Cooke City/Silver Gate Fire District
- Gardiner Fire District/Gateway Hose Company
- Livingston Fire Department
- Paradise Valley Fire and EMS
- Park County Rural Fire District #1
- Wilsall Rural Fire District

Fire departments/districts in Park County have mutual aid agreements set up to facilitate requests for mutual aid. In some cases, automatic aid agreements are in place. These requests are processed through 911 dispatch.

Social Services

The local office of the Human Resource Development Council provides programs such as Head Start, food banks, homeless and emergency services, transportation for senior and individuals with disabilities, job training, rental assistance, home buyer education and weatherization and energy assistance services.

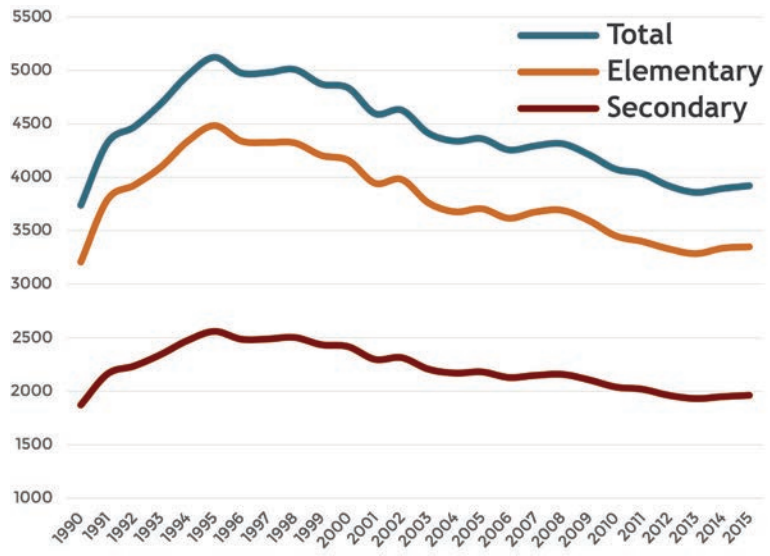
Medical Services

Livingston HealthCare’s critical access hospital and clinic serves all of Park County and was recently upgraded with a state of the art facility. The new facility operates a 25-bed critical access hospital, a multi-specialty physician practice, rehabilitation services, and home-based services.

Education

There are seven public school districts with eleven schools in Park County. These schools include: Arrowhead School, Cooke City School, Gardiner Schools, Livingston Schools, Pine Creek School, Shields Valley Schools and Springdale School. As of 2015 total public school enrollment stood at 1,959, a 10% decrease since 2005 – see Figure 14. However, since 2013 there has been a slight increase in public school enrollment. In addition to public schools there are more than 300 home school and private school students. Private schools within Park County include: Montessori Island School, St. Mary’s Catholic School and Thomas More Elementary/Henry Wadsworth Longfellow Academy.

Figure 14 - Public School Enrollment 1990 - 2015



Solid Waste

Park County residents living outside of Livingston (where curb side pick-up is available) must bring their solid waste to one of the 17 green boxes located in communities throughout Park County. County trucks then collect waste from the green boxes and transport it to the City of Livingston Transfer Station for eventual disposal at a landfill in Great Falls. Park County is also cooperating with the City of Livingston to allow county residents to recycle glass and other recyclables at the City Transfer Station.

Power

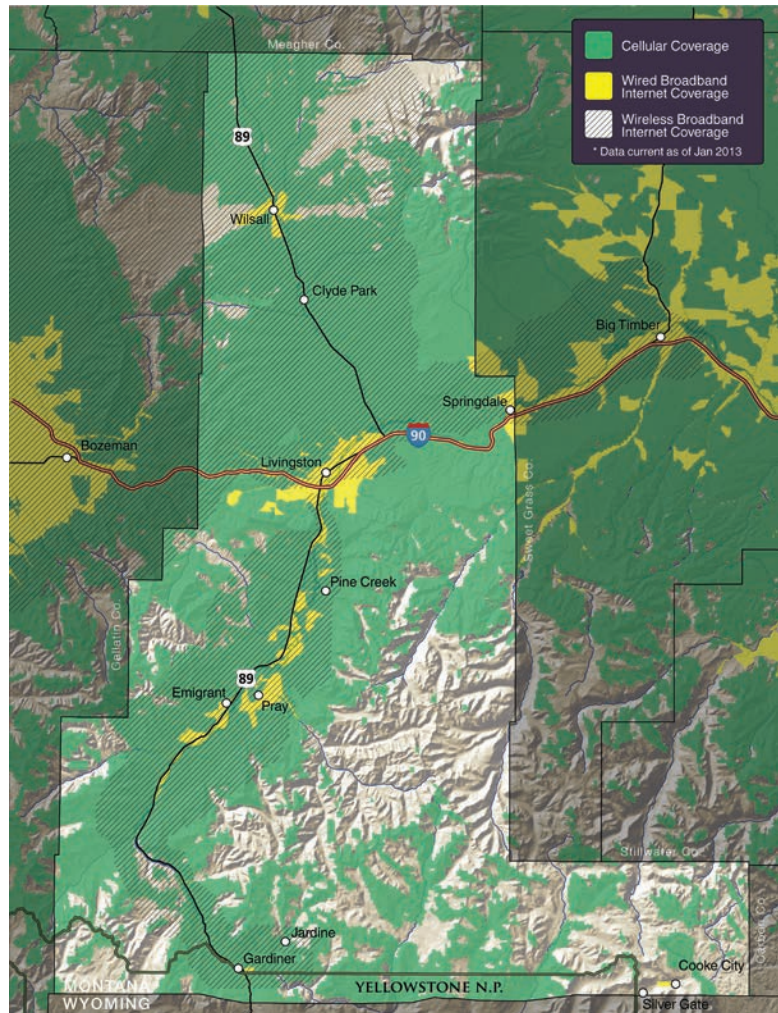
With the exception of the Livingston, Gardiner, and the Cooke City-Silver Gate area, Park Electric Cooperative, Inc. provides electric power throughout Park County. NorthWestern Energy provides electric service to Livingston and Gardiner (Alliance Development Corporation). Flathead Electric Cooperative, based in Kalispell, Montana, provides electric power in the Cooke City-Silver Gate area. Livingston is the only area in Park County where natural gas is provided.

Telecommunications

Map 6 shows wireless and cell phone availability in Park County in 2013, as identified by the National Telecommunications Information Administration (NTIA) and the State Broadband Data Development Program (SBDD). The areas defined in this data are for those facilities-based providers of wireless broadband service that are not address-specific (e.g., nomadic, terrestrial mobile wireless, or satellite)

and depict areas in which broadband service is available to end-users. For various reasons, there may be places in these mapped areas where cellular phone and broadband coverage may not be available, and these coverage maps are subject to periodic changes. The Northern Rocky Mountain Economic Development District (NRMEDD), which includes Park and Gallatin counties, is currently working on efforts to enhance broadband capabilities in the region through a fiber optic and broadband technology infrastructure improvement project.

Map 6 - Park County Broadband and Cellular Coverage



Public Facilities

Transportation

Roads

The Park County Road Department is responsible for maintaining the County's 1,152 miles of roads. Map 7 shows local, state and federal roads in Park County. In October 2014, Park County Transportation Standards were formally adopted by the Park County Commission in order to provide the minimum requirements for the design, construction and reconstruction of the Park County Transportation System, which includes, but is not limited to roads, bridges, culverts and trails.

The Montana Department of Transportation is responsible for state and federal highway system facilities in Park County. The Montana Department of Transportation plans highway projects in five-year increments through the statewide transportation improvement program (STIP). The current STIP (2016-2020) has several projects programmed for Park County including reconstruction of the Mission Interchange on Highway 89 North of Livingston, rehabilitation of a section of Highway 89 through Yankee Jim Canyon, and other small safety improvements in the Paradise Valley.

Non-motorized Transportation

Park County's transportation system is largely auto-oriented with few bicycle and pedestrian facilities located outside of Livingston and other established communities. There currently exists an off-street path extending south from Livingston along Highway 89. The County has acquired grant funding to expand this trail south to the Old Yellowstone Trail North Road. In recognition of the need to further develop the County's non-motorized transportation network, Park County recently adopted an Active Transportation Plan, which identifies a path forward for expanding trails, sidewalks, and other non-motorized facilities. Map 8 shows planned active transportation routes in Park County.

Airport

The City/County Joint Airport Board in Livingston was first organized in 1960 as a municipal airport available for private pilots and small planes. A joint resolution between the City Commission of Livingston and the Park County Commissioners established a five-member board to operate and control the airports at Mission Field (located Southeast of Livingston), Wilsall, and Gardiner. Mission Field is home to several small to intermediate-sized aircraft whose owners rent hangars from the Airport Board. There is also a ground lease rental program upon which individuals may construct their own hangars to fit their needs. Rentals and ground leases are also available at the Gardiner airport. The Wilsall airport is used primarily for farming and ranch activities.

Para-Transit

The Angel Line Transportation service provides transportation to the people of Park County who are senior citizens, over the age of 60; disabled people of all ages; persons who require wheel chair access; and, people under 60 who are assisting senior citizens or disabled persons who need special care. Angel Line transports people for a variety of purposes including medical appointments, recreation, shopping and work.

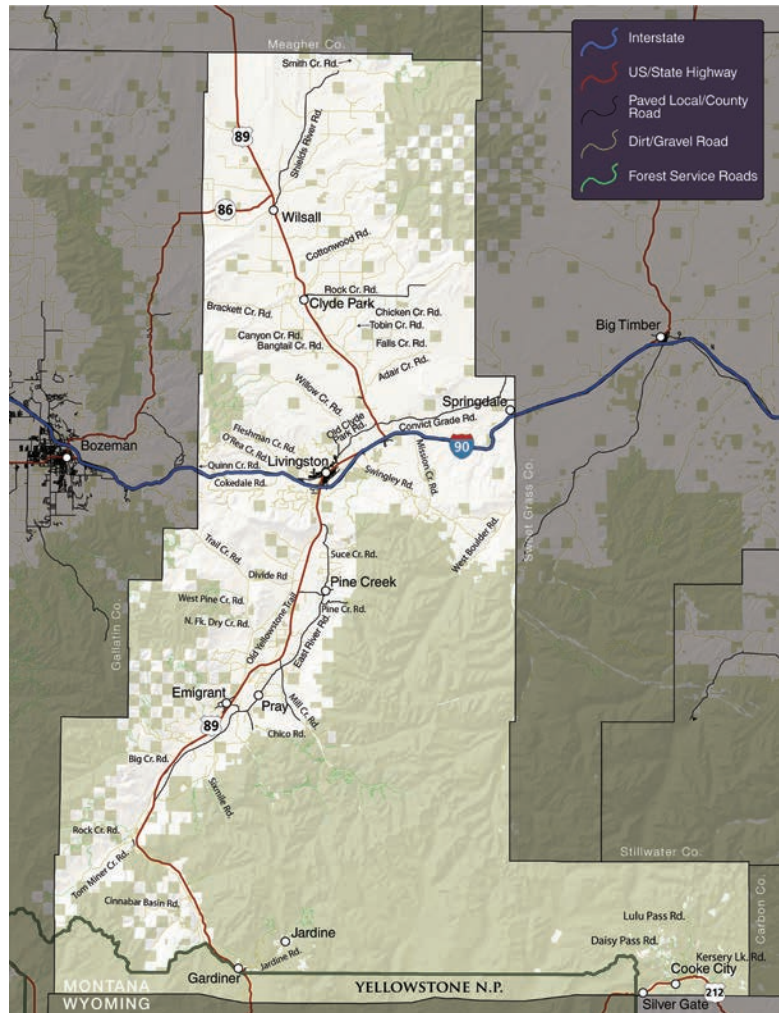
Rail

The only rail line in Park County is operated by Montana Rail Link and parallels I-90. Montana Rail Link offers rail service for cargo only. Historic narrow gage track still exists throughout parts of the county along the Highway 89 corridor, but the easement for the rail line from Livingston to Yellowstone National Park was relinquished by the rail owner many years ago and the easement was acquired by adjoining landowners.

Parks

Park County currently has four small parks located throughout the County, these include, Green Acres Park in Livingston; Confluence and Arch Parks in Gardiner; and, Silver Gate Park in Silver Gate. The City of Livingston also manages numerous parks and trails within city limits. In addition, there are also many privately owned and operated parks spread throughout Park County. In 2014 Park County completed a parks inventory and assessment for Green Acres and Silver Gate Parks which provides detailed recommendations for improvements.

Map 7 - Park County Road Network



Fairgrounds

The Park County Fairgrounds operates and manages this County facility to provide and promote a safe, clean, enjoyable and comfortable environment for public use and participation. Typical annual events include the County Fair, Christmas Fair, Professional Rodeo Three-Day Event and the Professional Bull Riding Event. Other activities include team roping events, family reunions, special functions and events and auctions. The facility offers electricity for RVs, dry camping, showers, horse stalling, building and arena rental, parking, kitchen amenities, barns and boat and RV storage.

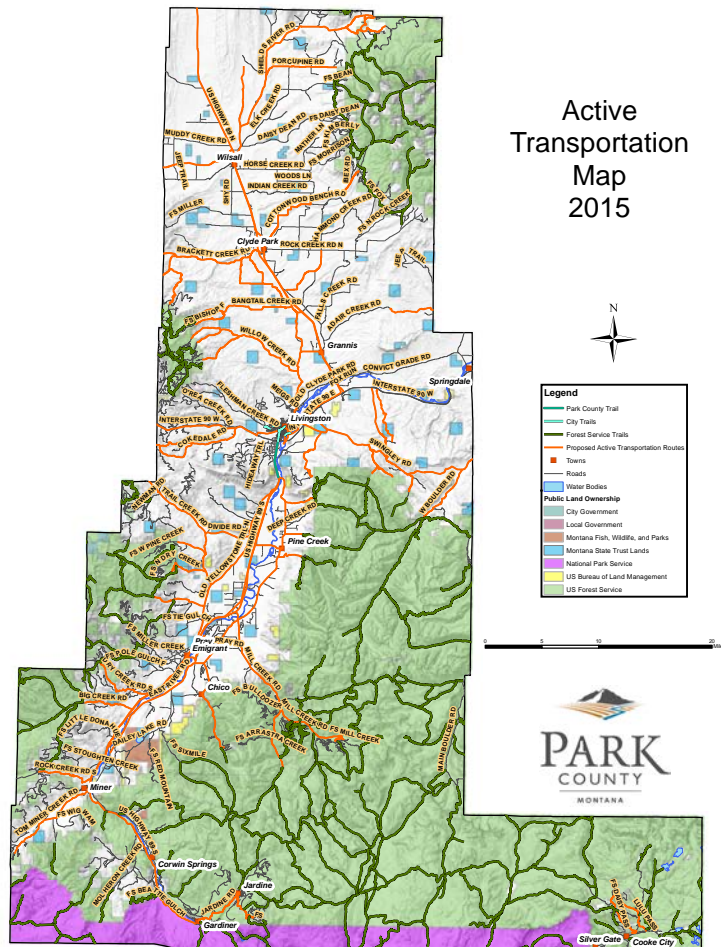
Water

Outside of the communities of Clyde Park, Wilsall, Livingston, Gardiner, Cooke City, and Silver Gate, almost all Park County residents rely on individual groundwater wells for their water supply. Table 6 shows the community water systems serving municipal areas and the approximate population served by these systems. Of these systems, Livingston and Clyde Park are the only incorporated jurisdictions. There are also several community water systems in place serving specific sites in Park County, including trailer parks, schools, campgrounds and similar uses. For residents not supplied with water from a community water system most rely on individual wells. As of spring 2016 there were 5,695 wells in Park County, 22% of which were drilled since 2005. Of these 5,695 wells 79% are used for domestic purposes, 9% for stock water, 7% for monitoring, and 6% for irrigation.⁴

Wastewater

Wastewater systems in Park County are primarily individual septic drain field systems. Gardiner and Livingston are the only communities that have public wastewater systems.

Map 8 - Park County Active Transportation Plan



This map is for informational purposes only and not for legal, engineering or surveying purposes. Park County assumes no legal responsibility for this information and shall not be liable for any

Table 6 - Community Water Systems

Area Served	Pop. Served
Clyde Park	350
Cooke City	300
Gardiner	700
Livingston	7500
Silver Gate	37
Wilsall	250

4 <http://mbmgwic.mtech.edu/sqlserver/v11/reports/CountyStatistics.asp?MTCOUNTY=PARK>

Natural Resources

Agricultural Soils

Park County has a rich history of agricultural production. Today, much of Park County’s agricultural soils are classified as moderate to lower productivity, with the Shields Valley yielding the highest overall productivity classification. Map 9 shows soil productivity throughout Park County. The high elevation terrain throughout the County constricts the more productive soils to the valley floors. Both the Shields Valley and Paradise Valley are characterized by irrigation pivot lines, cattle ranches, hay and alfalfa production and other agricultural crops.

Sand and Gravel Resources

Sand and gravel resources are generally, but not always, located along streams, rivers, or areas where certain kinds of geologic events have occurred. Map 10 shows currently permitted open cut mines in Park County. Sand and gravel are important construction materials which are intended to be utilized, particularly in areas where extraction and processing will not negatively impact nearby landowners and existing uses.

Water Resources

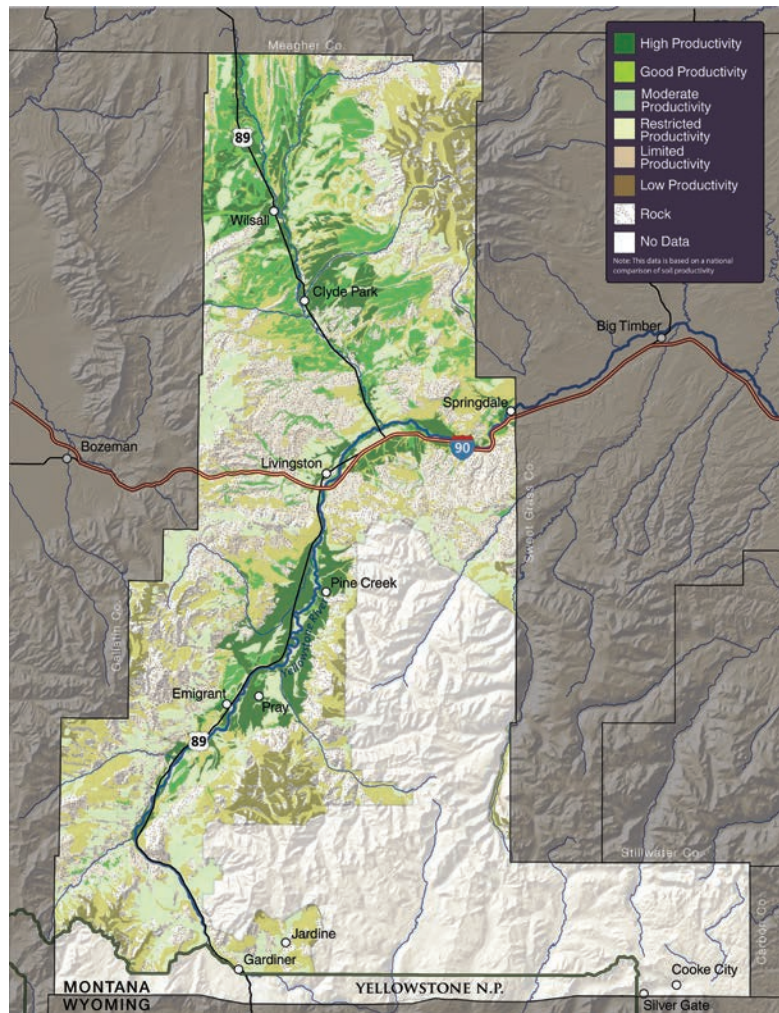
Surface Water

Surface waters in Park County, in the form of streams, creeks, and rivers flow from the Absaroka, Bridger, Crazy, and Gallatin mountain ranges. The wide variations in elevation add to the complex drainage system. Groundwater also contributes to surface water resources. The two major river drainages in the County include the Yellowstone River flowing from the south and the Shields River flowing from the north. These two rivers provide water for irrigation, livestock, domestic and municipal needs, fish, and recreation opportunities. There are also many small, privately-owned reservoirs that provide water storage scattered around the County. See map 11 for an overview of watersheds in Park County.

Ground Water

The availability and quality of ground water is dependent on geological conditions. The geology of Park County is complex and has been shaped by deposition, uplifting, and volcanic and glacial action and potential water yields from the different formations vary greatly. Several interrelated aquifers are located under the Paradise Valley. Groundwater is also available in glacial till and alluvial fan deposits, but yields are typically lower. Seasonal stream runoff is extremely important to the groundwater recharge in the Paradise

Map 9 - Park County Soil Productivity



Valley area. Most of the ground water appropriations lie in the Yellowstone and Shields River valleys.

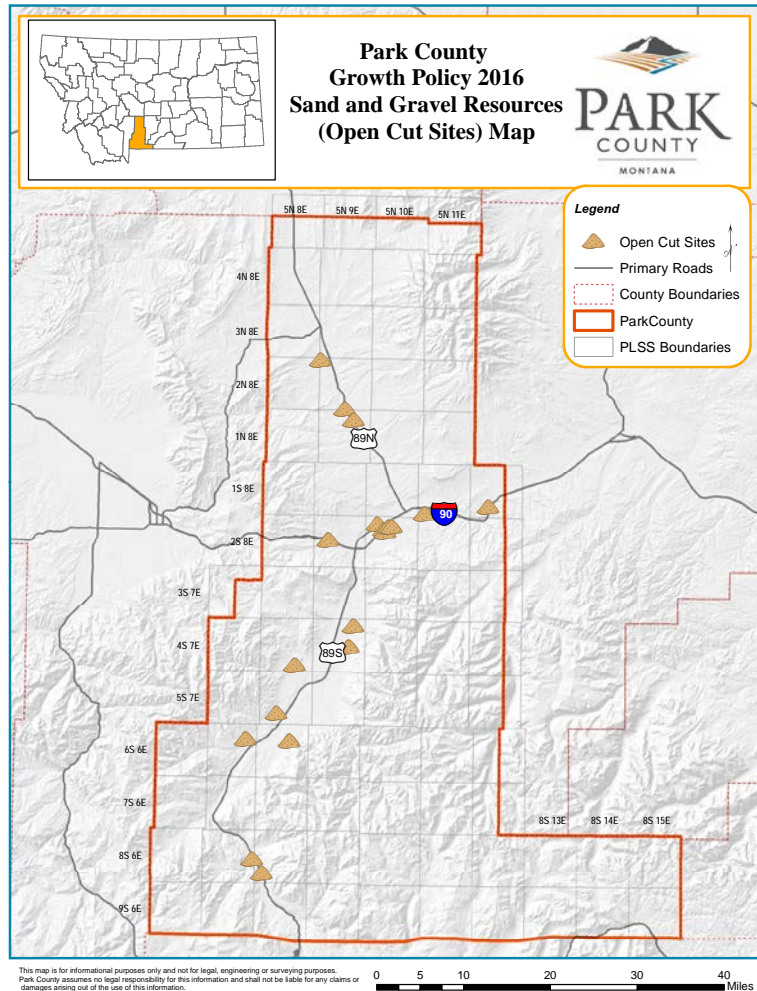
Wetlands

Wetland areas in Park County consist of springs, marshes, bogs, river oxbows, beaver ponds, and ponds and lakes. Wetlands are defined by physical (soil and water) and vegetative (plant) characteristics. Wetlands, although not abundant in Park County, are some of the most productive lands in the County in terms of supporting a variety of wildlife and vegetation. Healthy wetlands function to maintain water quality and reduce the impacts of seasonal flooding. Due to high water tables, wetlands are not areas conducive to development and their development is regulated by state and federal law.

Vegetation

Due to the range of elevations, aspects, geology and soil types, and precipitation amounts, there is great diversity in the vegetative cover in Park County. Cottonwoods and mixed riparian vegetation line the river bottoms of the Yellowstone and Shields Rivers. The lower elevation river valley bottoms are either used for agricultural production or covered by native and introduced grasses. Above the valley floors - in small drainages with higher soil moisture - mixed deciduous shrubs are found. The drier foothills above the valleys are covered by grass and sagebrush with scattered pine and fir trees. Higher elevation slopes above the valley bottoms are covered by more densely timbered pine and fir forests containing small grassy meadows and openings. Recent and historic wildfires have left burn scars throughout the higher elevations of the County with standing snags and young regenerating forests. In the highest and wettest locations of the County - the Cooke City area, the Absarokas, and the Crazy Mountains - alpine meadows, rock outcroppings, and snowfields dominate.

Map 10 - Park County Open Cut Mine Permits



Fish and Wildlife

Fish

The Upper Yellowstone River contains a premiere trout fishery. Rainbow and brown trout were introduced historically into what was once a Yellowstone cutthroat fishery. The Yellowstone and Shields Rivers remain strongholds for Yellowstone cutthroat trout, designated as a species of special concern by Montana Fish, Wildlife, and Parks. A small number of high mountain lakes in the Absaroka, Bridger, and Crazy Mountain ranges are stocked with Yellowstone cutthroat trout. Map 12 shows the relative quality of 46 cold and warm water game fisheries available to anglers in Montana. Streams are classified according to fish species size and abundance, the number of sport fish species found there, and the presence of unique fishing

opportunities. Class I waters in Park County, such as the Yellowstone River, rank in the top 3% of Montana’s sport fisheries: Class II and Class III streams fall within the next 22%.

Wildlife

Park County is home to a diverse population of wildlife. Remarkably, Park County supports all the large species of wildlife that were present when Lewis and Clark first stepped foot in Montana in 1805. All 12 species of ungulates and major predators still occur. Park County is best known for its large elk populations and its large predators; grizzly bears, black bears, mountain lions, and gray wolves.

Park County supports a significant wintering elk population which includes migratory elk from Yellowstone National Park. Elk congregate in large herds in the foothill/grassland/sagebrush habitat in the winter months. Elk may spend the late summer and early fall on lands used for agriculture and grazing. Much of the habitat used by elk in the County is located on private land where agriculture operations occur.

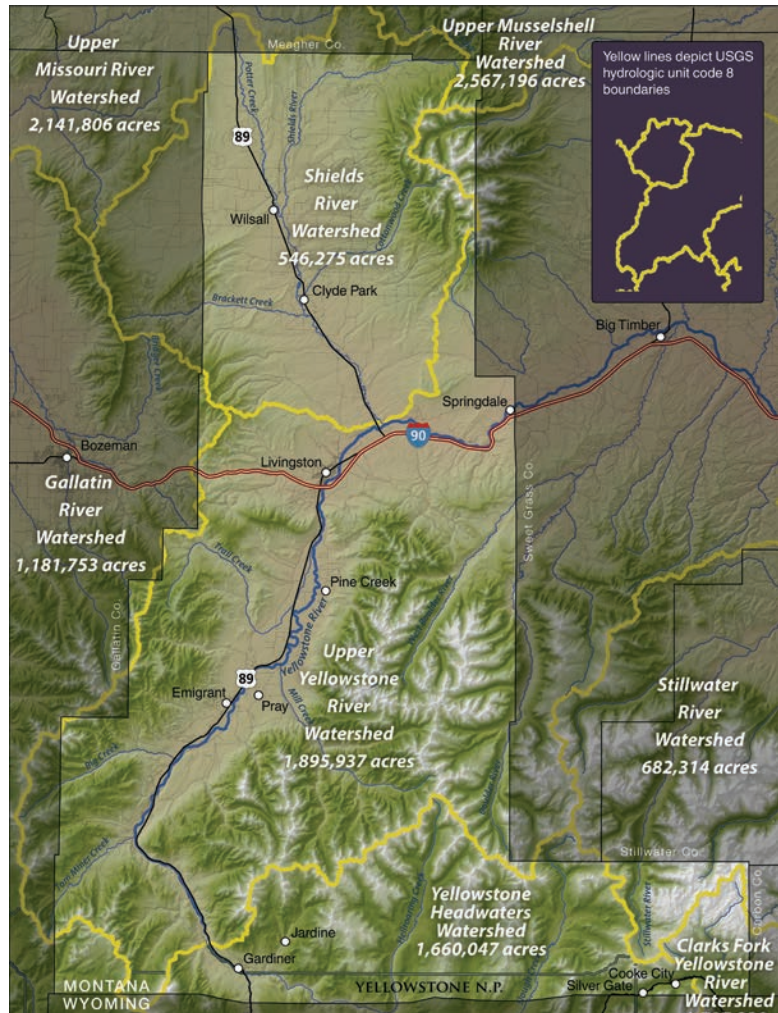
Grizzly bears, black bears, mountain lions, and gray wolves typically use the riparian, foothill grassland, and forest habitats, but can and do venture into agriculture and residential areas. When this happens, wildlife and humans can come into conflict.

Mule deer range across much of the lower elevation areas of the County, occupying riparian, agricultural, foothill grassland, and forested habitats. In the winter, deer prefer south and west slopes, wind-blown areas, and hay meadows. White-tailed deer occupy agricultural and riparian habitats. Deer-vehicle collisions are common in the County.

Wildland-Urban Interface

Wildland fires are a fact of life in Park County, and fires are burning faster, hotter and scorching more acreage than in the past. At the same time, more homes are being built in the hills and forests across the County. As a result, the costs of fighting fires is increasing, as well as the risk to people and property. The Park County Community Wildfire Protection Plan (CWPP) focuses on “wildfire assessment including wildfire history, updated fuel models, historic fire regimes, values at risk” as well as “assessment of emergency egress routes in need of hazard mitigations, a clear definition of the Wildland-Urban Interface (WUI) in the local landscape, an explanation of weather’s relationship to wildfires, and a prioritization of specific fuel reduction areas and or projects.”

Map 11 - Park County Watersheds



Map 13 displays the WUI as identified in the CWPP. The CWPP defines the WUI as:

1. An area within or adjacent to an at-risk community identified in recommendation to the Secretary in a Community Wildfire Protection Plan; OR
2. In the case of any area for which a Community Wildfire Protection Plan is not in effect:
 - An area extending ½ mile from the boundary of an at-risk community,
 - An area within 1 ½ miles of the boundary of an at-risk community, including any land that:
 - Has a sustained steep slope that creates the potential for wildland fire behavior endangering the at-risk community Has geographic feature that aids in creating an effective firebreak, such as a road or ridge top; OR
3. Is in Condition Class 3, as documented by the Secretary in the project-specific environment analysis; AND
4. An area that is adjacent to an evacuation route for an at-risk community that the Secretary determines - in cooperation with the at-risk community - requires hazardous-fuel reduction to provide safer evacuation.

Map 12 - Park County Game Fish Quality



This definition is out of date with the current definitions used by state and federal agencies. A more in-depth discussion, including a definition of the WUI is required as part of the 2016 Park County Growth Policy update to meet the requirements of state law.

Current Regulations Regarding Development in the WUI

Park County has adopted standards in the subdivision regulations that require a fire protection plan to mitigate impacts to public health and safety. The regulations require specific considerations for subdivisions located in the WUI as defined by a host of different sources. The regulations require water supplies, safe turn-arounds for emergency vehicles, fuels treatments and other provisions.

Recreation

Park County is an outdoor recreation paradise. There are numerous opportunities for residents and visitors alike to pursue their favorite outdoor activities, whether they are interested in hiking, backpacking, camping, biking, cross-country skiing, horseback riding, snowmobiling, hunting, golfing, or a multitude of water recreation activities. Maps 14 and 15 show respective recreational opportunities in northern and southern Park County.

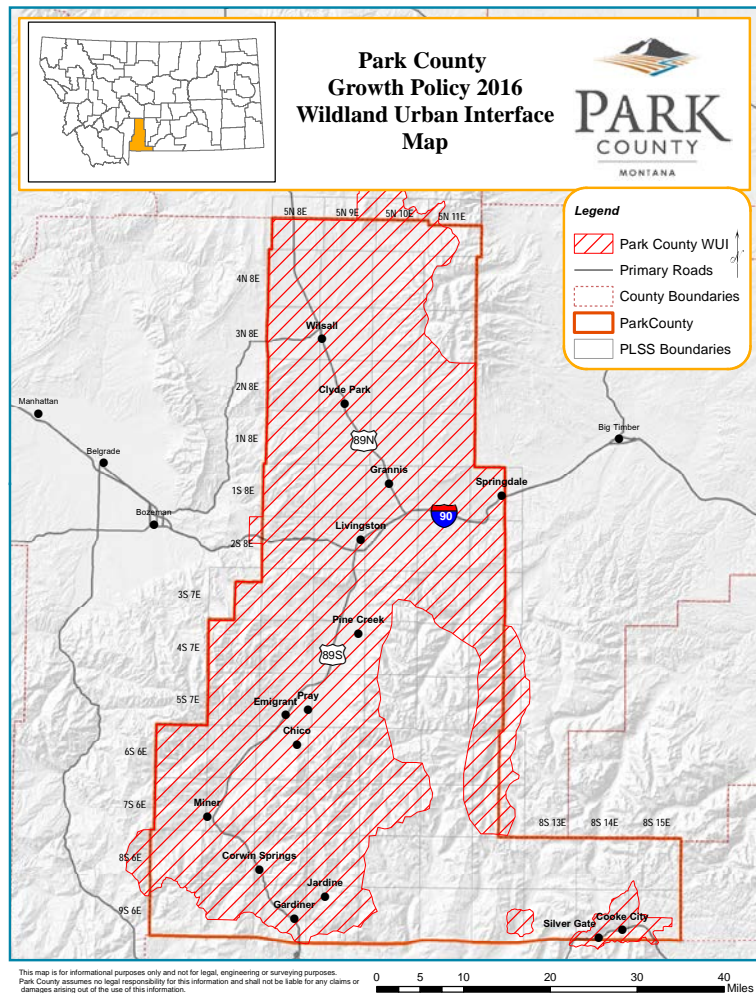
Hundreds of miles of trails and forest roads on the Custer-Gallatin National Forest provide access to scenic mountain lakes, deep woods, and wildflower-filled meadows. Some of these can be accessed by motorized vehicles, while others are restricted to hikers or people on horseback. In the winter, these same trails provide skiers and snowmobilers with both groomed and ungroomed snow sport opportunities. The rivers, streams and lakes of Park County are famous for their excellent fishing, primarily for trout but also in some places for warm-water species like walleye. These same waters make for excellent boating, from white-water rafting or kayaking to rowing a drift boat on the Yellowstone or fishing from a motor boat on Dailey Lake in Paradise Valley.

There are ample camping opportunities on public lands including developed campgrounds such as Pine Creek and Mill Creek in the Custer-Gallatin National Forest, as well as hundreds of thousands of acres of backcountry where visitors can pitch a tent and savor the solitude of some of America’s wildest mountain ranges including the Gallatin, Crazy, and Absaroka mountains.

Many landowners welcome responsible sportsmen and women on their property through programs like the Department of Fish, Wildlife and Parks Block Management Program, as well as outfitted or fee hunting and fishing, including the famous spring creeks of Paradise Valley.

Finally, Park County is the original and only year-round gateway to the world’s first and perhaps most beloved national park – Yellowstone. The Yellowstone visitor center in Mammoth on the northern edge of the park is an excellent place to learn about the wonders of Yellowstone and the many ways to explore and enjoy it. Together with the national forest and other public lands, the rivers, streams and lakes, and the wide-open spaces preserved by farms and ranches, Park County has something for everyone who enjoys outdoor pursuits in a natural environment.

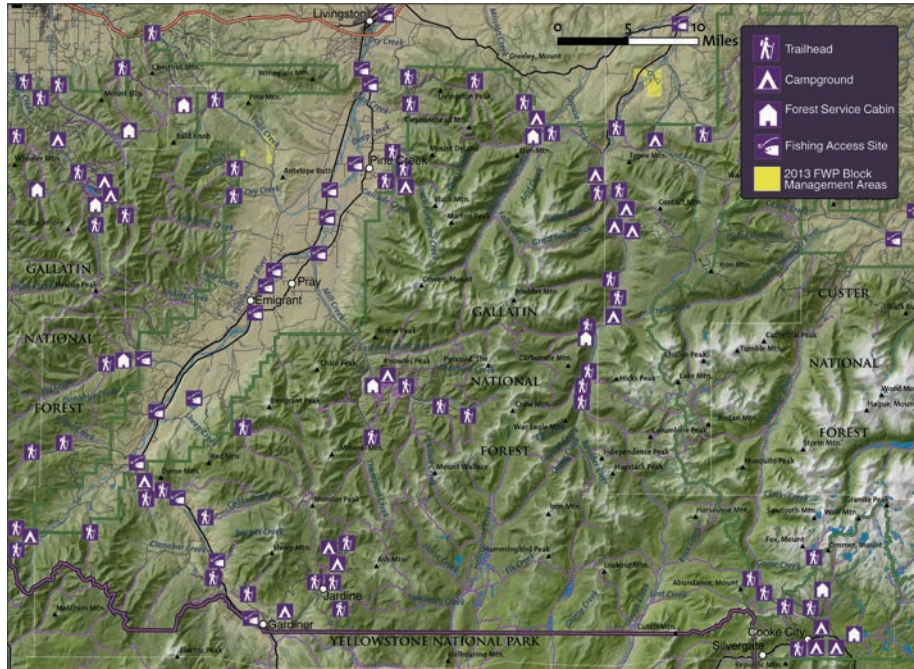
Map 13 - Park County Wildland-Urban Interface



Map 14 - Northern Park County Recreation Opportunities



Map 15 - Southern Park County Recreation Opportunities



Economic Impact of Recreation

From hunting and fishing to visiting Yellowstone National Park and nearby National Forest lands, recreation spending has a substantial economic impact in Park County. The University of Montana’s Institute for Tourism and Recreation estimates that non-resident visitor expenditures in Park County were just under \$200 million in 2014, an increase of 17% since 2011. The top five highest spending categories in 2014 were, fuel, restaurants/bars, accommodations, outfitters/guides, and groceries/snacks – see Table 7. Furthermore, a recent report from the National Park Service estimated that visitors to Yellowstone National Park in 2015 spent more than \$493 million in local communities through direct spending and employment income.

Table 7 - Park County Non-Resident Visitor Expenditures

Spending Category	2011	2012	2013	2014	Change '11 -'14
Gas, Diesel	\$61,532,000	\$76,978,000	\$84,143,000	\$73,431,000	19%
Restaurant, Bar	\$31,153,000	\$41,474,000	\$37,540,000	\$35,320,000	13%
Hotel, Motel, B&B	\$23,708,000	\$26,011,000	\$22,598,000	\$21,143,000	-11%
Outfitter, Guide	\$8,980,000	\$10,733,000	\$11,605,000	\$19,969,000	122%
Grocery, Snacks	\$14,943,000	\$16,998,000	\$17,848,000	\$17,271,000	16%
Retail	\$15,693,000	\$16,557,000	\$14,903,000	\$13,999,000	-11%
Rental Cabin	\$4,552,000	\$5,147,000	\$5,422,000	\$7,457,000	64%
License, Fees	\$2,930,000	\$5,547,000	\$5,382,000	\$2,503,000	-15%
Auto Rental, Repair	\$1,392,000	\$941,000	\$1,354,000	\$1,691,000	21%
Campground	\$2,118,000	\$1,221,000	\$1,092,000	\$1,303,000	-38%
Transportation Fares	\$0	\$12,000	\$774,000	\$858,000	na
Gambling	\$163,000	\$132,000	\$398,000	\$813,000	399%
Service	\$416,000	\$323,000	\$204,000	\$266,000	-36%
Farmers Market	\$0	\$53,000	\$84,000	\$59,000	na
Total	\$167,580,000	\$202,127,000	\$203,347,000	\$196,083,000	17%