



Envision Gallatin

LAND USE & HOUSING STRATEGY

Steering Committee Meeting #2

December 13, 2023 | 2:00-4:00pm

<https://us02web.zoom.us/j/89434555269>

Agenda

General Status Update

Discussion: Draft Land Use and Policy Audit (30 min)

- Do the Overarching Themes/Policy Gaps identified reflect your priorities for the FLUM/HS process?
- Are there any plans/policy documents relevant to this effort that that we've missed?

Discussion: Draft Outline - Housing Needs Assessment (30 min)

- Will the proposed approach/content provide sufficient guidance relative to the County's role?

Discussion: Draft Outline - Land Use Profile (50 min)

- Does the outline cover the topics you'd like to see addressed? Does the proposed organization and level of detail seem logical in relation to the existing condition information provided in the Growth Policy document (Chapters 4 and 6)?
- Do the proposed subareas seem logical based on the criteria presented?

Next Steps (10-min)

- Steering Committee Meeting #3: December 13
 - Review/discuss draft County Land Use Profile and Housing Needs Assessment



Envision Gallatin

LAND USE & HOUSING STRATEGY

Land Use and Housing Policy Audit

Draft: December 2023

1. INTRODUCTION

Gallatin County initiated the Envision Gallatin Land Use and Housing Strategy project with the objective of creating a Future Land Use Map (FLUM) and Housing Strategy (HS), which are identified as short-term actions in the 2021 Gallatin County Growth Policy. The HS will serve as the Housing Element in the Growth Policy. County staff and members of the project team hosted a series of kick-off meetings in Gallatin County from November 7-9, 2023. The meetings were held with representatives from a wide range of stakeholder groups to discuss recent trends, issues, and opportunities related to land use, growth and development, and housing in Gallatin County. A total of 12 focus groups were held with 50 participants representing a variety of interests and community perspectives, along with a kick-off meeting with the project steering committee.

The purpose of this Land Use and Housing Policy Audit is to summarize relevant aspects of the various plans and policies that currently guide land use and housing decisions throughout Gallatin County, along with information gathered from project stakeholders during the initial meetings. The Policy Audit will serve as a baseline to inform the FLUM and HS process.

This document is organized into two parts:

- ***Overarching Themes/Policy Gaps.*** This section summarizes the overarching themes/policy gaps that emerged from initial focus groups and stakeholder interviews, as well as from the project team's review of existing plans and studies.
- ***Policy Audit.*** This section includes a brief summary of land use and housing policies from relevant countywide and area-specific plans and studies. Plans and studies are organized alphabetically by community or topic. In some instances, a summary of recent trends and related information is also provided, based on input received as part of initial focus groups.

2. OVERARCHING THEMES/POLICY GAPS

The following overarching themes/policy gaps emerged from initial focus group discussions and the project team's review of adopted plans and policies in Gallatin County.

Limited tools to guide the location and intensity of growth in unincorporated areas.

One of the primary roles of the FLUM will be to provide greater predictability about where and how growth should be encouraged—or discouraged—in unincorporated areas of Gallatin County. While adopted neighborhood and area plans provide broad policy guidance on desired future land use patterns and conservation priorities, a countywide land use framework—for both existing and future land use—is lacking. Implementation of adopted plans and policies is also hindered in some locations by zoning that no longer reflects community needs (or that is lacking altogether). Clearer guidance is needed on the types and intensities of land uses that are suitable in different locations to assist with the objective review of proposed developments, but also to help inform near- and long-range roadway and transit planning within the County.

Additional clarity about existing and future land use patterns is also needed to support growth policies that prioritize the preservation of agricultural and environmentally sensitive lands. The FLUM process will draw from the Gallatin Valley Sensitive Lands Protection Plan (Draft) and the ongoing efforts of organizations of area land trusts, agricultural, and conservation organizations.

Lack of clarity regarding current and planned infrastructure capacity in rural water and sewer districts.

Adopted plans and policies encourage the concentration of growth in municipalities and areas that have (or are planned for) infrastructure and services. While this guidance is relatively straightforward to apply in areas served by municipalities that routinely update their capital facility plans, a central repository of available capacity and long-range plans for rural water and sewer districts does not currently exist. A countywide perspective is necessary to help decision-makers, service providers, municipalities, property owners, land management agencies, residents, and others understand where higher-intensity development is suitable and likely to occur at some point in the future. A Regional Water and Wastewater Study is currently underway; however, this effort is focused primarily on the identification of a long-term strategy for the population centers of Belgrade and Bozeman.

Need for stronger guidance for subdivisions that rely on exempt groundwater wells.

Since 1973, Montana has allowed permit exemptions for wells and developed springs that produce fewer than 10 acre-feet of water a year and whose flow rates are less than 35 gallons per minute. This law has facilitated the subdivision of land where no water use permitting is required from the Department of Natural Resources and Conservation (DNRC). Managing the impact of subdivisions that rely on this exemption has become increasingly challenging for the County and DNRC. In Gallatin County there have been trends towards larger subdivisions and subdivisions in more remote and environmentally sensitive areas in the attempt to evade water rights permitting through the use of exempt groundwater wells. As

part of the FLUM process, a broader discussion is needed about the relationship between water and development in rural areas.

Lack of clarity about the types and magnitude of housing opportunities that exist in unincorporated areas.

As documented through the Gallatin County Regional Housing Strategy (2021), the lack of affordable housing options is a growing challenge for long-time residents, as well as the regional workforce and economy. Adopted plans and policies generally encourage the concentration of future housing in municipalities or in other areas where infrastructure and services exist.

Challenges specific to the unincorporated areas of Gallatin County include the lack of affordable housing in or near resort areas like Big Sky and Bridger Bowl and the effect this has had on “downstream” communities like Gallatin Gateway, Belgrade, and Four Corners. While some of the unincorporated communities in Gallatin County—like Big Sky—are proactively planning for and building higher density housing to serve the local workforce, others were more cautious about expressing support for opportunities beyond what currently exists due to existing Part 1 Zoning, ongoing community concerns about the potential impacts of more intense growth and development on community character and quality of life, and/or a desire to protect the rural, agricultural character of the area.

The FLUM and HS process provides an opportunity to clarify the types and extent to which regional housing needs can be accommodated in unincorporated areas of Gallatin County. The HS will go into more detail than the 2021 Regional Housing Strategy to show how housing gaps vary by area of the county, workforce inter-relationships, and explore additional implementation measures for the County and other partners. Possible strategies to explore include:

- Encouraging a wider range of housing types (including mobile and manufactured home parks), particularly near or within job centers;
- Stabilizing or protecting housing in existing neighborhoods that are already on the more affordable end of the spectrum;
- Identifying areas with existing water and sewer services that could support higher intensity development;
- Identifying ways that the County can use incentives or negotiated agreements to secure permanent affordability/attainability in a portion of new units created through County review processes;
- Developing assets owned by local governments (land) with permanently affordable/attainable housing through public-private partnerships;
- Supporting statewide advocacy and lobbying efforts to broaden allowable housing policy tools and regulations in Montana;
- Determining how to support non-profit housing developers and owners; and
- Aligning housing policies with the municipalities to create a level playing field.

3. POLICY AUDIT

Overview

The Future Land Use Map and Housing Strategy will be informed by existing policy documents. Below is a collection of countywide and area-specific policies and studies that may influence land use category designations and recommended approaches to housing development and preservation. Not all documents reviewed as part of this audit have been formally adopted by Gallatin County. However, they contain information that will help inform growth and development decisions near unincorporated communities. In some instances, a summary of recent trends and related information about individual communities is also provided. This section is organized into two groups—those that are adopted by the County, and those that are not adopted by the County.

Adopted by the County

GROWTH POLICY (2021)

The Envision Gallatin County Growth Policy was completed in 2021 and is organized around the themes of heritage, open space, and opportunity. A Land Planning Map and associated matrix are provided to highlight how the Growth Policy interacts with existing land planning tools adopted throughout the County. At a high level, the Growth Policy has the most influence on property that is unzoned and without a neighborhood or area-specific plan. That influence decreases as local planning documents and zoning regulations are introduced. The Growth Policy has little influence over municipal lands and land within municipal extraterritorial planning jurisdictions.

The document also defines seven criteria for subdivision review (as established by the state of Montana) and provides guidance for how subdivision proposals will be evaluated for their impact on the stated criteria. The document goes on to include a list of goals and policies for advancing the County’s vision, including ten policies related to the goal of promoting “equitable, inclusive housing options” and addressing “anticipated housing needs by accommodating a range of housing options at different price points.” An action plan for implementing the Growth Policy is also included. The development of a Future Land Use Map is listed as a short-term action item in the Implementation Table.

TRIANGLE COMMUNITY PLAN (2020)

The Triangle Community Plan, adopted in 2020, lays out a coordinated approach to growth and development in the Triangle area of Gallatin County, which generally encompasses the area between Bozeman, Four Corners, and Belgrade. The document groups goals found in the Four Corners Community Plan, Bozeman Community Plan, Belgrade Growth Policy, and Gallatin County Growth Policy into three key planning issues: land use, infrastructure, and environment; each of which contain a broad range of subtopics for consideration (e.g., housing, transportation, water resources and wetlands, etc.). A list of goals and policy recommendations are provided that address key planning issues identified above. Overall, the Triangle Community Plan emphasizes infill development where services

already exist and coordinating efforts across multiple zoning districts and planning jurisdictions in the area.

There are four existing zoning districts within the boundaries of the Triangle area: Four Corners Zoning District, Gallatin County/Bozeman Area Zoning District (Donut), Zoning District #1, and River Rock Zoning District. Zoning District #1 was adopted in 1970 and River Rock Zoning District was adopted in 1978.

BOZEMAN AREA PLAN (2005)

The Bozeman Area Plan covers future development in the County land that surrounds the City of Bozeman, otherwise known as the Bozeman “donut.” The plan breaks the “donut” into four quadrants, highlighting the future land uses that might be appropriate in each quadrant.

- *Northwest*—parks; open space; industrial and manufacturing; agriculture; low-, medium-, and high-density residential; mixed-use; and conservation subdivision.
- *Northeast*—industrial and manufacturing; open space; and conservation subdivision.
- *Southeast*—open space; agricultural residential; low-, medium- and high-density residential; mixed-use; and conservation subdivision. Medium- and high-density residential along the 19th Avenue corridor.
- *Southwest*—agriculture; open space; agricultural residential; and conservation subdivision. Medium- and high-density residential may be appropriate along the 19th Avenue corridor near the University. Commercial uses near Huffine Lane.

The Gallatin County/Bozeman Area Zoning Regulations were adopted in 1999 and amended in 2018.

Recent Trends/Related Information

- Need for MOU with City regarding annexation policy
- County update to zoning regulations in order to bring them into closer alignment with City

AMSTERDAM CHURCHILL COMMUNITY PLAN (2010)

In 2010, the Amsterdam-Churchill community adopted a Community Plan with guiding principles, recommendations for the town core and rural areas, and a set of district-wide policies. The document calls for infill development of the town core, with residential development following the existing pattern of low-density development, plus the potential of accessory dwelling units and medium-density residential options near the retirement home. Areas marked for future commercial development are included along the north side of Amsterdam Road between Camp Creek and Churchill Road. In the more rural areas of the community, the Plan suggests limiting residential development to one dwelling unit per 160 acres, with the exception of cluster developments at a density of one dwelling unit per 80 acres.

The Amsterdam and Churchill communities are not currently zoned.

Recent Trends/Related Information

- Representatives from the Amsterdam Churchill community spoke about the need for area-specific and countywide policy decisions to consider the perspectives of agricultural producers. This includes:
 - Pursuing a bottom-up approach that incorporates feedback received from the agricultural community; and
 - Providing protections for existing infrastructure that serves Gallatin County agricultural operations (e.g., local roads for moving farm equipment, irrigation channels, etc.).
- Participants noted that the Manhattan Christian School is a popular draw for new residents to the Amsterdam Churchill community and acknowledged that the best way to accommodate growth would be through infill development in the town core.

BRIDGER CANYON GENERAL PLAN AND DEVELOPMENT GUIDE (1989)

The Bridger Canyon General Plan and Development Guide appears to have been last updated in the 1990s and contains information about the amount of residential and commercial development the community was prepared to accommodate. Residential developments located within the Bridger Canyon Zoning District but outside the Base Area are expected to maintain a density of one dwelling unit per 40 acres, unless a PUD is granted, in which case the density can be increased to one dwelling unit per 10 or 20 acres. Recreational housing (which does not have any length of stay requirements) and overnight accommodations may be provided within the Base Area at a rate of 200 units and 600 units each, respectively. As for commercial development, the plan states that not more than five acres of neighborhood commercial development is required to serve the needs of the Bridger Canyon community at full capacity.

Zoning was adopted for Bridger Canyon in 1971 and was amended in 2021.

Recent Trends/Related Information

- Participants stated a desire among Bridger Canyon residents and business owners to consider additional future updates to Bridger Canyon Zoning Regulations and Area Plan(s) to review existing residential densities, the potential for accessory dwelling units, and the prohibition of commercial activity outside of the base area.

BRIDGER BOWL BASE AREA PLAN (1999)

This document functions as a subset of the Bridger Canyon General Plan and Development Guide. The intent of the Base Area Plan is to coordinate the development of up to 800 residential units with the expansion of year-round recreational activities that are available in the Base Area. The plan identifies three topics related to commercial activities that are necessary to encourage the development of year-round activity in the Base Area:

- Increase the available land for commercial development to more than the five acres allotted in the General Plan.

- Permit commercial activity that is accessory to recreational activities (such as equipment rentals) near Bridger Bowl and Crosscut.
- Allow if overnight accommodations at higher densities near commercial areas and Base facilities.

Recent Trends/Related Information

- Limited attainable housing options and traffic congestion along Bridger Canyon Drive were cited as major issues by representatives from Bridger Bowl Ski Area and Crosscut Mountain Sports Center. Transit options are being explored by the recreation facilities, but operation costs and a lack of bus drivers limit bus service options.
- An update to the Bridger Bowl Base Area Plan is planned to address emerging demand for year-round recreation, “recreational housing,” and other considerations for the future of the area. This effort is anticipated to take one to two years to complete.

FOUR CORNERS COMMUNITY PLAN (2006)

The Four Corners Community Plan contains nine policies for advancing the community’s vision of balancing diverse, mixed-use neighborhoods with agricultural production. Policies include:

- Encourage a variety of uses by including residential (low, medium, and high density), commercial (core and neighborhood), public services industrial, agriculture, and park and trail development.
- Support constraints-based planning with emphasis on sustainability and suitable mixed-use developments by supporting the use of cluster development techniques that integrate use of landscaping and/or open space.
- Support the provision of economical and efficient public services and infrastructure, including transportation, water, and sewer service.

The Four Corners Zoning Regulation was adopted in 2009 and amended in 2018.

GALLATIN GATEWAY COMMUNITY PLAN (2009)

The Gallatin Gateway Community Plan contains 11 principles directing community growth. Three growth patterns are summarized here:

- Town Core Growth Pattern
 - Development should follow the existing platted pattern (four lots per gross acre, with potential for multiple uses on each lot).
 - New residential development along the east boundary of the Town Core should match existing rural residential (one- to ten-acre lots).
 - Heavy industrial uses prohibited in town core.
- Rural Growth Pattern
 - Large lot subdivisions relying on wells and septic systems.
 - Support for cluster development to the east, west, and south.
 - Commercial uses to be limited to home occupations.

- Gravel pits are common in this area.
- Highway 191 Corridor
 - Anticipated commercial development along the Northern highway district.

The Gallatin Gateway area is not currently zoned.

GALLATIN GATEWAY SITUATION ASSESSMENT (2023)

- Participants noted that the lack of zoning regulations creates uncertainty around the type of development that will occur in the Gallatin Gateway area.
- Participants highlighted a number of issues impacting the quality of life in their community, including:
 - A lack of clarity around which organization is responsible for providing sewer and water services to the area;
 - A need to improve basic infrastructure, such as providing streetlights or traffic calming devices;
 - A scarcity of publicly accessible land to foster community interactions; and
 - An increase in traffic congestion along the Highway 191 corridor.

SPRINGHILL DEVELOPMENT PLAN (1992)

The Springhill community first adopted a development plan in 1992 for the purpose of guiding development within the area while protecting the natural environment and rural character of the community. The plan includes goals related to encouraging residential cluster developments, preserving lands suitable for agriculture, and protecting natural resources, such as stream channels and riparian areas.

Recent Trends/Related Information

- The Springhill community values and prioritizes traditional agricultural lifestyles and environmental conservation. Some participants stated that large lot sizes should be maintained to protect agricultural lands. They also noted that Ross Creek, and its associated tributaries, are high-priority riparian areas that should be subject to additional protections.
- Other participants raised concerns about the need to diversify the types of accessory uses allowed by right on agricultural properties, including additional dwelling units for employees associated with agricultural operations, and commercial opportunities such as “glamping,” wedding barns, or farm-to-table dining events.

OTHER PLANS AND POLICIES

Additional plans and policies for specific areas the County include:

- Gooch Hill West
- Bear Canyon Development Plan
- Bozeman Pass
- Big Sky Zoning Plan

- Hyalite Zoning Plan
- South Gallatin Zoning Plan

Not Adopted by the County

Plans and policies in this section are organized based on those that fall within County jurisdiction, and those that fall outside of County jurisdiction.

REGIONAL HOUSING STUDY (2021)

The Gallatin County Regional Housing Study (RHS) functions more as an educational document or data repository than a policy document. The RHS provides a current (as of 2021) assessment of the local economy, housing markets, and community housing needs by compiling jobs and housing data from key community areas across the County and highlighting the connections between them. While the document does not include a list of policy recommendations, numerous strategies are provided to address housing needs across multiple income levels. A greater need for collaboration among all community groups is emphasized throughout the document.

The RHS was created with support from the One Valley Community Foundation, which is a nonprofit organization working to address community issues in the Gallatin Valley. This group also supports the Regional Housing Coalition (RHC) which works to coordinate and activate solutions to housing affordability and availability across Gallatin County. Gallatin County is a participant in the RHC, with both staff and elected official representatives.

WITHIN COUNTY JURISDICTION

Big Sky Community Vision and Strategy (2022)

This document, completed in 2019 and updated in 2022, was created by the Big Sky Resort Area District and has not been formally adopted by the County. Vision elements are organized into four categories: people, recreation, natural environment, and character. The plan does not contain details about where growth and development should be targeted, or at what densities, but does include an implementation strategy to “coordinate on development of affordable and rental housing,” which aligns with the goals of the FLUM and HS.

Big Sky Community Capital Improvement Plan (2023)

The Big Sky Community Capital Improvement Plan (CIP) establishes a ten-year planning horizon for infrastructure needs that will serve as the foundation for future decision concerning the development of public facilities. The document analyzes the demand for improvements among multiple categories, including arts and education, economic development, health and safety, housing, public works, and recreation and conservation.

Big Sky Housing Needs Assessment (2022)

The Big Sky Housing Needs Assessment was finalized in 2018 and updated in 2022. The document evaluates several components of the housing and job market, including existing and proposed housing

inventory, wage growth projected to the year 2027, and changes in home price points and rent since the initial Assessment was completed.

Recent Trends/Related Information

- Big Sky is experiencing rapid growth and development compared to other unincorporated communities across the county. Affordable housing projects (Riverview and Powderlight) are already underway along the Lone Mountain Road corridor, which is served by the Big Sky County Water and Sewer District services.
- Representatives identified the following resources available to the Big Sky community that may be used to address the area's housing needs:
 - Resort tax dollars;
 - Strong partnerships between local developers, such as the Big Sky Community Housing Trust and Lone Mountain Land Company; and Philanthropic donations collected from various property owners in the community.

OUTSIDE OF COUNTY JURISDICTION

Belgrade Growth Policy (2020)

The Belgrade Growth Policy contains a series of goals and objectives organized around the themes of live, work, play, learn, move, and grow. Policies include:

- Encourage subdivisions to be in areas planned or zoned for development, contiguous with existing development, and in areas where infrastructure and services exist at an adequate level to support development.
- Discourage development in unincorporated areas where it doesn't make sense for safety, public infrastructure, noise, traffic, etc.
- Encourage mixed use buildings to promote new and innovative housing options Downtown.
- Identify opportunities to retain and improve mobile homes and mobile home parks.
- Allow development of high quality manufactured housing developments.
- Encourage growth in the east, west, and south commercial/industrial corridors.
- Prioritize commercial sites near the airport, Interstate 90, and existing industrial parks.
- Developments in the County should be encouraged to connect to or construct their own public water and wastewater system.

The document also contains a FLUM with a 4.5-mile Planning Jurisdiction and implementation matrix highlighting opportunity sites and public improvement projects. The following land use categories are included in the FLUM:

- *Suburban* supports new family-oriented neighborhoods with accessory uses to accommodate daily activities, such as civic uses and neighborhood retail options. Suggested residential density of one to five dwelling units per acres.

- **Residential High Density** is intended to accommodate denser multi-family housing options located adjacent to Belgrade's zoning jurisdiction (likely to be zoned and/or annexed by the City in the future). Suggested residential density of five to 25 dwelling units per acre.
- **Commercial** supports the development of commercial uses along major transportation corridors and the creation of medium-scale business facilities.
- **Manufacturing** allows for the development of light industrial, fabrication, and sand and gravel mining away from areas marked for residential development.
- **Public** supports the creation of civic uses in or near residential areas to promote walkability to the adjacent neighborhoods.
- **Airport** supports aviation-related uses and may also be appropriate for commercial development and very low-density residential uses at a suggested density of one dwelling unit per ten acres.
- **Agriculture** properties are covered by existing conservation easements. No anticipated change.
- **Future Growth Areas and Non-Designated Areas** are not anticipated to change before the Growth Policy or FLUM are amended.

Unincorporated areas around Belgrade include a mix of zoned and unzoned areas. Belgrade works in close coordination with Gallatin County on growth issues. The Belgrade City Council and Gallatin County Commission are responsible for making decisions regarding land use and development in Belgrade's 4.5-mile extraterritorial planning jurisdiction.

Recent Trends/Related Information

- Belgrade has traditionally been viewed as a desirable (and affordable) place to live for regional workers and has worked to densify and provide housing options that fit the needs of the workforce.
- Belgrade has experienced significant growth since 2010, impacting the affordability of all housing types, including townhouses, condos, and apartments. According to City staff, if development occurs as proposed in Belgrade's 2020 Future Land Use Map, the build out would reach the maximum capacity of the City's recently updated water and sewer system.
- The City continues to explore options for future annexation and recently initiated a Master Plan process that will address future transportation, parks, and utilities. This effort is expected to be complete in 2025.
- In the past, the City permitted between 300-400 dwelling units per year. Permits have increased to 1000 per year since COVID. The City's population is projected to exceed 14,000 by 2024.

Bozeman Community Plan (2020)

Bozeman's 2020 Community Plan strives to answer the question of how and where the City can accommodate growth. It generally correlates future land use planning with utilities planning, highlighting where services *could* be expanded, rather than where they *should* be expanded. This approach provides the City with more flexibility to respond to market demand and property owner needs within its growth area but limits the ability to anticipate where and when the City's boundary development may shift over time.

The plan includes seven themes for a well-planned city, each of which is supported by a broad range of goals and policy objectives. Policies include:

- Increase required minimum densities in residential districts;
- Promote a diverse supply of quality housing units;
- Pursue annexations consistent with the future land use plan and adopted facility plans for development at urban intensity;
- Encourage increased development intensity in commercial centers and near major employers; and
- Collaborate with Gallatin County regarding annexation and development patterns adjacent to the City to provide certainty for landowners and taxpayers.

The plan includes a FLUM for the City as well as a half-mile to two-mile area around the City in the Gallatin County jurisdictional area. The future land use categories identified in the plan include:

- ***Urban Neighborhood*** includes urban-density homes in a variety of types, sizes, and intensities. This type of development is expected to occur within municipal boundaries and may require annexation prior to development.
- ***Residential Mixed Use*** promotes neighborhoods dominated by a variety of housing types supported by small-scale commercial and civic uses. This type of development is appropriate near commercial centers and should be supported by multimodal transportation options.
- ***Community Commercial Mixed Use*** supports commercial areas with retail and personal service, as well as office and tourism-related uses. This type of development should occur along arterial and collector streets.
- ***Traditional Core*** supports infill development of Bozeman's Downtown area that is multi-story, walkable, and in line with the existing character of the Main Street Historic District.
- ***Regional and Commercial Services*** includes regionally significant developments in large buildings. Large community scale areas in this land use category are generally 75 acres or larger.
- ***Maker Space Mixed Use*** includes mixed use areas that provide employment and services to the community. Housing elements may be provided above the ground floor to support live/work operations.
- ***Industrial*** provides areas for industrial operations near significant transportation corridors.
- ***Parks and Open Lands*** supports the creation and preservation of outdoor open spaces.
- ***Public Institutions*** includes property owned by public entities, such as the City of Bozeman and Montana State University.
- ***No City Services*** identifies areas where the City does not anticipate expanding infrastructure to support development in the near future.

Recent Trends/Related Information

- The City of Bozeman is nearing completion of a major code update. If approved, the updated regulations will substantially expand housing allowances in many parts of the City.

Manhattan City-County Growth Policy (2023)

The Town of Manhattan recently adopted an updated Growth Policy in 2023. The following details are included as part of the future land use categories:

- **Residential** currently consists of primarily single-family homes. Anticipated future uses include more housing typologies (attached, duplex, triplex, townhouse, ADUs) and smaller commercial uses, like home-based businesses and small-format offices or civic uses. Suggested density range of three to six dwelling units per acre.
- **Downtown, Granary Mixed Use, and Gateways** are areas that support a mix of developments along walkable, improved streets, such as retail, office, entertainment, and higher-density residential uses. Anticipated density of six to seven dwelling units per acre.
- **Employment** is the light industrial and commercial district located along Interstate 90 on the southwestern border of town.
- **Institutional/Governmental** is intended to provide opportunities for areas of outdoor recreation and agriculture, as well as civic uses like libraries and schools. Suggested density range of one dwelling unit per ten acres or less.
- **Agriculture** areas are meant to stay largely undeveloped. Suggested density of one dwelling unit for every three to ten acres, maximum (excluding agricultural units).

The unincorporated areas around Manhattan are not currently zoned.

Recent Trends/Related Information

- The Town of Manhattan is in the process of creating an amendment to its Growth Policy to provide more detailed policy guidance for the Town's extraterritorial planning jurisdiction.
- The representative from Manhattan stated that there is concern among residents that existing agricultural land will be converted to sprawling residential development. They also noted that all future development proposals will be evaluated in light of:
 - Impacts of the proposed development on agricultural lands; and
 - The availability of police and fire to service new subdivisions.

Three Forks Growth Policy (2022)

The Envision Three Forks Growth Policy summarizes the existing conditions and future vision for the City, which centers around people, the economy, and the environment. The document contains a future land use map with six future land use categories:

- **Future Residential** reflects the existing pattern of single-family development while allowing for a broader range of "missing middle" housing types. The suggested residential density is five to 15 dwelling units per acre.
- **Downtown Commercial** prioritizes infill mixed-use development along Main Street with potential for retail and personal service uses, along with higher-density residential and lodging options. Suggested residential density is 12 or more dwelling units per acre.

- **Mixed Use/Light Industrial** supports the creation of office, retail, and industrial uses along Frontage Road adjacent to the airport, and as transition area between residential and industrial properties. The suggested residential density is one dwelling unit per ten acres when used for agricultural operations.
- **Industrial** supports the development of industrial uses located within the southern portion of the City along Talc Road.
- **Public Lands/Institutional** supports the development of parks, open space, and civic uses while preserving habitat areas and agricultural lands. Cluster development may also be appropriate.
- **Agricultural** is intended to protect existing agricultural lands until the City is ready to service them with urban infrastructure, with suggested residential density of one unit for every three to ten acres, maximum.

The FLUM included in the Three Forks Growth Policy shows opportunities for growth to the northwest, assuming completion of planned floodway improvements that would bring a substantial number of properties out of the Jefferson River floodplain. Most of the remaining land in the City's extraterritorial planning area is designated as Agricultural. Establishing interlocal planning and land use agreements with Gallatin County for the Three Forks extraterritorial planning area is listed as a short-term strategy for the City to advance the goals of its Growth Policy.

The unincorporated areas around Three Forks are not currently zoned.

Recent Trends/Related Information

- The City of Three Forks is in the process of updating its Capital Improvement Plan (CIP). The City is also working on a floodplain mitigation project that would remove a large area along Sabina Road from the Jefferson River Floodplain.
- Participants stated that one of the largest issues facing the City is the impact of growth in Broadwater County on City services and the lack of clarity among residents around which governmental organization is responsible for providing essential services, such as police and fire assistance. For example, many residents living in Broadwater County rely on Gallatin County and Three Forks to provide services outside of their jurisdiction.
- Other growth-related issues/opportunities in the vicinity of Three Forks that were cited included an existing airport in the area (owned by Gallatin County) that may provide opportunities for airport-oriented development and the potential for infill development in rural subdivisions near Willow Creek.

West Yellowstone Growth Policy (2017)

In 2017, the town of West Yellowstone adopted an update to their Growth Policy. The document identifies several key issues that must be addressed for the community to realize its goals and vision, including housing affordability and availability; short-term commercial rentals; developing the recently annexed 80 acres with housing, mixed-uses, and live/work units; updating and modernizing zoning; and expanding water and sewer services and capacity.

Recent Trends/Related Information

- In the spring of 2022, the West Yellowstone Town Council passed a moratorium on new connections to or uses of the Town's wastewater treatment system. To better meet the area's water needs, the Town plans to construct a new wastewater treatment plant (which is currently out for bid and anticipated to be completed in 2026).
- The 80 Acre Expansion Planning Report was completed in 2019 and provides a framework for how the 80 acre site could be developed to include a mix of uses and housing types. Development in this area is expected to be served by the Town's new wastewater treatment plant.
- The Town of West Yellowstone is currently working with HRDC to complete the West Yellowstone Housing Needs Assessment, which is expected to be available to the public at the beginning of 2024. The document is intended to shed light on the current and future housing needs of the community.



Envision Gallatin

LAND USE & HOUSING STRATEGY

Housing Strategy Outline and Approach

The Gallatin County Housing Strategy (HS) will be comprised of two phases of work:

- Housing Needs Assessment – Assesses housing market conditions and demand (demographics, economy and wages) and gauges any mismatch between demand and the housing supply. Provide breakouts for key areas of the County to illustrate differences and interrelationships.
- Strategy and Action Plan – The recommended strategies, policies, and actions for the County. It will also recommend how the County can support the municipalities and non-profit housing organizations.

Housing Needs Assessment

Data for the Needs Assessment will focus on the unincorporated County. However, some comparisons will be made to the municipalities as that information will inform the thinking on the County's role compared to the municipalities and other partners.

Supply

- Define market analysis areas – Coordinate with work on the Future Land Use Map (FLUM) to define subareas of the County for housing market and demographic analysis. Define areas based on similar market characteristics, and location and land use characteristics.
- Housing stock – Describe the housing stock, including structure type, age, size, occupancy and vacancy rates, and tenure (renter or owner occupied).
- Housing market and costs – Analyze market data to show trends in prices and rents. Show the distribution of prices and translate prices to incomes and wages needed to afford housing.
- Assess the impact of second/vacation homes and other external market factors.

Demand

- Demographics – Summarize factors such as household incomes, household size, household type (e.g., families and roommates), and age as they relate to housing demand.
- Economy and labor force – Estimate commuting flows between major job and population centers. Document major industries, wages, and trends and relate to housing costs (ability to pay) and demand.
- Housing issues and security – Interview service providers to understand the most prevalent housing challenges people face and the types of assistance that are needed.
- Demand and housing gaps – Identify the types of housing most in demand and how the market is or is not aligned with demand (gaps). Also recommend where or what conditions are needed to develop each housing type by addressing what can realistically occur in the unincorporated County compared to the municipalities.

Strategies and Action Plan

We anticipate that the strategies and actions will be around three general areas. Other strategy areas may emerge during the process as we learn more about the gaps in housing and organizational resources.

- Land use policy – The Needs Assessment will inform the FLUM and recommendations for future zoning to ensure that the types housing which are needed are allowed in the appropriate areas and supported by the necessary infrastructure.
- Partnerships and funding – Recommend how the County can support and work with the municipalities and non-profit housing organizations. Also explore how existing funding sources can be used to advance housing. We will also examine the potential for new funding sources, noting best practices in other States compared to what is authorized in Montana.
- Action Plan – The Action Plan will distill the recommendations into short-, mid-, and long-term actions. The entity best suited to each action will be identified along with potential resources needed.



Envision Gallatin

LAND USE & HOUSING STRATEGY

Land Use Profile: Annotated Outline

Draft: 12.07.23

BACKGROUND

This annotated outline provides a preview of the contents and proposed organization of the Gallatin County Land Use Profile for discussion with County staff and the Steering Committee. The Land Use Profile will be used to help inform the creation of the Gallatin County Future Land Use Map (FLUM) and Housing Strategy (HS), but will also serve as an online tool to help County staff, elected and appointed officials, partner agencies, property owners, renters, and others evaluate the context and suitability of future development following the adoption of the FLUM and HS.

The Land Use Profile will utilize data and maps assembled as part of the Gallatin County Growth Policy and Gallatin Valley Sensitive Lands Plan as a starting point, incorporating new data and supporting analysis where needed. Proposed data sources are referenced, where applicable.

The Land Use Profile will be presented in an interactive StoryMap format for ease of access, but key information will also be available in presentation form, or as a brief handout for engagement events. A tab/link to each subarea will be provided to allow users to access existing conditions and development suitability information by subarea. The default setting when accessing the StoryMap will be a countywide snapshot of existing land use and development suitability.

To be added: Explanation of the purpose of the Land Use Profile and why it is important as a supplement to the Growth Policy.

PART 1: EXISTING CONDITIONS (BY SUBAREA)

Commentary: Topics addressed in this section of the profile generally align with the Primary Criteria listed in Chapter 6 of the Growth Policy for consistency, though related topics are proposed to be combined for simplicity (e.g., Agriculture Lands/Agricultural User Facilities and Wildlife/Wildlife Habitat). New topics not addressed include Existing Land Use and Development Suitability. Information listed in this section will be provided for each subarea. Written narrative will be succinct (generally no more than a few paragraphs per topic).

About

- Context graphic (where in Gallatin County)
- Brief description of prevailing land use/development characteristics
- Brief description of boundaries/rationale for distinguishing the area

- List of topics addressed below, with short-cut links [Existing Land Use; Agricultural Lands and Agriculture User Facilities; Environmentally Sensitive Lands and Natural Hazards; Local Services and Public Facilities; Wildlife/Wildlife Habitat; and Public Lands]

Existing Land Use

- Interactive Existing Land Use Map
 - Draws from various data sources, including state cadastral data (parcel-level tax data)
 - Proposed categories listed on the following page
- Summary of existing land use by acres

Existing Land Use Categories (Proposed)

RESIDENTIAL

- Residential Single Family Large Lot (rural subdivisions on lots from 1 to 20 acres)
- Residential Single and Two Family (single-family detached homes and duplexes on lots 1 acre or less)
- Mixed Residential (townhomes, condominiums, and apartments)
- Mobile Home Parks

NON-RESIDENTIAL

- Commercial
- Industrial
- Gravel pits (overlay)

RURAL/UNDEVELOPED LANDS

- Agriculture (includes rural lots farmsteads on lots that exceed 20 acres)
- Public/Semi-Public and Tax Exempt
- State/Federal Land
- Open Space
- Conservation Easements (overlay)
- Vacant
- Other (unclassified parcels in cadastral data)

Agricultural Land and Agricultural Water User Facilities

- Interactive Map: Agriculture and Agricultural Water User Facilities (ditches, canals, etc.)
 - Draw from maps in Chapter 6 of the Growth Policy (Agriculture-Farmland; Water User Facilities – Irrigated Lands)
 - Overlay conservation easements
- Define classifications used; summarize acres by category

Environmentally Sensitive Lands and Natural Hazards

- Interactive Map: Environmentally Sensitive Lands and Natural Hazards
 - Floodplain, steep slopes, groundwater protection zones, wildlife and wildlife habitat
 - Draw from Natural Environment – Water Resources and Public Health and Safety Maps in Chapter 6 of the Growth Policy (Flood and Wildfire Hazard (WUI), Geologic Hazards)

Wildlife and Wildlife Habitat

- Interactive Map: Wildlife and Wildlife Habitat
- Draw from Growth Policy map – Wildlife Resource Value on Public Land; overlay wildlife connectivity sensitivity/data from Sensitive Lands Plan

Local Services and Public Facilities

Commentary: The Environmental Health Map on the County's current Webmap site contains extensive information about Local Services and Public Facilities (e.g., wastewater treatment systems, water supply systems). This section of the Land Use Profile will provide a discussion of these and other local services and public facilities that influence where and how growth occurs, and why they are important when considering the intensity of land uses in different areas of the County.

- Interactive Map: Local Services and Public Facilities
 - Use maps in Chapter 5 and 6 of Growth Policy as a starting point (e.g., Gallatin County Water and Sewer Districts, Local Services -Public Facilities, Local Services - Transportation)
- Brief explanation of Local Services and Public Facilities that are reflected on the map:
 - Information regarding available/planned capacity (as available)
 - References to relevant plans and studies where relevant (e.g., Big Sky CIP, MDT plans)

Public Lands

- Interactive Map: Public Lands
- Summary of acres by agency
- Brief explanation of state, federal, and other public lands; highlight areas that have a developed recreation focus (e.g., Bridger Canyon, Big Sky) that makes them more attractive to development/potential conflicts

PART 2: DEVELOPMENT TRENDS AND SUITABILITY

Commentary: Topics addressed in this section of the profile would be new (e.g., they are not addressed in the Growth Plan). Development Trends will provide a snapshot of recent development permit and subdivision activity. Development Suitability considers the Existing Conditions information outlined above, based on a [to be defined] set of ranked evaluation criteria. While users would be able to 'zoom to' individual subareas, summary information would be aggregated at a countywide level.

Development Trends

- Interactive Map: Development Trends
 - Include subdivisions by year, and nonresidential parcels (not broken out by year)
 - Draw subdivisions from Major and Minor Subdivisions Layer from Sensitive Lands Plan (page 48); apply similar methodology to extrapolate for remaining areas of County
 - Structure density map since 2003(from Sensitive Land Plan)
- Brief explanation of what's depicted on map
- Summary by development type:
 - Number of housing units, average subdivision size, average lot size, and total acres of land impacted
 - Nonresidential square feet (total) and total acres of land impacted [as derived from the cadastral data]

Development Suitability

- **Commentary:** This section reflects initial brainstorming about how a Development Suitability Map might take shape, but the map will not be included as part of the initial Land Use Profile. The map will draw from shared community values identified as part of past public outreach efforts (Growth Policy, Sensitive Lands Plan), primary criteria listed in the Growth Policy, as well as new data and information generated as part of this process. Creation of the map will be an iterative process that requires substantial input from the Steering Committee and the public. Interactive Map: Development Suitability
 - This map will provide a generalized (not parcel-based) depiction of areas in Gallatin County that are more or less suitable for development of varying intensities, based on modeling of the intersection of a set of ranked evaluation criteria.
 - Based on initial discussions with County staff and the Steering Committee, a brief memo will be prepared that outlines proposed criteria and criteria weighting. Sample criteria may include: proximity to public water and sewer, proximity to roads (state vs. county road), proximity to municipalities, presence of high priority conservation features, groundwater protection areas, etc. Generally, a shorter list of the *most* impactful criteria is selected to keep the model from becoming overly complex.