



**Transition of the  
MSU-Great Falls  
College of Technology  
Operations in the Gallatin Valley  
to  
MSU-Bozeman**

Montana Board of Regents | May 27-28, 2010



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May 27-28, 2010

## **Board Item 147-2901-R0510**

**Authorization to transition the operations of the MSU-Great Falls College of Technology in the Gallatin Valley to MSU-Bozeman**

**THAT:**

The Board of Regents authorizes the transition of the operations of MSU-Great Falls College of Technology in the Gallatin Valley to MSU-Bozeman, including all programs, personnel, services and operations effective July 1, 2010, in full cooperation with the objectives of the two-year college initiative known as *College!Now*.

**EXPLANATION:**

Recognizing the potential of two-year education to increase higher education attainment levels in Montana, the Board of Regents has engaged in *College!Now*, a multi-year initiative funded by Lumina Foundation. The objectives of *College!Now* are to expand access to the more affordable two-year education options in Montana, to coordinate programming and technology to serve more students in meeting their educational needs, and to create administrative efficiencies that will make higher education opportunities more affordable both for students and for the state. This proposal advances all three of those objectives while addressing three significant challenges faced by MSU-Great Falls College of Technology operations in the Gallatin Valley:

- a. Administrative inefficiencies that affect both the breadth and quality of services students offered.
- b. Strain on the human and fiscal resources required to provide programming in a remote location.
- c. Inability to expand programs and services in the Gallatin Valley, in spite of the needs of the community and region and the goals of *College!Now*.

With the assistance of MSU-Great Falls College of Technology, MSU-Bozeman is committed to achieving the administrative efficiencies needed to retain the student-centered, affordable, and community-responsive two-year programming MSU-Great Falls College of Technology has established in the Gallatin Valley. In the future, in collaboration with its sister campuses in Billings, Great Falls, Havre and with the support of the local community, MSU-Bozeman will develop this operation as one of Montana's

regional hubs for *College!Now*, providing its service area with affordable, high-quality developmental, transfer, and workforce programs.

**RATIONALE:**

The proposed transition of the operations of the MSU-Great Falls College of Technology to MSU-Bozeman is based on three main factors:

1. There is a demonstrated need in the Gallatin Valley for two-year educational opportunities, developmental education and workforce training and education.
2. The demand for two-year educational offerings in the Gallatin Valley exceeds MSU-Great Falls College of Technology's ability to effectively and efficiently serve the needs of the community and the region.
3. Over the last ten years, Gallatin County has been the fastest growing region in the state of Montana, with a change in population of +33.2% (+8.1% for the state of Montana).

**EXPECTATIONS:**

The following expectations related to the transition of the operations of MSU-Great Falls College of Technology are subject to review on an annual basis until May 2013:

1. MSU-Bozeman will create administrative efficiency, bringing low-cost, student-centered, community-responsive higher education opportunities to the Gallatin Valley residents.
2. MSU-Bozeman campus and leadership groups will embrace the unique identity of the two-year academic offerings, their role and impact as a regional resource.
3. MSU-Bozeman will strictly enforce Montana University System's admission standards and will work with the Office of the Commissioner of Higher Education to clarify and strengthen the standards that will maximize affordability and student success across the Montana University System, while preserving mission differentiation.
4. MSU-Bozeman will develop an integrated information system and enrollment management strategies to provide students with seamless enrollment opportunities.

5. MSU-Bozeman will play an active role in pursuing the strategies defined by Montana's two-year education initiative, *College!Now*, in order to help build a stronger two-year presence in the state.

# **Gallatin and Park Counties: A Needs Assessment Update**

## **For Two-Year Educational Programs to Serve Gallatin, Park and Surrounding Counties**

### **I. Introduction**

In 2006, through an Environmental Scanning Research Process conducted by the MSU-Great Falls College of Technology (MSU-GF COT) in Bozeman, the need was identified in the local community for additional one and two-year workforce degree programs. As we revisit this need in early 2010, we find that with the recent economic downturn and rising unemployment numbers, the need in the local area for additional workforce development programming has remained and may be greater due to the rising unemployment rate and resulting displaced workers. For this update we are focusing on the information gathered for Gallatin and Park Counties, as these are the primary service areas.

The need for expanded workforce certificate and degree programs is supported by the demographics and economic growth of both Gallatin and Park Counties. With Gallatin County having the youngest population in the state and one of the fastest growing population bases, it has a high need for these programs. Neighboring Park County has experienced a fairly flat population growth, and a more challenging employment situation. In Park County the level of education and training in the local workforce supports the need for the expansion in one and two-year education. The demographic and county economic information that is presented provides detail in these areas.

There has been strong community and business support for expanding one and two-year educational programs. These expanded workforce needs have been identified and expressed in the 2006 Environmental Scanning report, in testimony at the 11-20-2009 Board of Regents meeting, in the 2009 Bozeman Economic Development Plan, in a Bozeman Daily Chronicle poll on April 10, 2010, at the MSU-GF COT's Advisory Board meetings, and at other community meetings.

### **II. Gallatin Valley Environmental Scanning Report 2006**

In preparation for future development of two-year education in the Gallatin Valley, including services and subsequent degree and certificate programs, MSU-GF COT engaged in a comprehensive environmental scan in 2006 to assess the current and projected workforce needs of the Gallatin Valley. The results of this 2006 report are supported by the needs assessment information that has been gathered in the subsequent three years.

Three (3) primary sources of data were used for the 2006 scanning process. These included (1) Gallatin Valley High School Student Survey, (2) Gallatin Valley Workforce and Business Survey, and (3) Montana Department of Labor Workforce Statistics.



## II-a. Gallatin Valley High School Student Survey

To assess the need and interest from high school students in the services provided by a Career Center (Career Centers are high school level institutions where students from many schools can take classes to develop employment skills, while working on their high school diploma, and preparing for college) the Gallatin Valley High School Counselors surveyed students at Bozeman, Belgrade, Bridger, and Three Forks High Schools. The survey included a total of 1,733 student responses and spanned grades 9 through 12.

- When asked how important a career center was for their school district, the majority of students (1,524) thought it was either somewhat or very important.
- When asked how important a Career Center was for their own success, a majority (1,202) of students thought a Career Center was at least somewhat important to them personally. A substantial number (558) responded that it was not important.
- When asked what their plans were after high school, the majority planned to attend a 4-Year College, with a significant second stated they would enter the military. In the survey, 267 students (15% of respondents) said they were planning on attending a 2-Year College or technical school.

## II-b. Gallatin Valley Workforce Survey

Prior to developing and implementing workforce training and degree programs now available in the Gallatin Valley, the College recognized that decisions must be based on sound data and feedback from the business community. Direct input from business and industry leaders was a key first step. The survey was available on a voluntary basis to the business community during the months of June and July 2006. There were 133 different businesses that responded to the survey.

Businesses were asked to choose what vocational, technical or other training programs they would like to see available in the Gallatin Valley. The priorities of the 117 respondents were as follows:

- Computer/Networking programs-62%
- Business Management/Entrepreneurial programs-54%
- Customer Service/Soft Skills programs-50%
- Financial/Accounting programs-40%
- Construction Trades programs-31%

When asked whether or not the respondents thought the educational resources in the Gallatin Valley adequately prepare students to enter the workforce, over half (53%) stated no, while just under half (47%) indicated that they thought resources were adequate.

A follow-up question asked which areas saw the greatest need for improvement (either more programming or better programming). The High School Level was the main response at 33%, with Bachelor's Degree second at 25% and Technical School (Associate Degree Level) a close third at 21%.

### **II-c. Report Conclusions and Considerations**

The results of the 2006 Gallatin Valley Workforce and Business Survey showed that most of the businesses that responded felt there was adequate access to professional/management, some clerical, technical and sales/marketing qualified employees, even though none of these categories rated excellent. However, there were indications that access to some Clerical, most Skilled, Semi-Skilled, and Unskilled workers was very inadequate. In fact, many businesses (nearly 70%) said they were experiencing difficulties recruiting employees with adequate skills, and of those respondents, 30% were experiencing an inability to expand, 26% a decline in service quality, and 26% a decrease in productivity.

Compounding this issue, of the students (from Belgrade, Bozeman, Three Forks, and Bridger) who responded to the Gallatin High School Survey, 267 of them (about 15%) said they were going to a 2-year College/Technical school when they graduate. These institutions provide much of the programming needed to build a skilled workforce, however Bozeman and the surrounding area is the only major community in Montana without one of these institutions. So that means that 267 students are leaving the Bozeman area to go to a 2-Year or technical college, many of which may not return to the Valley. Looking at stated projections and the Department of Labor statistics for occupational growth, there will be a significant demand and growing workforce in the Valley. Identified by the respondents, the areas where most growth was anticipated is in the Technical, Skilled and Unskilled areas, and this is mirrored by the projections by the Department of Labor. Respondents reported shortages in many areas, such as Construction, Computer Technology, Medical, Sales, Management and Services.

### **II-d. Interest, Demand and Need for Technical Programming**

Conclusions drawn above relating to the interest of high school students in both career center and technical education during and after high school, the lack of these opportunities in the Gallatin Valley, the growing demand and shortage of the workforce typically prepared by this type of education, all provide endorsement for the decision to transfer the operations of MSU-GF COT to MSU-Bozeman. With this knowledge, and the results of the scanning process, the following are considerations for programming options to explore and possibly develop for the Gallatin Valley:

Construction Trades—549 or 31% of the students surveyed said they would be interested in building and construction programming.

- Culinary Arts—585 or 33% of the students surveyed said they would be interested in culinary arts programming.

- Office and Administrative Specialists—Responses from the workforce and business survey referred to the need (both current and projected) for qualified administrative (clerical or semi-skilled) employees.
- Computer Information Technology—413 or 23% of the students surveyed said they would be interested in computer information technology programming and 62% of the businesses who responded to the workforce and business survey stated they would like to see computer/networking programs offered in the Valley.
- Business Management—54% of the businesses who responded to the workforce and business survey stated they would like to see business management/entrepreneurial programming offered in the Gallatin Valley.
- Early Childhood Education—423 or 24% of the students surveyed said they would be interested in Early Childhood Education programming.
- Automotive Service Technology—606 or 34% of the students surveyed said they would be interested in auto repair and refinishing programming.
- Medical and Healthcare—528 or 30% of the students surveyed said they would be interested in Health Services programming such as nursing, EMT, medical assistant and others.

### **III. Community Profile 2010**

Located in southwestern Montana, the Gallatin and Park County region is one of the fastest growing economic areas in the northern Rocky Mountains. It has a varied economic base; an educated workforce; thriving technology and manufacturing industries; a major research university; plentiful cultural and outdoor recreation amenities; and a scenic natural landscape at the doorstep of Yellowstone National Park.

#### **III-a. About Gallatin County**

Gallatin County, with its county seat in Bozeman, covers a land area of 2,606 square miles and has a population density of 34 people per square mile. Located in a valley bearing the same name, Gallatin County is the most populated and fastest growing county in southwest Montana. According to recent estimates, Gallatin County is the fastest growing county in Montana and recently became the 3<sup>rd</sup> most populated county in the state.

With its Rocky Mountain setting, it is close to Yellowstone National Park (the park's western entrance is located in the southeastern portion of the county), world-class downhill skiing (Big Sky Resort, Moonlight Basin and Bridger Bowl), blue ribbon trout streams and a multitude of other outdoor activities. Nearly half of all the land in the county is under public ownership by the Gallatin National Forest, State of Montana, Bureau of Land Management or the National Park Service. Gallatin County is large and diverse, with rich agricultural lands and diverse economy of technology and manufacturing industries.

#### **III-b. About Park County**

Park County, with its county seat in Livingston, covers a land area of 2,802 square miles and has a population density of 5 people per square mile. Park County is Montana's 12<sup>th</sup> most populated. Park County was established in 1887 and named for its proximity to Yellowstone National Park. With its location at the northern entrance to "the Park" (as it is referred to by locals), and the Yellowstone River flowing through it, Park County's economy is concentrated in tourism and recreation-related services. Park County has a rich ranching and railroad heritage, and is well-known for fly-fishing and hunting.

### **IV. Population**

According to 2009 U.S. Census Bureau population estimates, Gallatin County currently has a population of 90,343 and its county seat, Bozeman, has 39,442 residents. Park County's population is 16,189 and its county seat, Livingston, currently has 7,500 residents. The combined population of Gallatin and Park Counties is 106,013, or 11% of the state's population.

The U.S. Census Bureau's 2008 County Population Estimates shows the continuing trend of population growth concentrated in western and southwestern Montana. While the state population grew at a rate of 7.2% from 2000 to the 2008 Census estimates, 36 counties

experienced declining populations over the same period. Concentration occurred as 20 counties increased in population and only 11 counties grew faster than the state rate of 7.2% Census figures show that Gallatin County grew by 33% between 2000 and 2009.

Population	2001	2002	2003	2004	2005	2006	2007	2008
State of Montana	905,854	909,859	916,754	925,969	934,888	945,428	956,624	967,440
Gallatin County	70,170	71,967	74,689	77,408	80,671	84,370	87,243	89,824
Belgrade	6,414	6,746	7,046	7,298	7,336	7,631	8,036	8,185
Bozeman	29,261	30,372	31,919	33,663	35,089	37,038	38,037	39,442
Manhattan	1,428	1,438	1,480	1,519	1,511	1,555	1,539	1,622
Three Forks	1,761	1,789	1,853	1,919	1,903	1,923	1,915	1,928
West Yellowstone	1,193	1,216	1,241	1,262	1,260	1,281	1,433	1,511
Park County	15,691	15,746	15,623	15,616	15,750	15,845	16,072	16,189
Clyde Park	310	310	328	331	343	342	346	347
Cooke City	140 in 2000 (U.S. Census Bureau); most recent numbers available							
Gardiner	851 in 2000 (U.S. Census Bureau); most recent numbers available							
Livingston	7,040	7,090	7,058	7,062	7,131	7,253	7,409	7,500
Wilsall	237 in 2000 (U.S. Census Bureau); most recent numbers available							

Source: U.S. Census Bureau.

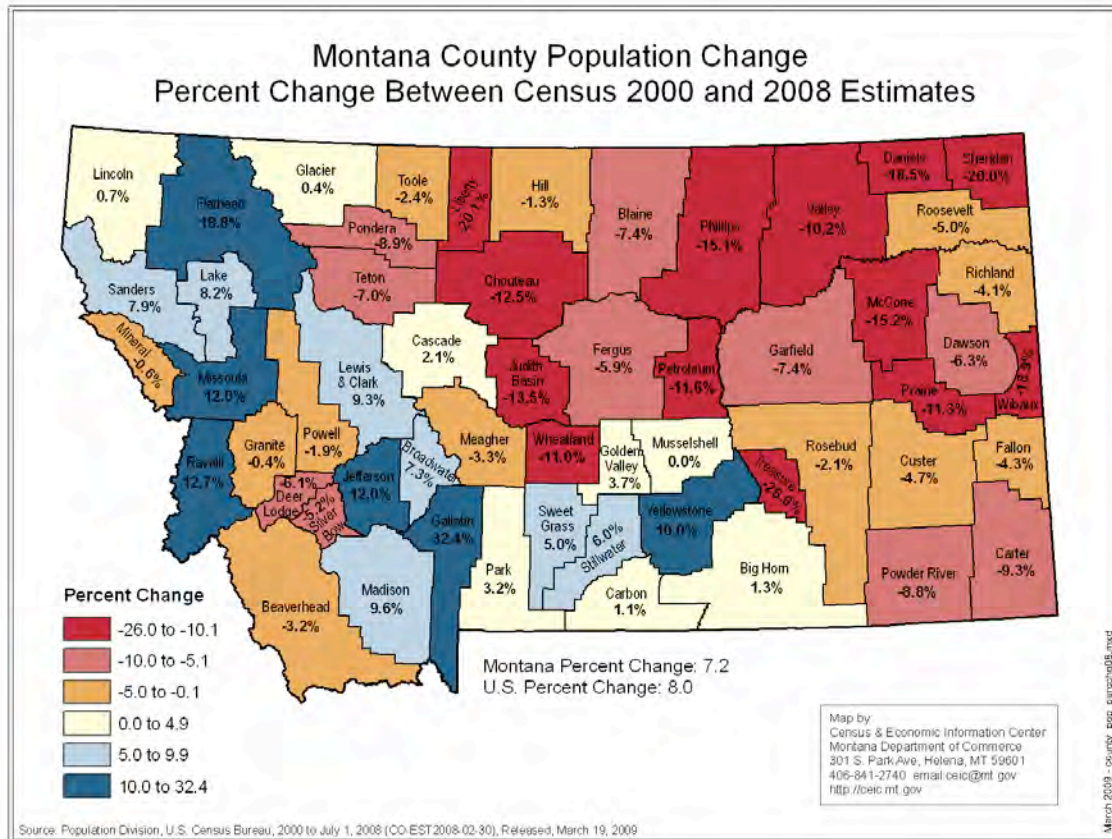
The chart below shows the population ranking of the 7 largest cities in Montana in 2008.

City	Rank	2008
Billings	1	103,994
Missoula	2	68,202
Great Falls	3	59,251
Bozeman	4	39,442
Butte	5	32,119
Helena	6	29,351
Kalispell	7	21,182

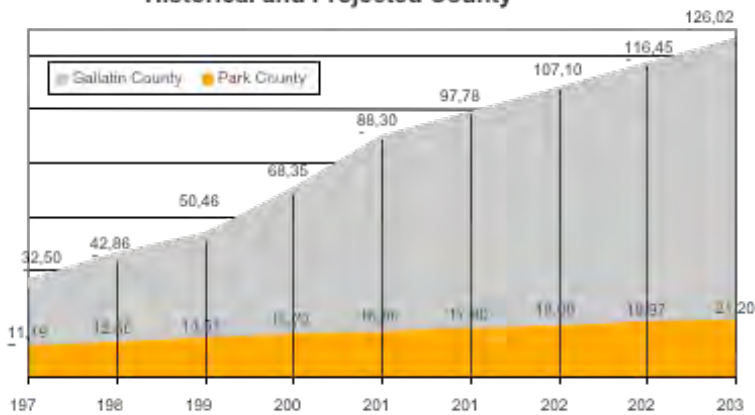
Source: U.S. Census Bureau.

Gallatin County is the fastest growing county in the state, with its population increasing 32.4% since Census 2000. Gallatin County appears in the U.S. Census Bureau's 2007 "100 Fastest Growing Counties" list—at #88, and is now the 3<sup>rd</sup> largest county in Montana at 90,343.





### Historical and Projected County



Source: US Census Bureau, 1970-2000

## V. Demographics

The age of the residents of Gallatin County is significantly younger than the rest of the state. This is primarily due to the younger populations that reside in Bozeman and Belgrade. The rest

of Gallatin County has an age disbursement similar to the rest of the state. Park County's age distribution is slightly older than the state average.

Age	Median Age	Under 5 Years	18 and Over	65 and Over
Montana	*39.3	*70,008	**727,082	*137,312
Gallatin County	*32.4	*6,085	**66,052	*7,830
Belgrade	29.1	502	4,024	347
Big Sky	34.3	62	1,034	83
Bozeman	27.2	2,227	29,756	2,496
Manhattan	38.1	82	1,024	183
Three Forks	37.5	118	1,238	259
West Yellowstone	37.0	64	913	62
Park County	*40.6	*820	**11,999	*2,500
Clyde Park	42.7	15	237	50
Cooke City	43.4	3	128	14
Gardiner	39.3	43	674	66
Livingston	40.3	381	5,295	1,272
Wilsall	43.9	15	181	47

Source: U.S. Census Bureau, 2000 data. \*Source: Montana Department of Commerce, 2008

\*\*These numbers are derived from U.S. Census 2005-2007 estimates, 2008 n/a.

The racial makeup of residents of Gallatin and Park Counties is slightly less diverse than the rest of the state.

Race	Montana	Park County	Gallatin County
White Non-Hispanic	90.5%	93.8%	93.4%
Black	.7%	.5%	.7%
Hispanic or Latino (of any race)*	3.0%	3.8%	5.1%
American Indian & Alaskan Native	6.4%	1.8%	1.2%
Two or more races	1.7%	3.2%	2.9%

Source: U.S. Census Bureau, 2008

Income	Median Household	Median Family	Per Capita Personal	Individuals Below Poverty Level	Families Below Poverty Level
Montana	\$43,000	\$52,357	\$34,256	14.0%	9.3%
Gallatin County	\$50,511	\$60,931	\$25,829	12.3%	6.2%
Belgrade	\$37,392	\$40,378	\$15,266	11.4%	n/a
Big Sky	\$39,688	\$62,750	\$31,492	6.2%	n/a
Bozeman	\$42,972	\$57,902	\$23,387	19.5%	9.0%
Manhattan	\$38,242	\$45,521	\$17,024	7.1%	n/a
Three Forks	\$31,212	\$39,938	\$15,362	7.7%	n/a
West Yellowstone	\$30,703	\$37,250	\$19,136	12.9%	n/a
Park County	\$40,173	n/a	\$32,140	11.4%	n/a
Clyde Park	\$28,194	\$35,278	\$15,646	10.0%	n/a
Cooke City	\$25,000	\$50,625	\$31,618	15.8%	n/a
Gardiner	\$30,125	\$46,071	\$17,810	8.2%	n/a
Livingston	\$28,980	\$40,505	\$16,636	12.1%	n/a
Wilsall	\$29,643	\$30,357	\$14,585	17.9%	n/a

Source: U.S. Census Bureau, 2000

The education level of residents in Bozeman and Big Sky runs above the statewide average while the rest of Gallatin County is slightly below the state average and Park County falls considerably below the statewide average.

Education	High School or Above	Bachelor's or Above
Montana	90.0%	45.5%
Gallatin County	95.2%	45.5%
Belgrade	93.2%	27.3%
Big Sky	97.9%	46.8%
Bozeman	96.1%	53.7%
Manhattan	87.5%	29.5%
Three Forks	89.5%	16.7%
West Yellowstone	87.0%	28.2%

Education	High School or Above	Bachelor's or Above
Park County	87.6%	23.1%
Clyde Park	80.9%	14.5%
Cooke City	75.4%	23.7%
Gardiner	94.0%	28.8%
Livingston	85.0%	20.0%
Wilsall	84.6%	14.7%



## VI. Economic Growth and Employment

Gallatin and Park Counties have a diverse economy comprising such industries as manufacturing, construction, government, healthcare, technology, retail, service, agriculture, and tourism. Economic growth in Gallatin County has been especially strong during the past 10-years, up to the recent recession that started in 2008. Park County's economic growth has been more modest over the same time period. The construction, retail, service and mining industries of Gallatin and Park Counties have been the industries most impacted by the current recession.

### VI-a. Economic Strength Rankings-2008

The economic strength rankings are created to study the characteristics of strong and weak economies. The highest ranked areas (lower numbers) have had rapid, consistent growth in both size and quality for an extended period of time. The lowest ranked areas (higher numbers) have been in decline for an extended period of time.

The following chart lists the economic strength rankings (conducted for 577 locations nationwide) for the listed Micropolitan Statistical Areas or Micros (population between 10,000 and 50,000).

Micropolitan Areas	2004	2005	2006	2007	2008
Bozeman, MT	9	9	10	8	8
Helena, MT	37	14	7	23	13
Kalispell, MT	201	134	103	63	51
Butte-Silver Bow, MT	376	286	191	123	67

Source: Policom

An analysis of employment data shows the diversity of industries in the local economies. It also shows the prominent position of the construction industry, which has shown significant job losses since this data was collected. From June 2007 to June 2009, there was a 40% decline in construction employment in Gallatin County according to the Bureau of Business and Economic Research (BBER). Employment in retail businesses declined 11% from March 2008 to March 2009, according to the BBER.

2008 Employment			
Sector	Gallatin/Park County Number of Establishments	Gallatin/Park County Average Annual Employment	Gallatin/Park County Average Weekly Wages
Total Government (includes MSU)	102/41	7,374/729	\$761/\$641
Retail Trade	572/107	7,275/770	\$477/\$425
Construction	1,101/149	5,146/503	\$786/\$659
Accommodation & Food	360/108	5,585/1,184	\$267/\$288
Health Care & Social Assistance	343/39	3,587/645	\$708/\$679
Professional & Technical Services	729/75	3,422/189	\$1,057/\$727
Manufacturing	197/30	2,577/303	\$710/\$801
Other Services	361/70	1,511/385	\$485/\$421
Wholesale Trade	201/16	1,401/35	\$793/\$880
Finance & Insurance	219/31	1,259/172	\$974/\$715
Recreation, Arts & Entertainment	139/58	1,276/230	\$408/\$454
Information	86/20	650/83	\$750/\$894
Education	63/12	537/95	\$320/\$416
Ag, Forestry, Fish & Hunt	71/37	432/163	\$520/\$515

Source: Montana Department of Labor and Industry

## VI-b. Employment by Sector

Both Gallatin and Park Counties have diverse employment bases which set them apart from many other communities in Montana. In fact, Gallatin County was ranked 4<sup>th</sup> among all micropolitan areas (urban area with a population of less than 50,000 and at least 10,000) in the Rocky Mountain region for Balanced Employment Composition<sup>1</sup> in 2004.

Gallatin County provides jobs for over 45,839 people while Park County employs 5,760. Primary industry employers are retail trade, accommodation and food services, and construction.<sup>2</sup>

<sup>1</sup> Colorado College State of the Rockies Report Card

<sup>2</sup> Montana Department of Labor & Industry, Research & Analysis Bureau, annual 2008 data

## VI-c. Technology

Home to more than 100 technology-based firms, the Gallatin Valley has become the high-tech center of Montana; and it is one of the largest technology communities in the northern Rocky Mountains. The local technology sector has grown significantly since the early 1990's. A 1994 report on high-tech clusters in Montana by the Federal Reserve Bank of Minneapolis cited just eight companies engaged in research or production of laser optic equipment and only 12 in biotech in the Gallatin Valley. Today, there are an estimated 20 firms engaged in laser optics and an estimated 33 firms engaged in biotech.

Bozeman's technology sector now includes firms engaged in advanced manufacturing (an estimated 26 firms) and laser optics (an estimated 20 firms); information technology—

application development, information technology services, software, Internet applications, telecom, etc (an estimated 50 firms); biotech or bioscience (an estimated 33 firms); and agricultural, environmental, or miscellaneous activities (an estimated 14 firms). These firms for the most part are selling their goods and services entirely to customers located outside of Montana and many located outside of the U.S. These firms directly employ an estimated more than 3,000 individuals whose earnings are significantly higher than the country's annual wage of about \$32,000.

#### **VI-d. Retail**

Gallatin Valley's retail sector has experienced significant growth in recent years. Retail is now Bozeman's second largest employment sector. With the arrival of several national retail chains, including "big box stores," Bozeman is now a regional retail hub, attracting shoppers from many of the surrounding counties. Prior to the arrival of stores such as The Home Depot; Lowe's Home Improvement; Bed, Bath & Beyond; and World Market, many people drove to Billings to shop at these stores. The influx of additional shoppers has considerable economic impact on other retail and service sector businesses. In addition to the national retail chains, Gallatin and Park counties have a strong independent retail business environment.

#### **VI-e. Hospitality, Tourism and Recreation**

The hospitality, tourism and recreation sector is a major component of the local economy. The Bozeman Area Chamber of Commerce estimates that the direct impact of tourism on the Gallatin Valley economy is more than \$600 million annually, with more than 1 million visitors traveling through Bozeman each year. Tourism is one of the fastest growing sectors of Montana's economy, according to the Montana Department of Commerce.

#### **VI-f. Construction, Land Development and Real Estate**

The construction, land development, and real estate sector has been a significant component of Bozeman's economy. Without a doubt, the construction and real estate boom leading up to 2005-2006, and its subsequent decline (a 70% decline in housing starts from 2006 to 2009), have had a strong impact on the Bozeman area economy. Everything from building contractors, subcontractors, and trades; building materials suppliers, home furnishings, and landscaping; to realtors and financial institutions are impacted by the construction industry in Bozeman.

#### **VI-g. Manufacturing**

Gallatin and Park counties manufacturing sector includes an estimated 238 firms engaged in a diverse range of activities including the production of: wood furniture; athletic gear and apparel; pet toys and products; food and beverage; printed materials; fabricated metal products; and computer and electronic products. Many of these firms sell products around the country, with an increasing number that have started exporting their products around the world.

### **VI-h. Healthcare and Health Services**

The Healthcare sector in the area is a significant economic contributor. The Montana Department of Labor broadly categorizes healthcare employment under a category titled Health Care and Social Assistance. In 2007, Gallatin Valley had 330 businesses that provided these services through 3,355 employees. This makes the Healthcare and Social Assistance category the 5<sup>th</sup> largest employment category in Gallatin County behind Accommodation and Food Services, Construction, Retail Trade and Government. The average salary of employees in the Health Care and Social Assistance category was \$35,043 in 2007.

### **VI-i. Finance and Professional Business Services**

Bozeman's finance and professional services sector has experienced tremendous growth in the last 10 years. According to Montana Department of Labor and Industry data from 2007, the finance & insurance and the professional & technical services sectors employ 4,558 people in Gallatin County (a 74% increase since 1999). While Park County has also experienced growth in this sector, it is at a lesser pace. There are an estimated 1,054 business establishments in these two sectors in Gallatin and Park Counties.

### **VI-j. Gallatin Field Airport**

While Gallatin Field does not represent an industry sector, it has become a major regional airport and plays a critical role in the economic growth of Gallatin and Park counties. It is now the second busiest airport in the state, with airline service providing non-stop flights to 11 cities in 10 states. Since 1992, passenger enplanements have increased by 127%, making Gallatin Field the fastest growing airport in Montana and the 7<sup>th</sup> busiest airport in the Pacific Northwest region. The airport is in the process of a major terminal expansion. A record number of passengers (702,495) boarded or deplaned from scheduled commercial airline flights in 2008, up 4.5% over the previous record set in 2007. In 2009, however, with the economic recession, the number of passengers using the airport started to slow with passenger enplanements, decreasing to closer to 2007 passenger levels. Increased passenger growth is optimistic for 2010 and years to follow.

The following table lists the 20 largest private sector employers in both Gallatin and Park Counties by alphabetical order.

20 Largest Private Sector Employers	Number of Employees
Gallatin County (in alphabetical order)	
Bozeman Deaconess Hospital	1000+
Albertson's	250-499
RightNow Technologies	250-499
Wal-Mart	250-499
Zoot Enterprises	250-499
Bozeman Daily Chronicle	100-249
Community Food Co-Op	100-249
Costco	100-249
First Security Bank	100-249
JTL Group Inc.-Belgrade	100-249
Kenyon Noble Lumber & Hardware	100-249
Laidlaw Transit	100-249
Martel Construction	100-249
McDonald's	100-249
Murdoch's Ranch & Home Supply	100-249
On Site Management	100-249
Ressler Chevrolet Cadillac & Toyota	100-249
Riverside Country Club	100-249
Simkins-Hallin Lumber	100-249
Williams Plumbing & Heating	100-249
Park County (in alphabetical order)	
Livingston Healthcare	250-499
Chico Hot Springs	100-249
Church Universal & Triumphant	100-249
PrintingForLess.com	100-249
Albertson's	50-99
Best Western Mammoth Hot Springs	50-99
Community Health Partners	50-99
Crazy Mountain Ranch	50-99
Evergreen Healthcare	50-99
Mountain Sky Guest Ranch	50-99

Source: Montana Department of Labor & Industry, Research & Analysis Bureau, 2008 second quarter data

## VII. Local Workforce

Even with recent increases in unemployment, comparatively, Montana has experienced one of the lowest unemployment rates in the nation. At the end of February 2010, Montana's non-seasonally adjusted unemployment rate was 8.1%. The national unemployment rate was 9.7% in February 2010. The chart below shows the unemployment rates for both Gallatin and Park counties.

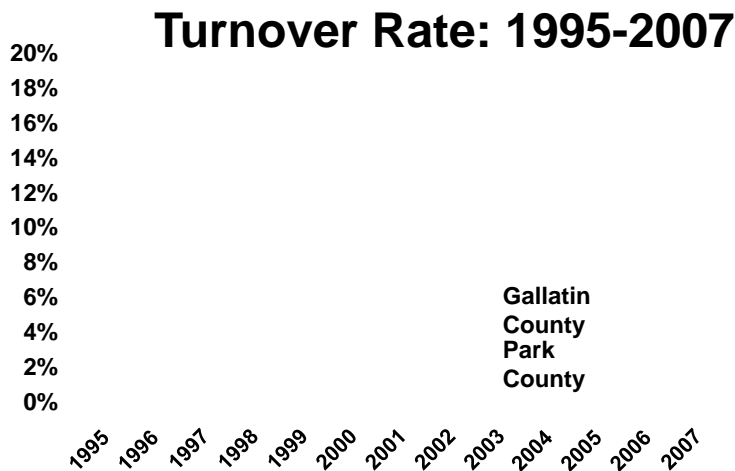
February 2010 County Unemployment Rate Rankings	
Non-Seasonally Adjusted *(p)	
County	Rate
Yellowstone County	6.2
Lewis And Clark County	6.0
Madison County	7.1
Missoula County	7.9
Gallatin County	7.6
Park County	9.2
Flathead County	13.3

Source: Montana Department of Labor and Industry

Out of the 56 Montana counties, Park County had the 14<sup>th</sup> highest unemployment rate in February 2010. Gallatin County had the 19<sup>th</sup> highest unemployment rate in February 2010.

**VII-a. Job Turnover in Montana**

Job turnover measures the change in workers entering and leaving the labor force as a percentage of stable employment. It is an important variable because it shows the flexibility of an economy and its ability to reallocate workers and jobs. The chart below quarterly turnover rates from 1995-2007. Though there is some fluctuation in the rate, it has remained within a relatively tight range over the past twelve years.

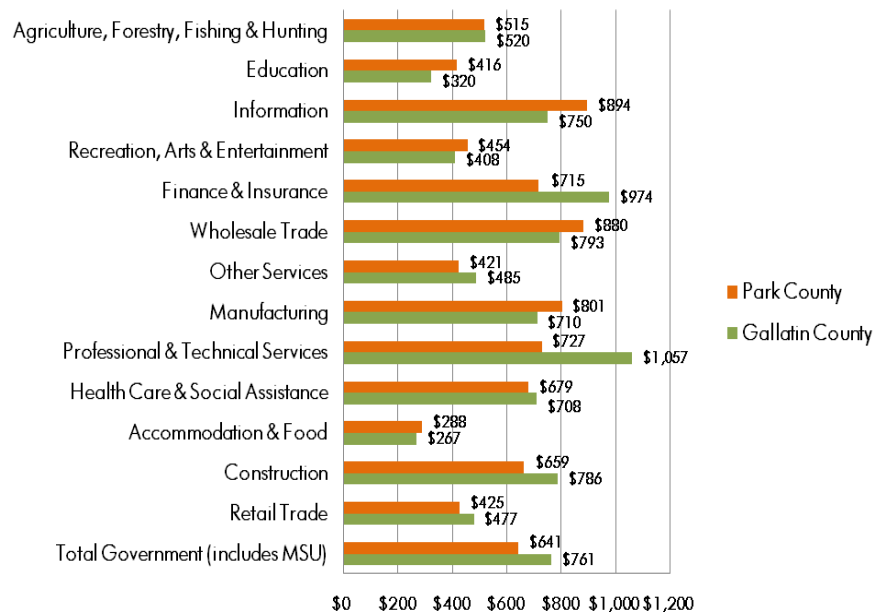


Source: Montana Department of Labor & Industry, Research & Analysis Bureau

**VII-b. Salary & Wage Detail**

The data below indicates weekly wage amounts reported by industry businesses over the course of the 2008 year. Dominating wage distribution in Gallatin County is professional and technical services. In Park County, the distribution is stemming from the information and communication field.

### 2008 Average Weekly Wages by Industry



Source: Montana Department of Labor & Industry, Research & Analysis Bureau

In a comparison of average annual wages by county, Gallatin County comes in very close to the state average. The average annual wages in Park County are 14% below the state average.

Montana's 2008 Annual Average Wage by County: All Industries		
County	Annual Wage	Weekly Wage
Lewis and Clark County	\$36,746	\$707
Yellowstone County	\$36,513	\$702
Silver Bow County	\$34,495	\$663
Missoula County	\$33,425	\$643
State Average	\$33,303	\$640
Gallatin County	\$33,169	\$638
Flathead County	\$32,131	\$618
Cascade County	\$31,965	\$615
Park County	\$28,521	\$548
Madison County	\$27,140	\$522



Gallatin County ranks 12<sup>th</sup> in the state for annual average wages by county.

2008 Montana's Top 15 Counties Ranked by Annual Average Wages				
Ranking	County	Total Employment	Total Wages	Total Annual Average Wage
n/a	Statewide	436,695	\$14,071,645,084	\$33,303
1	Stillwater	3,357	\$145,050,259	\$43,208
2	Sweet Grass	1,705	\$73,428,751	\$43,067
3	Fallon	1,352	\$57,925,929	\$42,845
4	Rosebud	4,292	\$169,767,805	\$39,554
5	Richland	4,944	\$185,188,953	\$37,457
6	Lewis & Clark	34,688	\$1,274,636,761	\$36,746
7	Yellowstone	77,835	\$2,842,004,725	\$36,513
8	Silver Bow	15,754	\$543,433,279	\$34,495
9	Toole	2,154	\$72,598,740	\$33,704
10	Big Horn	4,494	\$150,515,367	\$33,493
11	Missoula	55,463	\$1,853,860,632	\$33,425
12	Gallatin	45,839	\$1,520,429,437	\$33,169
13	Powell	2,277	\$74,918,744	\$32,902
14	Flathead	41,235	\$1,324,935,570	\$32,131
15	Cascade	35,740	\$114,2431,993	\$31,965

Source: Montana Department of Labor & Industry

## VIII. Underserved Local Population

### VIII-a. High School Graduates

High school officials from both Gallatin and Park Counties have consistently voiced the need for additional one and two-year educational offerings in the area. The concern expressed is that their graduating students that are not enrolling at a four-year university are faced with the challenge of managing a 1-1/2 hour commute or relocation to attend a two-year college. These obstacles often result in many of these students not pursuing additional educational opportunities and entering the workforce right out of High School.

Gallatin County High School Graduates 2007-2008 (Belgrade, Bozeman, Manhattan, Three Forks, West Yellowstone & Willow Creek High Schools)

- 33% of Graduates enroll in MUS fall semester after graduation
- 23% enroll in at least one remedial math or English course
- 75% of recent graduates return for a second year of enrollment in the MUS (2006-2007 data)

Park County High School Graduates 2007-2008 (Park County, Gardiner & Shields High Schools)

- 34% of Graduates enroll in MUS fall semester after graduation
- 27% enroll in at least one remedial math or English course



- 80% of recent graduates return for a second year of enrollment in the MUS (2006-2007 data)

*Source: Montana University System*

In our discussions with the High School Officials it is hard to determine exact numbers of high school graduates that would be candidates for expanded one and two-year educational offerings. The challenges of conducting post High School graduation follow-up surveys makes it difficult to provide firm numbers. At the same time, the High School officials we talked to were confident that their estimate of a potential cohort of students for one and two-year education was reasonable, given their historical experience. The collective estimate is that there would be 228 students that would graduate each year and be potential students for an expanded two-year college.

### Local High School Graduate Information

School	Average Graduation class	Annual Estimate # of Graduates going to Four Year University	Annual Estimate # of Graduates working or attending two-year College
Bozeman High School	345	260	74
Belgrade High School	190	106	62
Manhattan High School	55	30	20
Other Gallatin High Schools	77	42	35
Park County High Schools	156	82	55
Total	823	520	246

### VIII-b. Displaced Workers

The number of displaced workers is evidenced by the rising unemployment numbers (non-seasonally adjusted) in Gallatin County which hit 7.6% in February 2010, the 19<sup>th</sup> highest unemployment rate among Montana's 56 counties. Park County's unemployment rate (non-seasonally adjusted) hit 7.9% in February 2010, which was the 14<sup>th</sup> highest rate among Montana Counties. These rising unemployment rates and the number of companies that have conducted rounds of layoffs have created an increasing number of non-traditional workers that could use the services of additional one and two-year programs. During the past 18-months of the current recession, noteworthy layoffs have occurred at Printing for Less, the Bozeman Daily Chronicle, Stillwater Mine, CDI Aerospace (transferred their operation out of state), the Yellowstone Club, a number of construction companies and construction related businesses that significantly downsized or went out of business and a variety of other small businesses that shrunk their workforce.

The experiences from our local job service representative that leads the Workforce Investment Program have shown that Gallatin and Park Counties have a well-educated work force, but one which is not particularly well trained for specific job opportunities. The local representative expressed the following opinion:

*There is a great need in the local region for a very specific link to be made between high schools, a centralized vocational technical school and MSU. Many areas in Montana as well as other states and countries do this quite well- even beginning to test for and provide specific training in vocational specialties as early as middle school and certainly by high school. This allows those not desiring or destined to pursue academic careers to be trained in areas of choice which allow them to earn a self-sufficient wage in an area of strong aptitude by age 18-20. Many of these will be homeowners and practicing professionals by their mid-twenties. This is in stark contrast to the system of either obligatory and often unfocused 4-year university training or practically unguided vocational wandering after high school. This is too often followed, at age 25-30, by the need for more focused training after these individuals are married with children and are working in boom/bust type jobs with little ability to drop everything to pursue training.*

Source: Bozeman Job Service Representative

Of approximately 60 people served with Workforce Investment Act funded training dollars through the Bozeman Job Service Workforce Center in the past year, fully 53% of them pursued this training either out of state (15%) or at a distance of over 50 miles away (38%- Great Falls, Butte, Billings, Helena). Local short-term training, normally between five and eighty hours, has been pursued by 25% of participants and 18% were MSU-Bozeman juniors and seniors who we are helping to finish 4-year degrees. The remainder are participants helped to relocate to work out of area or out of state.

## **IX. Bozeman Economic Development Survey and Plan**

In August of 2009 the Bozeman City Commission approved an economic development plan to guide economic development activities for the City. The plan that was approved was the result of a nine month process that included an extensive survey of over 220 business leaders, community officials and citizens on a variety of economic development issues. The economic development project was managed by an oversight committee of twelve business and community leaders. The results of the survey and the accompanying economic development plan provide strong support for the development of additional one and two-year education programs.

As part of the economic development survey, respondents were asked to rate the need for the City to support fifteen potential economic development initiatives. On a scale of 1-4, with 1=no need and 4=high need, the fifteen initiatives were rated. The third highest rating (tied with additional business financing needs) was for Expanded Vocational and Certification Job Training Programs. The respondents (both business leaders and community members) clearly prioritized this need as it rated higher than perennial economic development favorite initiatives like the need to improve the City's infrastructure, expanding the transportation system, building a convention center and others.

In the economic development plan's SWOT analysis the issue was also raised. The report states that one of the economic weaknesses is the limited 2-year college degree, training and certification programs.

In the goals and strategies section of the report there is additional support and direction for activities to support the development of additional two-year education programming. The specific goals and recommended strategies are as follow:

- Goal 3: Support education and workforce development initiatives to provide Bozeman with the qualified workers to meet the needs of business.
- Strategy 3-a: Support the efforts of Montana University System to expand two-year degree and job training and certification programs in Bozeman.
- Strategy 3-d: Encourage MSU in Bozeman, Bozeman Job Service and the Bozeman School District to develop and maintain continuing education and certification programs for high-demand jobs.

## **X. Community Support**

The need for the development of one and two-year workforce certificate and degree programs has been discussed on the local level for many years. Business leaders, community leaders, elected officials, educators and potential students have all expressed this desire in a variety of formats. Economic development surveys and reports have provided specific survey data that shows the need for these programs locally.

The Board of Regent's heard these needs expressed at their November 20, 2009 meeting at Montana State University. The educational needs of potential students and the employment needs of businesses were passionately raised by those giving testimony. At the November meeting, the City of Bozeman presented a resolution that was unanimously passed by their commission, to support the request by Montana State University to assume responsibility for two-year educational programs in Gallatin Valley, with the goal of expanding these programs. Following the November meeting, there were a number of editorials written which supported the MSU proposal. On April 10, 2010, the *Bozeman Daily Chronicle* released the results of an online poll that showed 77% of respondents supported the MSU two-year proposal and 23% did not support the initiative.

Since the start of the MSU-GF COT operation in Bozeman, the employees have experienced a high level of support from the community for their program development efforts. The MSU-GF COT has had an active and involved advisory board and enjoyed positive working relationships with local schools, elected officials, business leaders and other community leaders.

**Acknowledgements**

In addition to the sources cited in this document, a special thanks goes to Prospera Business Network, Bozeman Area Chamber of Commerce, the City of Bozeman, Bozeman Area Job Service, and a number of school officials from Gallatin and Park Counties for providing information and data for this report.

## MSU-Great Falls College of Technology in Bozeman: Student Data

### Enrollment, Programs, Academic Success, and Demographic Information

MSU-Great Falls College of Technology (MSU-GF COT) began offering developmental Math courses in Bozeman in 2004. Developmental Writing courses, as well as the Associate of Applied Science (AAS) degree in Aviation began in 2005. The AAS degree in Interior Design and Certificate of Applied Science (CAS) program in Welding began in fall 2007. The AAS degree in Design Drafting began in fall 2009.

### Student Enrollment

The following chart illustrates the student enrollment, for each program, starting in the academic year 2005-2006 and culminating in the academic year 2009-1020:

Academic Year	Annual FTE	Fall				Spring			
		Develop. FTE	Develop. HC	Workforce FTE	Workforce HC	Develop. FTE	Develop. HC	Workforce FTE	Workforce HC
2009-10	229	224	681	66	95	105	363	59	86
2008-09	199.2	194	573	57	90	78.4	278	60.8	93
2007-08	188.77	202	565	41	75	76.3	272	45	64
2006-07	142.3	165	495	13	39	83	288	17	64
2005-06	100.8	111.5	381	7.2	18	65	233	12.3	23

### DEFINITIONS

*HC: Headcount*

*Annual FTE: Fall + Spring + Summer FTE ÷ 2 (average FTE over two semesters)*

*Developmental students: all students enrolled in developmental Math, Writing, and study skills courses;*

*Workforce students: all students enrolled in CAS and AAS programs (Welding, Interior Design, Aviation, and Design Drafting);*

### I. Developmental Education and Pre-University Studies

MSU-GF COT began offering developmental Math courses in fall 2004. The following year (Fall 2005) MSU-GF added developmental Writing and College Studies courses. Since 2005, the number of sections has continued to grow. The growth is primarily attributed to an increasing number of students selecting MSU-GF COT courses for developmental Math (rather than tutor-assisted, self-paced courses taught by MSU-Bozeman) and creation of mandatory placement measures for developmental Writing.

All developmental courses offered by MSU-GF COT in Bozeman are taught by full-time or adjunct faculty hired directly by the COT and who are committed to developmental teaching practices. Developmental courses taught in Bozeman include level I and II Math, level I and II Writing, and Effective Academic Practices (study skills). Study skills courses are capped at 17 students, developmental Writing and Math Level I are capped at 20 students, and

developmental Math Level II is capped at 30 students. The fall 2008 semester was selected as a representative sample for data.

### Background of fall 2008 developmental students:

Total students: 752

Montana residents: 553 (74%)

Out-of-state students: 199 (26%)

Gallatin County residents: 167 (30% of resident students)

Pre-University Studies students		All other developmental students		MSU regular admit freshmen	
High School GPA	2.6	High School GPA	2.93	High School GPA	3.28
ACT Composite	16.1	ACT Composite	18.7	ACT Composite	24

#### DEFINITION

*Pre-University Studies students are admitted to MSU as part-time students on academic probation. Students are restricted to 7 MSU credits in their first semester, and limited to 14 total credits by taking developmental coursework from the COT. Students are advised by the MSU-GF COT using an intrusive advising philosophy.*

### I-a. Success Rates in Developmental Education

The following chart illustrates the success rates for development coursework for MSU-Bozeman students for the fall semester of 2008.

(Total: 626 students)

Course	Success
Level I Math (M 065) Pre-Algebra	66%
Level II Math (M 096) Intro Algebra	77%
Level I Writing (WRIT 080)	71%
Level II Writing (WRIT 095)	85%

### I-b. Success Rates for Pre-University Studies

The following chart illustrates the success rates for development coursework for students enrolled in Pre-University studies for the fall semester of 2008.

(Total 126 students):

Course	Success
Level I Math (M 065) Pre-Algebra	54%
Level II Math (M 096) Intro Algebra	67%
Level I Writing (WRIT 080)	54%
Level II Writing (WRIT 095)	76%
COLS 100 Effective Academic Practices	82%

*Note: COLS 100 is a 3 credit study skills course designed for Pre-University Studies students*

### I-c. Success Rates in Subsequent Coursework

A measure of success often used with developmental coursework is success in the subsequent college-level course. The data below is based on students who successfully completed their developmental sequence in fall 2008 and enrolled in the subsequent MSU-Bozeman Core course.

Developmental student success in subsequent MSU core-level Math (including College Algebra)

	Total	Successful (A, B, C)	Unsuccessful (D, F)	Withdrew (W)
# students	174	113	34	27
percentage	100%	65%	19.5%	15.5%

Developmental student success in subsequent MSU core-level Writing (WRIT 101)

	Total	Successful (A, B, C)	Unsuccessful (D, F)	Withdrew (W)
# students	94	79	10	5
percentage	100%	84%	10.6%	5.3%

### I-d. Completion of the developmental sequence

The MSU-GF COT offers two levels of developmental Math and two levels of developmental Writing. Another measure of success used with developmental coursework is completion of the student's developmental sequence (i.e., if a student places into a Level I course, successful completion would mean taking and passing both the Level I and Level II courses). Looking at data for both Math and Writing, **79.5% of students successfully completed their developmental sequence of courses.**

### I-e. Developmental Student Performance

The Grade Point Average (GPA) for students enrolled in developmental coursework in fall 2008 was 2.49. The MSU First Year student average GPA in fall 2008 was 2.79

### I-f. Student Retention Rates

The student retention rate for students who enrolled in developmental courses for the period of Fall 2008-Fall 2009 was 56 percent. The MSU First Year student retention rate fall 2008-2009 was 72 percent. The MSU-GF COT rates for full-time students range from 43-51%

### I-g. Best Practices in Developmental Education

Success in developmental courses is largely due to attention to best practices by offering small classes taught by faculty or adjunct faculty focused on developmental students.



These practices include:

- An academic development center
- Mandatory placement
- Free tutoring
- Intrusive advising through an early alert system
- Use of technology used to supplement classroom instruction
- A learning community option
- Frequent testing and feedback
- Critical thinking and learning skills taught in the courses
- Continuous program assessment and evaluation

## II. Workforce Programs

In the fall of 2005, the MSU-GF COT in Bozeman began offering programs in workforce development starting with a two-year Associate of Applied Science (AAS) degree in Aviation, followed by an AAS in Interior Design in 2007, and an AAS in Design Drafting in 2009.

In partnership with the Bozeman School District for a joint use welding lab, the MSU-GF COT in Bozeman also offers a Certificate of Applied Science in Welding Technology.

The following data shows the MSU-GF COT's workforce programs enrollment growth, student demographics, graduation rates, and job placement information.

Aviation	% Gallatin Area	% Other MT Cities	% Non-Resident	Average Age	Age Range	Annual FTE	Unduplicated Headcount
2009-10 (fall only)	40	43	17	23.3	18-38	20.3	35
2008-09	41	29.5	29.5	23.4	18-38	25.7	44
2007-08	39.2	30.4	30.4	23.8	19-39	26.5	46
2006-07	42	26	32	24.5	19-47	15.43	31
2005-06	51.6	29	19.4	29.7	23-58	9.37	31

Interior Design	% Gallatin Area	% Other MT Cities	% Non-Resident	Average Age	Age Range	Annual FTE	Unduplicated Headcount
2009-10 (fall only)	60.4	28.3	11.3	25.7	18-57	33.27	53
2008-09	60.4	33.3	6.3	25.6	18-56	31.87	48
2007-08	68	18	14	24.3	19-55	12.17	22



Design Drafting	% Gallatin Area	% Other MT Cities	% Non-Resident	Average Age	Age Range	Annual FTE	Unduplicated Headcount
2009-10 (fall only)	66.7	33.3	0	34.4	19-58	5.7	9

Welding	% Gallatin Area	% Other MT Cities	% Non-Resident	Average Age	Age Range	Annual FTE	Unduplicated Headcount
2009-10 (fall only)	26.7	60	13.3	23.5	18-40	12.3	15
2008-09	82.4	17.6	0	26	19-47	14.23	17
2007-08	67	25	8	27.3	19-46	4.9	12

**II-a. Projected Enrollment FY/AY11 (2010-2011)<sup>1</sup> (Headcount)**

Aviation:	36
Interior Design	48
Welding	16
Design Drafting	<u>18</u>
<b>Total</b>	<b>118</b>

**II-b. Success<sup>2</sup> rates in AAS/CAS coursework, Academic Year 2008-2009**

	Success	Unsuccessful	Withdraw
All Aviation courses	92.4%	7%	<.01%
All Welding courses	100%	0%	0%
All Interior Design	88%	3.6%	8.3%

**Graduation Rates:** (The % graduated reflects full-time students who complete their program within two years. Graduation rates will increase in coming years as part-time students complete their program.)

Aviation	Incoming Cohort*	Graduated as of 5/2009	% Graduated
2008	20	10 (projected)	
2007	24	8	
2006	17	8	
2005	9	4	
Total	70	30	43%

Interior Design	Incoming Cohort*	Graduated as of 5/2009	% Graduated
2008	32	12 (projected)	
2007	14	5	
Total	46	17	37%

<sup>1</sup> Based on current programs, does not include new program assumptions.

<sup>2</sup> Success is defined as passing grades A, B, or C. Unsuccessful is defined as grades D or F. Withdraw defined as all students who dropped after the initial drop deadlines and received a W on their transcript for the course.

Welding	Incoming Cohort*	Graduated as of 5/2009	% Graduated
2009	14	12 (projected)	
2008	16	14	
2007	14	12	
Total	44	38	86%

\*Incoming cohort is the number of students starting a program that academic year

### II-c. Job Placement after program completion

(Data collected in direct interviews with program graduates by MSU-GF COT – Bozeman Program Directors)

	Employed in Field	Of Those Employed		Of Those Employed	
		Employed Full-time	Employed part-time	Employed In-State	Employed Out-of-State
Aviation	55%	80%	20%	80%	20%
Interior Design	60%	60%	40%	60%	40%
Welding	50%	92%	8%	92%	8%

### Enrolled in Bachelor's Program after program completion:

Aviation	60%
Interior Design	40%
Welding	11%

## MSU-Great Falls College of Technology in Bozeman: Student Service Issues

The oversight and operation of the MSU-Great Falls College of Technology (MSU-GF COT) in Bozeman presents significant challenges based on the geographic distance to the MSU-Great Falls campus.

The following issues are offered as a representation of the kinds of problems that students from MSU-GF COT in Bozeman encounter due to this structure and distance. Issues like those listed occur frequently and create frustration for the students and the staff who serve them. Although each issue individually is manageable, their number and frequency require that the MSU-GF COT faculty and staff in Bozeman spend an inordinate amount of time trying to come up with unique ways to resolve each issue and not let them detract from the student's educational experience.

### I. Disability Support Issues

Recently, a MSU-GF COT in Bozeman student needed disability support services. Through hands-on assistance from the staff from MSU-GF COT in Bozeman and MSU-GF, she will receive the services needed. However, without being an MSU-Bozeman student and being at a distance from the Great Falls campus, she and other students do not benefit from additional software and hardware available in Great Falls, and cannot access the same resources locally because they are not MSU-Bozeman students. Thus either MSU-GF COT duplicates services, software and hardware in Bozeman, or staff will have to obtain special permissions and along with the student, work harder to get access to assistive technology than she would if she were either on the Great Falls campus or a student at MSU-Bozeman. The nature of disability is such that each unique situation takes much more time to resolve, and the more barriers that exist, the less likely students are to seek out the assistance they need.

*“As a student that is legally blind, it has been challenging to access any disability services from MSU-Great Falls which is 180 miles away”- Pamela, MSU-GF COT Interior Design Student*

### II. Financial Aid Issues

Students with financial aid questions are unable to meet in person with the financial aid office at MSU-GF COT and must address all of their financial aid questions over the phone. This lack of face to face contact is an issue for other student services. Providing the face-to-face service, a hallmark of two-year colleges and students, would require duplication of financial aid resources available locally for MSU-Bozeman students.

*"It would be a lot easier to talk to a person face to face"- Sam, MSU-GF COT Aviation Student*

### **III. Information Technology Issues**

MSU-GF COT in Bozeman students cannot log on to the MSU computers in the classrooms where their classes are taught. The computer operations in the MSU-Bozeman classrooms are not set up to accommodate Great Falls student's access, as is similar to other computer laboratories that exist around campus. Those labs are often funded from MSU-Bozeman student fees, which don't apply to the MSU-GF COT in Bozeman students.

*"It was overwhelming and frustrating. I could never get my password to work on the computers in the MSU classrooms"-Pamela, MSU-GF COT Interior Design Student*

### **IV. Bookstore Issues**

Usage of the MSU-Bozeman bookstore is problematic for MSU-GF COT students. The student cannot purchase books by using credit for their pending financial aid as they could if they used the bookstore at MSU-GF COT. Thus they are required to either purchase online from MSU-GF COT and pay postage, or use credit cards or other means to purchase from the MSU bookstore until they receive their financial aid funds from MSU-GF COT.

### **V. Admission Issues**

Students and parents are often confused as to which institution they need to submit applications. In many cases they apply to MSU-Bozeman for admission and financial aid, only find out they have to re-apply to MSU-GF COT for the program they had selected.

*"Already as an applicant, I have run into numerous hurdles in the process" –Joakim, Applicant to the Aviation Program*

### **VI. Student Services Issues**

This confusion extends to other operations such as applying for graduation, dropping and adding classes, withdrawing, checking grades, access to student health insurance, access to the fitness center, etc. While MSU-Bozeman and MSU-GF COT in Bozeman have attempted to make students feel they belong and that the MSU-Bozeman campus is "their" campus, these students frequently run into things that make them feel like visitors on campus.

*"Being an MSU-Great Falls student on the Bozeman campus has presented many challenges" –Brandi, Aviation Student*

## MSU-Great Falls College of Technology in Bozeman Revenue and Expenditures

The following chart illustrates the expenditures and revenues associated top the operations of the MSU-Great Falls College of Technology (MSU-GF COT) in Bozeman for the period of Fiscal Year (FY) 2005 through Fiscal Year (FY) 2009.

<b>Expenditures</b>					
	<b>FY 05</b>	<b>FY 06</b>	<b>FY 07</b>	<b>FY 08</b>	<b>FY 09</b>
Personal Services	134,712	481,571	589,721	809,362	841,078
Operations	35,775	84,231	63,692	105,386	86,012
<b>Total</b>	<b>170,487</b>	<b>565,802</b>	<b>653,413</b>	<b>914,748</b>	<b>927,090</b>
<b>Tuition Revenue</b>					
	<b>FY 05</b>	<b>FY 06</b>	<b>FY 07</b>	<b>FY 08</b>	<b>FY 09</b>
Resident	51,016	244,068	384,339	577,293	656,270
Non-Resident	19,978	48,424	123,639	159,153	152,764
WUE	0	858	0	0	648
<b>Total</b>	<b>70,994</b>	<b>293,350</b>	<b>507,978</b>	<b>736,446</b>	<b>809,682</b>
<b>Expenditures &amp; Revenue</b>					
<b>Over/(Under)</b>	<b>(99,494)</b>	<b>(272,451)</b>	<b>(145,435)</b>	<b>(178,302)</b>	<b>(117,408)</b>

This analysis does not take into account any indirect costs for student services, accounting, IT, or any other service provided by MSU-GF COT.

The following charts reflect a projection of expenses and revenues for the next five years with operations transferred to MSU-Bozeman.

## MSU-Bozeman Expenditure/Revenue Projection

FY10	Student FTE	Classes	Faculty Pers Svcs	Staff Pers Svcs	Operations	Total Expenses	Tuition Revenue	General Fund	Balance
Developmental Instruction									
Math	121.93	39	281,112	12,998	2,665	296,775	556,519		259,744
Humanities (Writ. & COLS)	45.2	22	116,604	12,998	1,015	130,617	205,654		75,037
Academic Success Lab	0	0		44,897	3,450	48,347	-		(48,347)
Subtotal	167.13	61	397,716	70,893	7,130	475,739	762,173	0	286,434
COT Degree Programs									
Welding	12.3	13	79,022	8,144	11,695	98,861	36,900		(61,961)
Interior Design	28	21	94,883	8,144	5,034	108,061	84,000		(24,061)
Aviation	17.2	12	58,948	8,144	7,260	74,352	51,600		(22,752)
Design Drafting	4.77	5	11,848	8,144	1,875	21,867	14,310		(7,557)
Subtotal	62.27	51	244,701	32,576	25,864	303,141	186,810	0	(116,331)
COT Infrastructure									
Academic Support				72,914	3,450	76,364			(76,364)
Institutional Support				98,685	50,153	148,838			(148,838)
Subtotal				171,599	53,603	225,202		0	(225,202)
Total	229.4	112	642,417	275,068	86,597	1,004,082	948,983	0	(55,099)

Projected FY 2011									
	Student FTE	Classes	Faculty Pers Svcs	Staff Pers Svcs	Operations	Total Expenses	Tuition Revenue	General Fund	Balance
Developmental Instruction	167	61	397,716	81,526	7,130	486,372	785,038	224,672	523,338
COT Degree Programs	76	59	298,774	32,576	25,864	357,214	228,000		(129,214)
COT Infrastructure				171,599	53,603	225,202			(225,202)
Total	243	120	696,490	285,701	86,597	1,068,788	1,013,038	224,672	168,922

# Transition Plan from Montana State University-Great Falls College of Technology to MSU-Bozeman

## I. Scope of the Transition

A change in administrative oversight for the current operations of the MSU-GF COT in Bozeman requires the transition of the following entities:

Workforce Development Students, 86 Headcount

Employees: COT Staff-5 FTE, Faculty-8 FTE and Adjuncts-25

Administrative and support services provided through MSU-GF COT

Almost all developmental education students are registered MSU-Bozeman students, so they will not require additional transition efforts. Outreach and Professional development are no longer part of the MSU-GF COT's responsibility as these functions were previously transferred to MSU's Extended University in July 2009.

## II. Transition Leaders and Process

The transition team at MSU-GF COT will be led by Dean Joe Schaffer, while the transition team from MSU-Bozeman will be led by Chief Operating Officer Bob Hietala and the MSU-Bozeman transition team will be led by Vice President of Inter-Campus Affairs Rolf Groseth and Interim Provost Joe Fedock. The identified transition plan has been reviewed by all three entities and the established tasks and timeframes have been acknowledged as reasonable.

The plan will be revised as new tasks are identified or other tasks are completed. Based on the evaluation of the plan by the involved parties, the majority of the tasks in the transition can be completed in the first month. Tasks will be prioritized to ensure the timely completion of the most critical items.

## III. Transition Plan

A change in administrative oversight for the current operations of the MSU-GF COT in Bozeman requires the transition of the following entities:

Transition Task	Estimate of Required Transition Time	Responsible Parties
<b>Human Resources</b>		
Change payroll to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Set up employee direct deposits	28 days	MSU-GF COT MSU-Bozeman
Change employee benefit accounts to MSU	28 days	MSU-GF COT MSU-Bozeman
Transfer employee leave balances to MSU	28 days	MSU-GF COT MSU-Bozeman
Address VTEM bargaining unit employees	28 days	MSU-GF COT MSU-Bozeman
Address MPEA bargaining unit employees	28 days	MSU-GF COT MSU-Bozeman
Address tenure process for faculty	28 days	MSU-GF COT MSU-Bozeman

Set up faculty and staff contracts	28 days	MSU-GF COT MSU-Bozeman
Set up Banner Web log ins for faculty & staff	28 days	MSU-Bozeman
Set up HR support services from MSU-Bozeman	15 days	MSU-Bozeman
Transfer copy of HR record to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Faculty/staff meeting with MSU-Bozeman	5 days	MSU-Bozeman
Review MSU HR P&P's	10 days	MSU-Bozeman
Address Adjunct collective bargaining	28 days	MSU-GF COT MSU-Bozeman
<b>Financial</b>		
Set up cashier for MSU-GF COT students	15 days	MSU-Bozeman
Inventory of Equipment provided to MSU & MSU-GF	10 days	MSU-GF COT MSU-Bozeman
Change vendor accounts to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Change purchasing card accounts to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Budgeting & purchasing training for staff	28 days	MSU-Bozeman
Change FTE projections with OCHE for both institutions	28 days	MSU-GF COT MSU-Bozeman
Financial reporting and budget	28 days	MSU-GF COT MSU-Bozeman
Establish tuition policy for MSU-GF COT courses	28 days	MSU-GF COT MSU-Bozeman
Close out MSU-GF COT petty cash	15 days	MSU-GF COT MSU-Bozeman
Set up MSU-Bozeman petty cash	15 days	MSU-Bozeman
Transition to UPBAC Budget process	28 days	MSU-GF COT MSU-Bozeman
Review MSU-Bozeman financial P&P	15 days	
Financial aid training for staff	28 days	
<b>Student Services</b>		
Financial aid set up at MSU-Bozeman for new students	28 days	MSU-Bozeman
Financial Aid transitioned for returning students	28 days	MSU-GF COT MSU-Bozeman
Admissions process set up for fall 2010 enrollments	25 days	MSU-GF COT MSU-Bozeman
Transfer or copy student record for current students	25 days	MSU-GF COT MSU-Bozeman
Set up new student IT log ins	10 days	MSU-Bozeman
Transfer or copy student disability, disciplinary & other records	10 days	MSU-GF COT MSU-Bozeman
<b>Academic Affairs</b>		
Notification of NWCCU	5 days	MSU-GF COT
Change to MSU-Bozeman Calendar	5 days	MSU-Bozeman
Set up internal program review process	25 days	MSU-GF COT MSU-Bozeman
Set up curriculum committee	25 days	MSU-GF COT MSU-Bozeman
Staff training in admissions procedures	25 days	MSU-Bozeman
Build all courses into MSU-Bozeman Banner & transfer fall registrations	28 days	MSU-Bozeman
Letter to COT students	5 days	MSU-Bozeman
Determine CAO function and role	28 days	MSU-GF COT MSU-Bozeman
Establish academic senate	60 days	MSU-GF COT MSU-Bozeman



<b>Communications</b>		
Letter from MSU President to University community	5 days	MSU-Bozeman
Press release	5 days	MSU-Bozeman
Community meetings	60 days	MSU-Bozeman
MSU-Bozeman informational meetings	60 days	MSU-Bozeman
2010-11 catalogue addendums	60 days	MSU-Bozeman
2010-11 marketing material addendums	60 days	MSU-Bozeman
Reprint business cards, name tags & name plates	28 days	MSU-Bozeman
Reprint signage in Culbertson hall	45 days	MSU-Bozeman
Develop & implement marketing campaign	80 days	MSU-Bozeman
<b>Information Technology</b>		
Update MSU-Bozeman website	28 days	MSU-GF COT , MSU-Bozeman
Update MSU-Bozeman website content	28 days	MSU-GF COT MSU-Bozeman
Change website link to MSU-Bozeman	10 days	MSU-GF COT MSU-Bozeman
Change emails to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Change server connections to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Change server connections to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Transfer computers to MSU-Bozeman	28 days	MSU-GF COT MSU-Bozeman
Move all files to MSU-Bozeman server	28 days	MSU-GF COT MSU-Bozeman
Set up IT support services with MSU	10 days	MSU-GF COT MSU-Bozeman
Move faculty websites to MSU-Bozeman website	60 days	MSU-GF COT MSU-Bozeman
Set up new student IT log ins	10 days	MSU-Bozeman
<b>Community Integration</b>		
Meet with MSU-GF COT advisory board	45 days	MSU-GF COT MSU-Bozeman
Meet with program advisory boards	45 days	MSU-GF COT MSU-Bozeman
<b>Other</b>		
Update MOU's with MSU	28 days	MSU-GF COT MSU-Bozeman
Include staff in appropriate MSU-Bozeman committee structure	45 days	MSU-GF COT MSU-Bozeman

# MSU-GF COT in Bozeman Advisory Board Meeting Minutes

2-4-2010

Location: Bozeman Job Service, 121 N. Willson-Upstairs Conference Room,  
Attendees: Kirk Miller & Byrdeen Warwood-Bozeman Public Schools, Skip Gunlikson Belgrade High School, Jeff Adams MSU, JP Pomnichowski MT House of Representatives, Bob Hawks Montana Senate, Jeff Krauss Bozeman Mayor, Daryl Schliem Bozeman Area Chamber of Commerce, Stuart Leidner Prospera Business Network, Debbie Berg Bozeman Job Service, Stacy Scott Montana Manufacturing Extension Center and Pam Fisher Retired Community College Executive

Staff: Bob Hietala, Janet Heiss-Arms, Ryan Haskins and Tabby Jagger

## Minutes of the Meeting

### 1. Introductions

The meeting was called to order by Bob Hietala. Attendees introduced themselves to the Board.

### 2. COT Developmental Education Student Data

Janet Heiss-Arms presented data on the developmental education programs for the COT. Board members asked for clarification as to the types of students that are served through the developmental course work. Janet explained the types of students served and the success measures that the COT is tracking. Pam Fisher mentioned that based on her national experience with developmental education programs, she felt that the success in the COT developmental coursework was outstanding.

### 3. COT Workforce Development Programs Student Data

Similar data was presented on the one and two year degree programs by Ryan Haskins. Senator Hawks mentioned that from a systems perspective the graduation rates often seem lower in these programs because of the number of students who take some classes on a part-time basis and are not interested in completing the program. Stacy Scott mentioned that she was an example of this type of student as she took a number of the interior design classes at the COT without the intent to complete the program.

### 4. Board of Regents' Committee Update

Senator Hawks gave a synopsis of the systems reform work that is being undertaken by the Regent's committee on which he serves.

## 5. MSU Two Year Education Proposal

Bob Hietala gave the committee an update on the status of the MSU proposal. He explained that since the November meeting, Joe Schaffer and Rolf Groseth had initiated a number of discussions with individual Regents to explore their questions and concerns with the proposal. Bob also explained that the following documents were put together to support the proposal: a detailed transition plan, a COT Student Data and Program Outcome Report, a list of representative student issues with the current structure, the COT's financial history and an update of the previous needs assessment for expanded one and two-year education programs in Gallatin Valley. He went on to say that it was his understanding that President Cruzado would be talking with Commissioner Stearns about the MSU proposal and determine the timing and process for revisiting this issue with the Regents.

A number of Advisory Board Members stated that since the November Meeting, they had initiated discussions with individual Regents about the proposal. The Advisory Board members reported that the responses from Regents were varied, with both support for the initiative and concerns presented.

Advisory Board members spent the rest of the meeting discussing the status of the MSU proposal. One approach that the Board seemed to agree on concerned the need to more clearly frame the MSU request as simply a transfer of an organizational unit. This move from Great Falls to Bozeman makes sense based on better meeting the COT students' needs and improving operating efficiencies. The recommendation from the Advisory Board was to set aside the expanded 2-year college part of the discussion and initiative. This also makes sense given the financial challenges that the state is currently facing. Board Members mentioned that they are willing to provide whatever assistance is needed on the MSU initiative.

**Community Advisory Board of the College of Technology in Bozeman an Extension of MSU-Great Falls College of Technology**

Montana Board of Regents

2500 Broadway Street

PO Box 20301

Helena, MT 59620-3201

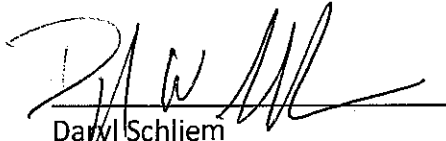
Montana Board of Regents:

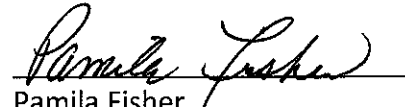
As the members of the Community Advisory Board for the College of Technology (COT) in Bozeman (an extension of MSU-Great Falls COT), we support the transition of two-year education offerings in Gallatin Valley to Montana State University-Bozeman. While we recognize MSU-Great Falls for the work they have done to develop opportunities for members of the Bozeman community, it is time for our community to take responsibility for these courses and programs. MSU-Great Falls has developed expertise on two-year education in Bozeman, and that expertise will remain in Bozeman.

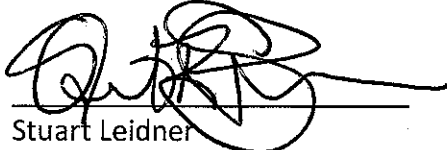
The faculty and staff at the COT in Bozeman (MSU-GF extension) have communicated regularly with us, the COT in Bozeman Community Advisory Board, as they have developed courses and programs. Through our ongoing meetings and conversations, it has become clear that students enrolled in the one- and two-year degree programs through MSU-GF experience significant frustration navigating services offered only on the Great Falls campus. It is not financially prudent to develop each of those services (i.e., Admissions, Financial Aid, Cashier, Registrar, etc.) for the COT in Bozeman, especially while they already exist at MSU-Bozeman. Further, students become confused because the COT in Bozeman operates on the grounds of the MSU-Bozeman campus, while remaining an extension of MSU-Great Falls COT.


It makes sense, first and foremost for students, but also for the Bozeman community for MSU-Bozeman to assume responsibility for the two-year education courses and programs offered in Gallatin Valley. This change will allow for the expansion of existing collaborations like the Bozeman School District #7 and the COT partnering on facilities for the welding program and partnering on dual credit opportunities in math.

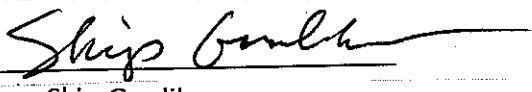
The members of the COT Community Advisory Board fully support this proposal. Advisory Board signatures compiled April, 2010.

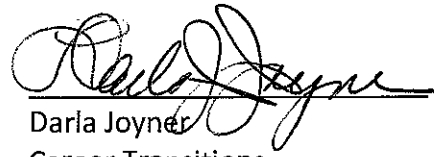
  
Daryl Schliem  
Bozeman Chamber of Commerce

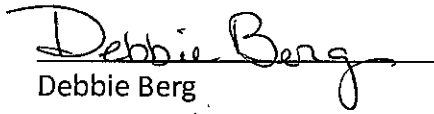
  
Pamela Fisher  
Ed.D-Community Member

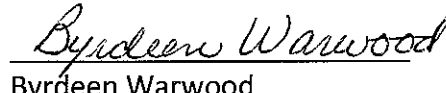
  
Stuart Leidner  
Prospera Business Network

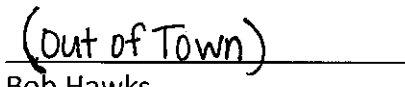
  
Earl Mathers  
Gallatin County

  
Skip Gunlikson  
Belgrade High School

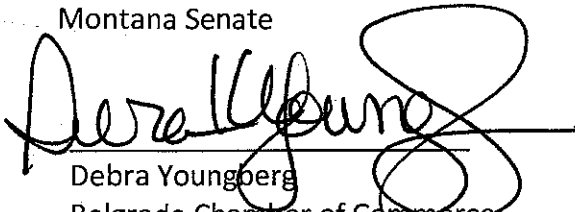
  
Darla Joyner  
Career Transitions

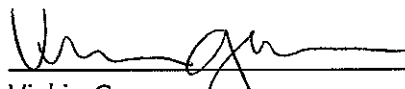
  
Debbie Berg  
Bozeman Job Service

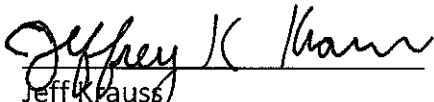
  
Byrdeen Warwood  
Bozeman Public Schools

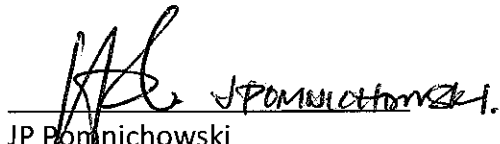
  
(Out of Town)  
Bob Hawks  
Montana Senate


  
Marilyn King  
Bozeman Public Schools

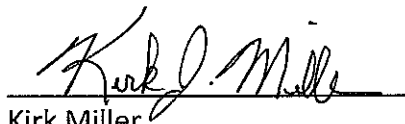
  
Debra Youngberg  
Belgrade Chamber of Commerce

  
Vickie Groeneweg  
Bozeman Deaconess Hospital

  
Jeff Knaus  
Mayor of Bozeman

  
JP Poninichowski  
Montana House of Representatives

  
Steve Holland  
Montana Manufacturing Extension Center

  
Kirk Miller  
Bozeman Public Schools



## GALLATIN COUNTY ADMINISTRATIVE OFFICE

Earl F. Mathers, County Administrator

311 West Main St. Room 311 Bozeman, MT 59715  
Phone (406)582-3008 Fax (406)582-3009

April 15, 2010

Montana Board of Regents

Dear Board of Regents Members:

It is my understanding that the Board of Regents is reconsidering the possibility of transferring responsibility for two-year programs in the Gallatin Valley to MSU Bozeman. As you know, the Gallatin Valley is the only urban area of the state without a two-year higher education provider. Moreover, Gallatin County has been the fastest growing county in Montana in recent years and our workforce education needs have grown correspondingly. Indications are that the 2010 census will reveal Gallatin County's population to be more than 90,000.

Although the economy in Gallatin and Park Counties has slowed, we anticipate renewed growth in the not too distant future. A robust set of two-year degree programs will help us to capitalize on this potential. I believe that there are a number of occupational categories in our area that would be well served by a broader range of two-year programs.

A July 2008 proposal for MSU Bozeman to oversee the two-year programs was driven by the administrative efficiencies that integration would provide. These efficiencies would reduce costs and increase student access to support services such as financial aid assistance, registration, billing and transcripts. A favorable impact for students at both the two-year and four-institution could be achieved in addition to the aforementioned budget savings.

There are additional reasons for the transfer of authority and MSU Bozeman is well-positioned to assume responsibility for these important programs due to the following:

- Existing relationships with area high schools.
- On-going relationships with government officials, local business leaders and the healthcare industry, which will prove vital to expanding the institution's partnerships with these groups.
- MSU faculty experience in working closely with the hi-tech firms in the valley which gives them a strong technical understanding of that industry's workforce training needs.
- MSU expertise in providing the spectrum of programs and training that is needed, from technology-based to construction to healthcare to general business courses and programs.

MSU and the institutions of the Gallatin Valley have been partners in education for over 100 years and it seems an ideal time for expanding that partnership in a manner that captures new efficiencies while taking advantage of opportunities to contribute to the economic vitality of our area. I urge your approval of the transfer of responsibility for these instructional and training programs from the Great Falls College of Technology to MSU Bozeman. Thank you for your consideration of my comments.

Sincerely,

A handwritten signature in black ink, appearing to read "Earl F. Mathers", with a long horizontal flourish extending to the right.

Earl Mathers  
County Administrator

April 13, 2010

Montana Board of Regents  
Montana University System  
2500 Broadway Street  
PO Box 203201  
Helena, MT 59620-3201

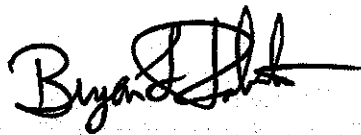
Dear Members of the Board of Regents:

This letter is being written in support of the proposal to change operational responsibility of the College of Technology in Bozeman from MSU-Great Falls College of Technology to MSU-Bozeman. This shift in administrative oversight would likely provide operational efficiencies and a stronger level of local ownership for these programs.

As President and CEO of Advanced Electronic Designs, Inc. in Bozeman, I am well aware of the employment needs of manufacturing and technology businesses in our area. Associate Degree programs have historically been some of the most difficult positions to fill in the Gallatin Valley. Having additional one and two year degree programs would be a great asset for these businesses and meet the needs of hundreds of potential students.

I believe that the two-year education proposal put forth by MSU shows a strong commitment for education of local students and economic development for our community. I hope you will support this proposal.

Sincerely,



Bryan Robertus  
President



April 20, 2010

Dear Board of Regents,

This letter is written in support of transitioning operational responsibility of College of Technology in Bozeman from MSU-Great Falls to MSU-Bozeman. As a community members and Advisory Board Members for the Interior Design Program, COT, Bozeman, we are thankful for the work MSU-Great Falls has done to bring one and two-year education to the Bozeman, but we believe it is a mission best served by MSU-Bozeman as programming continues to grow.

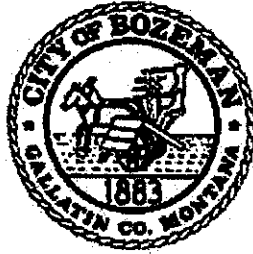
Demand for one and two-year education in the Gallatin Valley and surrounding counties is high. As the demand for additional workforce programs grows, it will become increasingly difficult for MSU-Great Falls to oversee the operations at the Bozeman campus from a distance. If MSU-Bozeman were to acquire operational control of the COT in Bozeman, it would be beneficial to the students and community in many ways. Workforce program students would have direct access to the all the Student Service offices which are currently serving them from Great Falls. Students who are seeking an alternative to a four-year degree or who need refresher courses for their current jobs will have more options that are currently unavailable in Bozeman. The Bozeman community would acquire a sense of responsibility and ownership if the COT was no longer affiliated with Great Falls.

As community members with a vested interest in the COT in Bozeman, we highly support the move from MSU-Great Falls to MSU-Bozeman. For the students and for the community, it is the best option.

Sincerely,

MSUGF COT in Bozeman  
Interior Design Program Advisory Board Members

*Deb Johnson ASID, RDI INTERIOR ENVIRONMENTS, INC.*  
*Pat Whitford PAT WHITFORD INTERIOR DESIGN*  
*Carol Merica CAROL MERICA DESIGN ASSOCIATES*  
*Mary Wisman CMKBD, ASID MARY WISMAN DESIGN & CONSULTATION*  
*Kristie Engle McPhie, CKD - MCPHIE CABINETRY*  
*Carmen Passall, ASID. Rocky Mountain Design - Interiors*



**COMMISSION RESOLUTION NO. 4222**

**A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF BOZEMAN,  
MONTANA, DECLARING SUPPORT FOR MONTANA STATE UNIVERSITY-  
BOZEMAN TO ASSUME RESPONSIBILITY FOR TWO-YEAR PROGRAMMING IN  
THE GALLATIN VALLEY.**

**WHEREAS,** The Montana Board of Regents will be meeting on November 19-20 at Montana State University.

**WHEREAS,** Montana State University-Bozeman is requesting authorization to assume responsibility for two-year programming and to award two-year degrees currently offered by MSU-Great Falls in the Gallatin Valley.

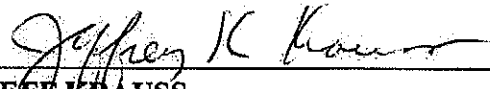
**WHEREAS,** The City Commission approved the Bozeman Economic Development Plan in August 2009.

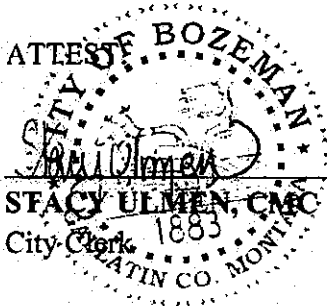

**WHEREAS,** The Bozeman Economic Development Plan recommended that the City support education and workforce development initiatives to provide Bozeman with the qualified workers to meet the needs of business.

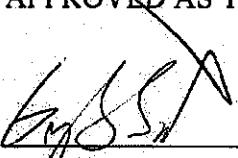
**WHEREAS,** The City of Bozeman supports the creation of a comprehensive 2 year college program for Gallatin and surrounding counties,

**NOW THEREFORE BE IT RESOLVED,** that the City Commission supports the authorization request by MSU Bozeman to assume and expand to a full catalog of a 2 year programming toward 2 year degrees in Gallatin Valley.

**PASSED AND ADOPTED** by the City Commission of the City of Bozeman, Montana, at a regular session thereof on the 16<sup>th</sup> day of November, 2009.

  
\_\_\_\_\_  
**JEFF KRAUSS**  
Deputy Mayor

  
ATTEST  
  
\_\_\_\_\_  
**STACY ULMEN, CMC**  
City Clerk 1883

APPROVED AS TO FORM:  
  
\_\_\_\_\_  
**GREG SULLIVAN**  
City Attorney



Manufacturer of World-Class Pet Products  
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www.WestPawDesign.com • 32050 E. Frontage Rd. • Bozeman, MT 59715 • Ph: 406.585.0505 • Fx: 406.585.0808

April 16, 2010

Montana University System Board of Regents  
Office of Commissioner of Higher Education  
2500 Broadway Street  
Helena, MT 59620-3201

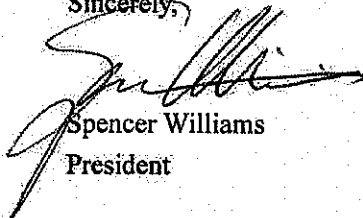
Board of Regents,

West Paw Design, a local manufacturer of quality toys and bedding for pets, supports the proposal being considered by the Montana Board of Regents to transfer the administration of the College of Technology operations in Bozeman, from Montana State University-Great Falls College of Technology to Montana State University-Bozeman. This seems to be a timely change as the work that MSU-Great Falls College of Technology has done starting up this operation must at some point have become a drain on their resources. We feel that the local community and the local unit of Higher Education, MSU-Bozeman, are best positioned to move forward the development of two-year education in this area of the state.

There is a great need in our local area for these community college programs. As a local employer we see much potential for one or two year educational programs that could benefit our community and our workforce. With the support that exists in the local community for these programs and the commitment from MSU-Bozeman to assume responsibility for these operations, the momentum is here to further develop these programs.

At West Paw Design, we enthusiastically support the MSU proposal.

Sincerely,



Spencer Williams  
President



*Bozeman Job Service  
121 North Willson  
Bozeman, MT 59715  
Phone: 406-582-9200  
Fax: 406-582-9210  
bozemanjsc@mt.gov*

April 16, 2010

Board of Regents-Montana University System  
2500 Broadway Street  
PO Box 20301  
Helena, MT 59620-3201

Regents,

The Bozeman Job Service enthusiastically supports the proposal by Montana State University-Bozeman to assume responsibility for two-year education in Gallatin Valley. As a member of the Advisory Board for the MSU-Great Falls College of Technology Extension (COT in Bozeman), I feel that the education and training programs that are provided by the COT in Bozeman are important to our community. In our workforce development efforts at Job Service, we see an unmet need in this area of the state, a need which could be met through additional one and two-year programs.

The current administrative structure which has the local COT unit operating through Montana State University Great Falls-College of Technology is cumbersome at best and probably inefficient. It is also a confusing situation for potential students that we talk to at Job Service, as the students don't understand the relationships with MSU-Great Falls COT and MSU-Bozeman. Clearly a transfer to MSU-Bozeman will address these issues.

We hope that you will approve the MSU two-year education request. It will improve the current delivery of programming and services at the COT and be an important step in engaging the community in supporting additional programming.

Sincerely,

A handwritten signature in cursive script that reads "Debbie Berg".

Debbie Berg  
Bozeman Job Service

April 21, 2010

Dear Board of Regents,

The COT in Bozeman Aviation program Advisory Board would like to express its support for the proposed transition of administrative responsibility for the Bozeman COT from MSU Great Falls to MSU – Bozeman. The current administrative structure creates difficulties for the Bozeman COT staff to meet the needs of their students in an efficient manner. In addition, the admissions process is often confusing for new students due to the co-location of campuses, confusing institutional names, and a complicated admissions and recruiting structure. The transition from MSU-Great Falls to MSU-Bozeman would also provide additional operational efficiencies as well. In a time of reduced public resources, it makes sense to be as administratively efficient as possible. Lastly, there is a confusing sense of identity and a lack of brand recognition. A locally administered COT will help create a local identity and garner public support for a local institution. This would not only benefit current programs, but would also be beneficial in creating new programs in response to the needs of the community.

MSU Great Falls College of Technology is to be commended for the difficult task of starting up the local COT extension and allocating resources to do so, but it seems that it is time for the Bozeman COT to be administered and supported at the local level. This will provide a stronger level of local investment as we collectively work to expand these programs and meet the needs of both area students and our local employers.

This letter has been approved by the following COT Aviation Program Advisory Board on April 21<sup>st</sup>, 2010.

David Boyd  
Doug Cairns  
David Kack  
Doug Chapman  
Ben Walton



NorthWestern Corporation  
d/b/a NorthWestern Energy  
Bozeman Division  
121 East Griffin Drive  
Bozeman, MT 59715  
Telephone: (406) 582-4537  
www.northwesternenergy.com

April 14, 2010

Board of Regents-Montana University System  
2500 Broadway Street  
PO Box 20301  
Helena, MT 59620-3201

Board of Regents,

At your May 27 Board of Regents meeting, you will be considering a proposal from Montana State University-Bozeman to assume responsibility for two-year education in Gallatin Valley and transfer the administration of the current College of Technology Extension, from MSU-Great Falls College of Technology to MSU-Bozeman. As you consider the merits of the transfer of responsibility, I ask that you take into account the needs of our local community, which support this proposal by MSU-Bozeman.

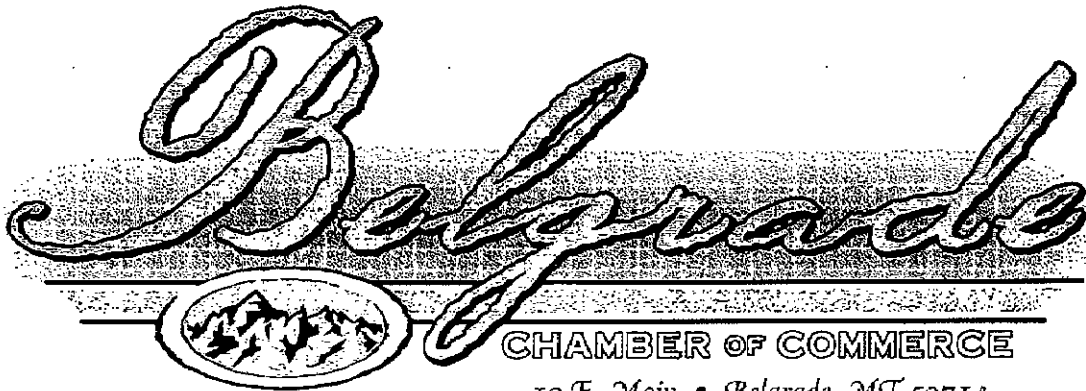
With a local economy that has shown the fastest growth in the state in recent years, we have the types of manufacturing, technology, construction and engineering, healthcare, professional services and hospitality employers that would benefit from having additional one and two-year educational programs in Gallatin Valley. The young population of Bozeman, the increasing unemployment rate and the slowdown in the local construction industry all speak to the large pool of potential students for these workforce programs in this area. The transfer of responsibility from MSU-Great Falls would support the value of community participation and collaboration in two-year education in Montana. This seems like the right decision for Cascade County and Gallatin and Park Counties.

At Northwestern Energy we recognize that this transfer is just a first step and that the community will need to work with MSU-Bozeman and the Commissioner's Office of Higher Education to develop the expanded programming that we need in Gallatin Valley. Though, I believe that this transfer is necessary and I fully support the MSU proposal.

A handwritten signature in black ink, appearing to read "Mel Kotur".

Mel Kotur  
Manager Community Relations





April 19, 2010

10 E. Main • Belgrade, MT 59714  
(406) 388-1616 • Fax (406) 388-2090  
[www.belgradechamber.org](http://www.belgradechamber.org)

Montana Board of Regents  
2500 Broadway Street  
PO Box 20301  
Helena, MT 59620-3201

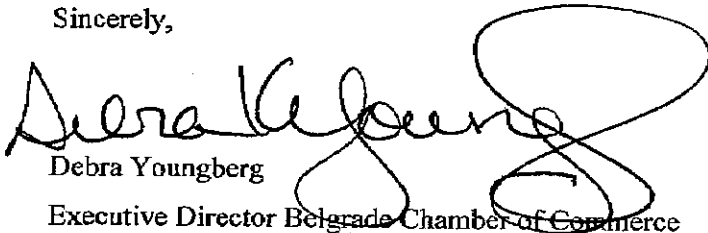
Montana Board of Regents,

I am writing to express the support of the Belgrade Chamber of Commerce for the proposal by Montana State University-Bozeman to assume responsibility for two-year education in Gallatin Valley. The programs that are currently provided by the MSU-Great Falls College of Technology Extension are important to the Belgrade community, though they fall short of meeting the one and two-year needs of our potential students and industries. With the support of Montana State University, we feel the local community will be more invested in supporting two-year education and the programming will expand to meet the needs.

The transition from MSU-Great Falls to MSU-Bozeman would provide operational efficiencies. In a time of scarce public resources, it only makes sense to be as administratively efficient as possible. Additionally, the MSU-Great Falls College of Technology Extension in Bozeman seems handicapped in developing a brand and name recognition. Having a name that reflects two-year education in the local communities would seem much more effective.

Thank you for your consideration.

Sincerely,

  
Debra Youngberg  
Executive Director Belgrade Chamber of Commerce

*Color World***BigLook**  
"We Got You Noticed!"

April 16, 2010

**PRINTERS**Divisions of **W** COMMUNICATIONS GROUP.

Montana Board of Regents,

This letter is being written in support of transitioning operational responsibility of the College of Technology in Bozeman from MSU-Great Falls College of Technology to MSU-Bozeman. As a local business leader, I am thankful for the work MSU-Great Falls COT has done to bring one and two-year education to the area, but I believe it is a mission more efficiently and effectively served by MSU-Bozeman. As the two-year educational programming continues to grow it will be even more important to have these programs administered locally.

Demand for one and two-year education in the Gallatin Valley and the surrounding counties is high. As this demand for additional workforce programs grows, it will become increasingly difficult for MSU-Great Falls COT to oversee the operations at the Bozeman campus from a distance. If MSU-Bozeman were to acquire administrative oversight of the COT in Bozeman, it would be beneficial to the students and community in many ways. I am aware of students at the COT in Bozeman that have been challenged in accessing services due to the distance of the current administrative structure with MSU-Great Falls COT.

As a business leader with a vested interest in two-year education in our area, I highly support the administrative move from MSU-Great Falls COT to MSU-Bozeman. For the students and for our community, this seems to be the best organizational option.

Sincerely,

Jeff Burgard

President

Bozeman MT Office  
201 East Mendenhall  
Bozeman, MT 59715  
800-332-3303 Toll Free  
406-587-4508 Phone  
406-587-0628 Fax

Jackson WY Office  
1325 S. Hwy 89 Unit 103  
Jackson, WY 83001  
800-525-1333 Toll Free  
307-733-8600 Phone  
307-733-3745 Fax

Cody WY Office  
1328 Beck Ave.  
Cody, WY 82414  
800-473-2797 Toll Free  
307-527-6476 Phone  
307-527-6479 Fax

[www.colorworldprinters.com](http://www.colorworldprinters.com)

April 15, 2010



222 East Main Street, Suite 102  
Bozeman, MT 59715  
Ph: 406.587.3113  
Fx: 406.587.9565

Montana Board of Regents  
Office of the Commissioner of Higher Education  
2500 Broadway Street  
PO Box 20301  
Helena, MT 59620-3201

Montana Board of Regents,

It is my understanding that at your meeting on May 27, 2010 you will be considering a proposal by Montana State University-Bozeman to assume responsibility for two-year education in Gallatin Valley. Prosper Business Network, the local Economic Development Organization for Gallatin and Park Counties, supports this proposal by MSU.

In our economic development work in this area we have frequently heard from businesses that mention the need for additional one and two-year degree programs in the local area. This was clearly identified in our 2009 Economic Surveys of the Bozeman area businesses, community leaders and citizens at large. All three groups rated the need for additional one & two-year workforce training programs as a high priority. The lack of local offerings of these workforce programs was identified as an economic weakness in SWOT analysis of the 2009 Bozeman Economic Development Plan.

While it is commendable that MSU Great Falls College of Technology has expended significant resources in starting up the local COT extension, it seems that it is time for this program to be administered and supported at the local level. This will provide a strong level of local investment as we collectively work to expand these operations and meet the needs of both area students and our local employers.

Sincerely,

A handwritten signature in black ink, appearing to read "Stuart Leidner", is written over a horizontal line.

Stuart Leidner  
Executive Director

*Helping Business Prosper*

ProsperaBusinessNetwork.org

# Ferraro's

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April 16, 2010

Montana University System Board of Regents  
Office of Commissioner of Higher Education  
2500 Broadway st.  
Helena, MT 59620-3201

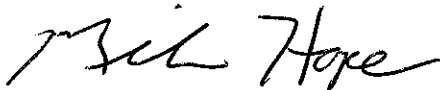
Board of Regents,

As the owner and manager of a number of restaurants in the Bozeman area, I would like to express my support for the two-year educational proposal put forth by Montana State University-Bozeman. The state's two year educational offerings seem to be lacking in this part of the state. I believe that the administrative oversight that MSU-Bozeman would provide would allow the existing College of Technology in Bozeman to expand and grow in ways that would not be possible under the oversight of the MSU-Great Falls College of Technology. As a business leader it makes little sense to me to have the Bozeman two-year education unit operating under the administration of the Great Falls education unit, which operates under the administration of MSU-Bozeman. Surely the proposed change would be a more efficient system of management.

I think it also important to consider the needs of local businesses. In the local hospitality industry we have employment needs that could be addressed by one or two-year education programs at a local College of Technology. These types of educational programs have been very helpful to me in my previous business operations in other states.

Again, I wholeheartedly support the MSU proposal regarding two-year education.

Sincerely,



Mike Hope  
Owner & Manager



910 Technology Blvd.  
Suite A  
Bozeman, MT 59718  
406.556.0272  
FAX.556.0969  
www.techranch.org

April 15, 2010

Montana University System Board of Regents  
Office of Commissioner of Higher Education  
2500 Broadway Street  
Helena, MT 59620-3201

Board of Regents,

TechRanch, a leading Montana business development assistance organization that focuses on the high tech sectors, supports the proposal to authorize Montana State University-Bozeman to assume responsibility for two-year education in the Gallatin Valley. The current structure of administration of these one and two-year programs through Montana State University-Great Falls College of Technology seems to lack efficiency, stretch resources and inhibit the local involvement that would come from having Montana State University-Bozeman assume this responsibility.

In our work with technology start-up companies we are aware of the workforce development needs that these companies face. While these companies often hire Bachelors level graduates, you also find many Associate level graduates working in technology based companies. The lack of these two-year programs in the Bozeman area creates a lost opportunity for potential workers and employers alike. Given the large number of technology related companies in the Bozeman area, the development of a variety one and two-year programs in computer information technology would be a great benefit.

The MSU proposal on two-year education is fully supported by TechRanch.

Sincerely,

John O'Donnell  
Executive Director

# BELGRADE HIGH SCHOOL

*Home of the Panthers*

TELEPHONE: 388-6862  
FAX 388-4633

SCHOOL DISTRICT NO. 44  
303 NORTH HOFFMAN  
BELGRADE, MONTANA 59714

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April 14, 2010

Montana Board of Regents  
Office of the Commissioner of Higher Education  
2500 Broadway Street  
PO Box 20301  
Helena, MT 59620-3201

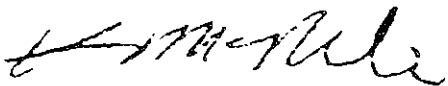
Montana Board of Regents:

This letter is offered to support the proposal by Montana State University-Bozeman to assume responsibility for two-year education in Gallatin Valley. For a number of years one of our Counselors, Skip Gunlikson, has been an active member of the College of Technology in Bozeman's (MSU-Great Falls Extension) Advisory Board. In this capacity, the counselor has developed a respect for the work being conducted at the College of Technology while recognizing that the current administrative structure creates numerous obstacles to effectively serving students. There are frequent issues COT students encounter when accessing services due to the distance from MSU-Great Falls COT. The transition to MSU-Bozeman will go a long way to alleviating these problems.

Our schools interest in expanded one and two-year educational programs comes from the experience of many of our graduating seniors that are not interested in attending a four-year University and have limited local two-year options. These students are left with the choice of relocating or commuting to attend a two-year college. Unfortunately, these obstacles get in the way of many of these students pursuing this level of education.

The continued development of these one and two-year programs would be a great benefit to the graduates of Belgrade High School. We support the MSU two-year education proposal as a step in this direction.

Sincerely,



Kevin McNelis, Principal  
Belgrade High School

Providing Quality  
Building Materials  
since 1954



Empire Building Materials, Inc.

Phone: (406) 587-3191  
- Outside MT -  
1-800-548-8201  
- Inside MT -  
1-800-332-4577  
- Fax -  
(406) 587-3144

P.O. Box 220 • 608 East Main • Bozeman, MT 59771-0220

April 9, 2010

RE: Letter of Support for MSU Proposal

TO: Montana University System Board of Regents

On behalf of Empire Building Materials, it is my pleasure to write this letter of support for the transition of responsibility for two-year education from Montana State University-Great Falls College of Technology to Montana State University-Bozeman. Currently the College of Technology extension in Bozeman is administered through the Great Falls College of Technology, creating a challenging structure for students and staff and an identity issue within our community. It only makes sense to me that these programs be administered and developed under the leadership of the Montana State University - Bozeman campus.

As a local business leader, I recognize the need for expanded one & two-year education programs in Gallatin and Park Counties. These additional programs would be a great asset for our local industries and also meet the education and training needs of a large number of potential students.

I am pleased that the Montana State University administration has shown this commitment to two year education by submitting their request for your consideration. I encourage you to support this transition so the business community, local officials and Montana State University can work together to further develop this resource for our community.

Sincerely,

A handwritten signature in black ink that reads 'Anthony Tangaro'. The signature is written in a cursive, flowing style.

Anthony Tangaro  
General Manager  
Empire Building Materials





April 16, 2010

To: Board of Regents  
Montana University System

FR: Chris Naumann, Executive Director  
Downtown Bozeman Partnership

Re: MSU-Bozeman Two-Year Education Proposal

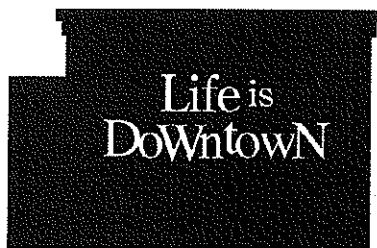
The Downtown Bozeman Partnership supports the Montana State University proposal to assume responsibility for two-year education in the Bozeman area. MSU-Bozeman is the only campus of the Montana University System that does not have a two-year college in its mission or structure. We have long felt that our community would benefit from expanded two-year degree programs. Businesses I work with often comment on the lack of skilled and educated workers for many of their jobs.

As an advisory board member of the City of Bozeman Economic Development Plan, I cannot stress the importance MSU-Bozeman to our community's economic success. The recently adopted Downtown Improvement Plan acknowledges the economic vitality that MSU brings to Bozeman's historic Main Street district. Incorporating two-year degree workforce education into the MSU-Bozeman structure would provide employers with the skilled labor they need to grow their business. A MSU-Bozeman two-year college program would also send a strong signal to businesses considering relocating to Bozeman and to new business ventures.

I am aware of the College of Technology in Bozeman and the current organizational structure which has the operations located under the MSU Great Falls College of Technology. This arrangement seems incongruent with MSU-Bozeman's reputation as a comprehensive university. Establishing a two-degree program within the MSU-Bozeman structure would further establish the university as a critical economic engine for downtown and the entire Bozeman community.

I am pleased that MSU-Bozeman wants to step in and administer the two-year programs locally, and think it would be a good decision on the part of the Board of Regents to support this proposal.

Thank you for your time and consideration of my comments.



DOWNTOWN BOZEMAN PARTNERSHIP  
224 EAST MAIN STREET  
BOZEMAN, MONTANA 59715  
p. 406.586.4008  
f. 406.586.3882  
[www.downtownbozeman.org](http://www.downtownbozeman.org)

April 21, 2010

Montana University System Board of Regents

2500 Broadway Street

PO Box 20301

Helena, MT 59620-3201

Regents,

I am writing to urge you to support the proposal put forth by Montana State University to change administrative oversight of the College of Technology in Bozeman, from MSU-Great Falls College of Technology to MSU-Bozeman. As the General Manager of Gibson Guitars Acoustic Division, located in Bozeman, I see many labor needs that could be met through two-year education programs. In my work in other states I have seen the Associate Degree Programs of Community Colleges play a critical role in the development of a local workforce. These programs put out the carpenters, designers, computer technicians, sales and marketing workers and many other graduates that can be hired locally in a manufacturing business like Gibson Acoustic Guitars.

The current College of Technology in Bozeman operates as an extension of the Montana State University-Great Falls College of Technology. This seems like an inefficient approach that doesn't maximize the resources that are available at MSU-Bozeman. I think the request by MSU-Bozeman to step in and assume responsibility for two-year education creates a better administrative structure that the people of both Bozeman and Great Falls would support.



Douglas P. Koffinke

General Manager, Gibson Acoustic



May 4, 2010

Board of Regents Montana University System

Regarding: MSU Two-Year Education Proposal

The Bozeman Area Chamber of Commerce would like to express support for the proposal by Montana State University-Bozeman to assume responsibility for two-year education in Gallatin Valley. MSU President Waded recently attended a Chamber of Commerce Board of Directors meeting and discussed the MSU proposal. The Board Members responded very favorably to her presentation.

Our members frequently mention the need for local one and two-year education programs. This interest comes from a variety of industries, including: healthcare, manufacturing, technology, hospitality, building trades and professional services. Given the history of economic growth in our area and the population base that could be served by two year education in this part of the state, an expansion of these programs is merited.

The proposed organizational change makes sense as the administrative oversight that MSU-Great Falls College of Technology has provided is bound to be less efficient and less integrated with the needs of the local community. The combination of the administrative support of MSU-Bozeman, the support for two-year education from our local business community and the current programming that is being offered at the COT in Bozeman creates a powerful synergy for the development of two-year educational programs.

The Bozeman Area Chamber of Commerce enthusiastically supports the MSU proposal to assume responsibility for two-year education in Gallatin Valley.

Sincerely,

Daryl W. Schliem  
President/CEO  
Bozeman Area Chamber of Commerce  
[dschliem@bozemanchamber.com](mailto:dschliem@bozemanchamber.com)  
406 - 595 - 1448

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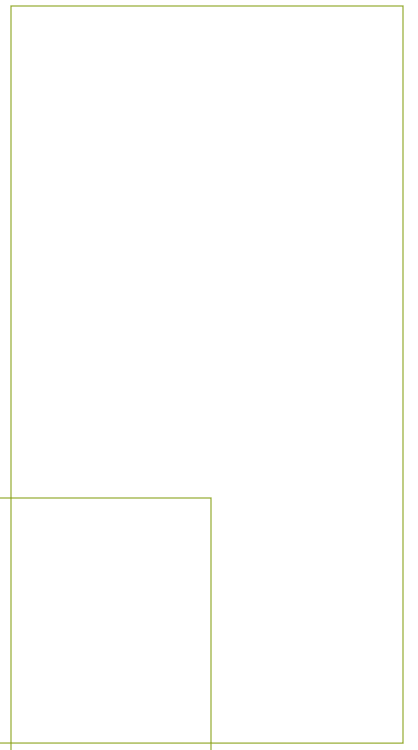
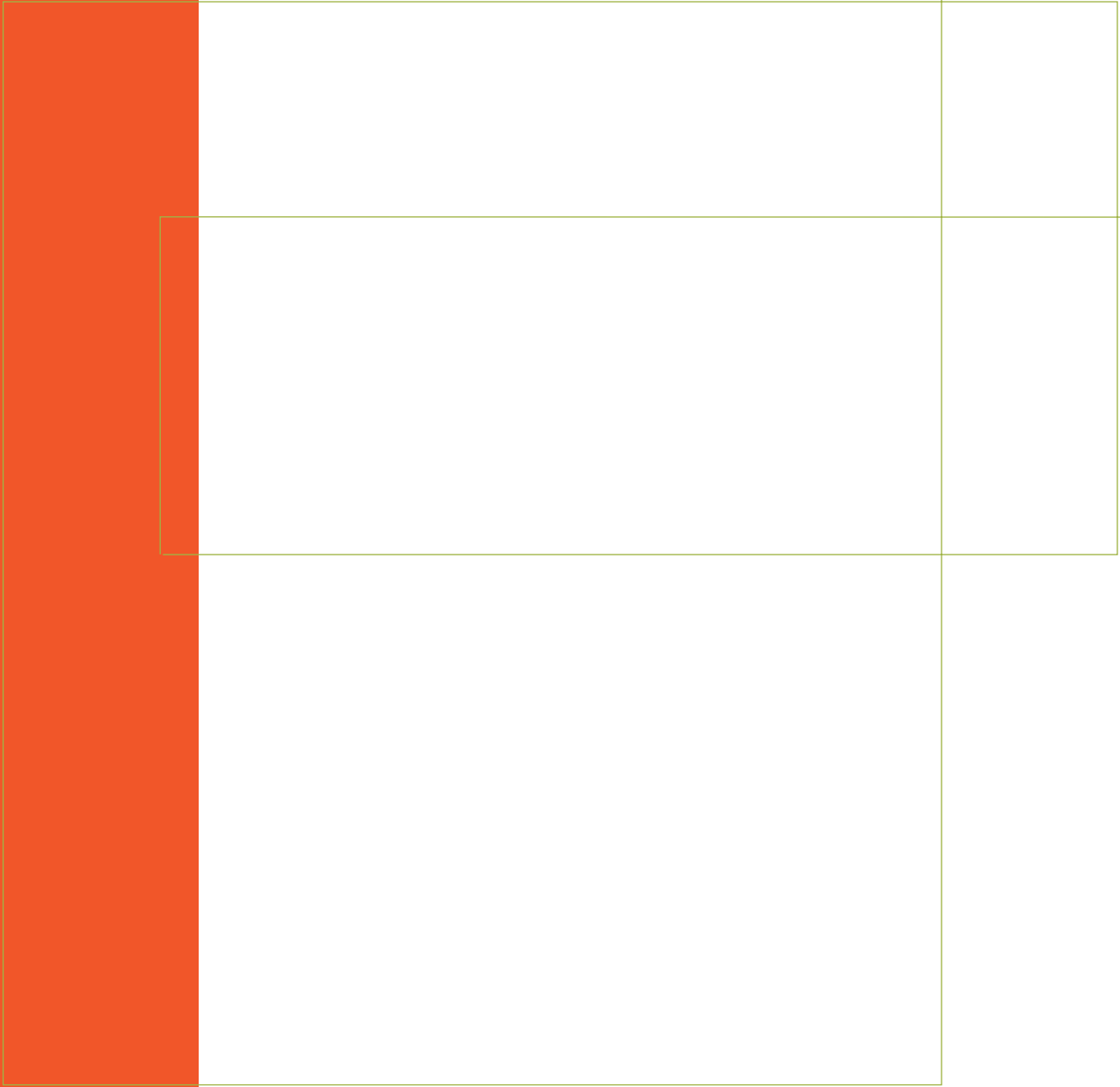
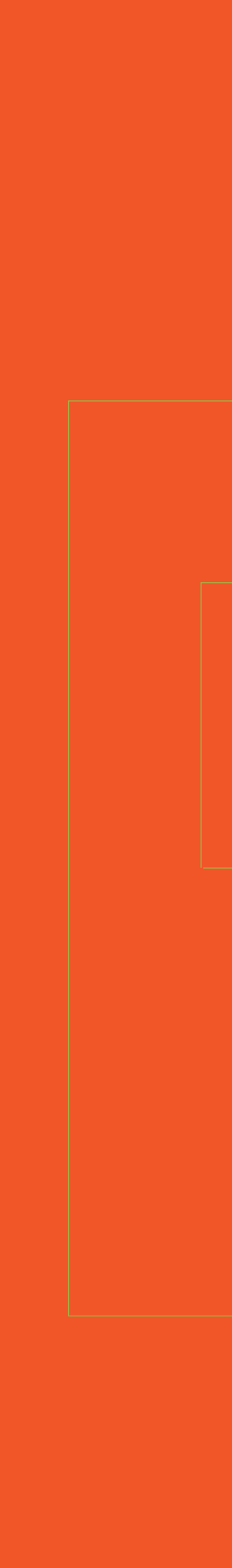
Bozeman Area Chamber of Commerce  
2000 Commerce Way • Bozeman, MT 59715  
406-586-5421 • 406-586-8286 (fax)  
[www.bozemanchamber.com](http://www.bozemanchamber.com) • [info@bozemanchamber.com](mailto:info@bozemanchamber.com)

# Gallatin Valley Environmental Scanning Report 2006



***Workforce Needs and Occupational Preparation Assessment***

Prepared by the College of Technology in Bozeman -  
An Extension of MSU- Great Falls College of Technology





# OVERVIEW



In preparation for future development of the College of Technology in Bozeman, its services and subsequent degree and certificate programs, the College has engaged in a comprehensive environmental scan to assess the current and projected workforce needs of the Gallatin Valley.

In partnership with groups such as the Gallatin Valley High School Counselors, Bozeman Chamber of Commerce, Gallatin Development Corporation, and the Bozeman Job Service, the scanning process was conducted over the course of the spring and summer of 2006.

Three (3) primary sources of data were used for this scanning process. These include (1) Gallatin Valley High School Student Survey, (2) Gallatin Valley Workforce and Business Survey, and (3) Montana Department of Labor Workforce Statistics. A summary of the sampling and findings from each source follows.



# GALLATIN VALLEY HIGH SCHOOL STUDENT SURVEY

To assess the need and interest from high school students in the services provided by a Career Center (Career Centers are high school level institutions where students from many schools can take classes to develop employment skills, while working on their high school diploma, and preparing for college) the Gallatin Valley High School Counselors surveyed students at Bozeman, Belgrade, Bridger and Three Forks High Schools. The survey included a total of 1,773 student responses and spanned grades 9 through 12. Results are highlighted in Figures 1-4.

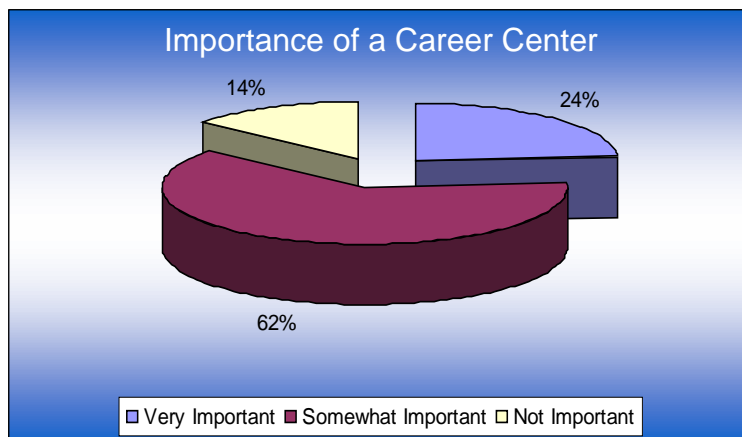
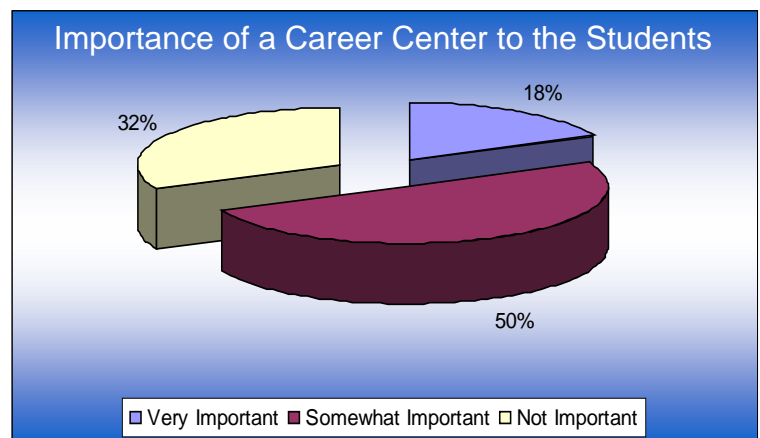


Figure 1

When asked how important a career center was for their school district, the majority of students (1524) thought it was either somewhat or very important.

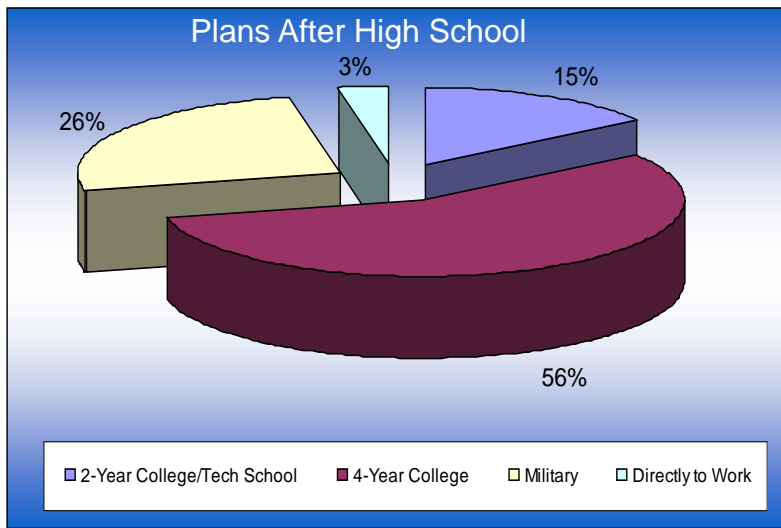
Figure 2

When asked how important a Career center was for their own success, a majority (1202) of students thought a career center was at least somewhat important to them personally. A substantial number (558) responded that it was not important.



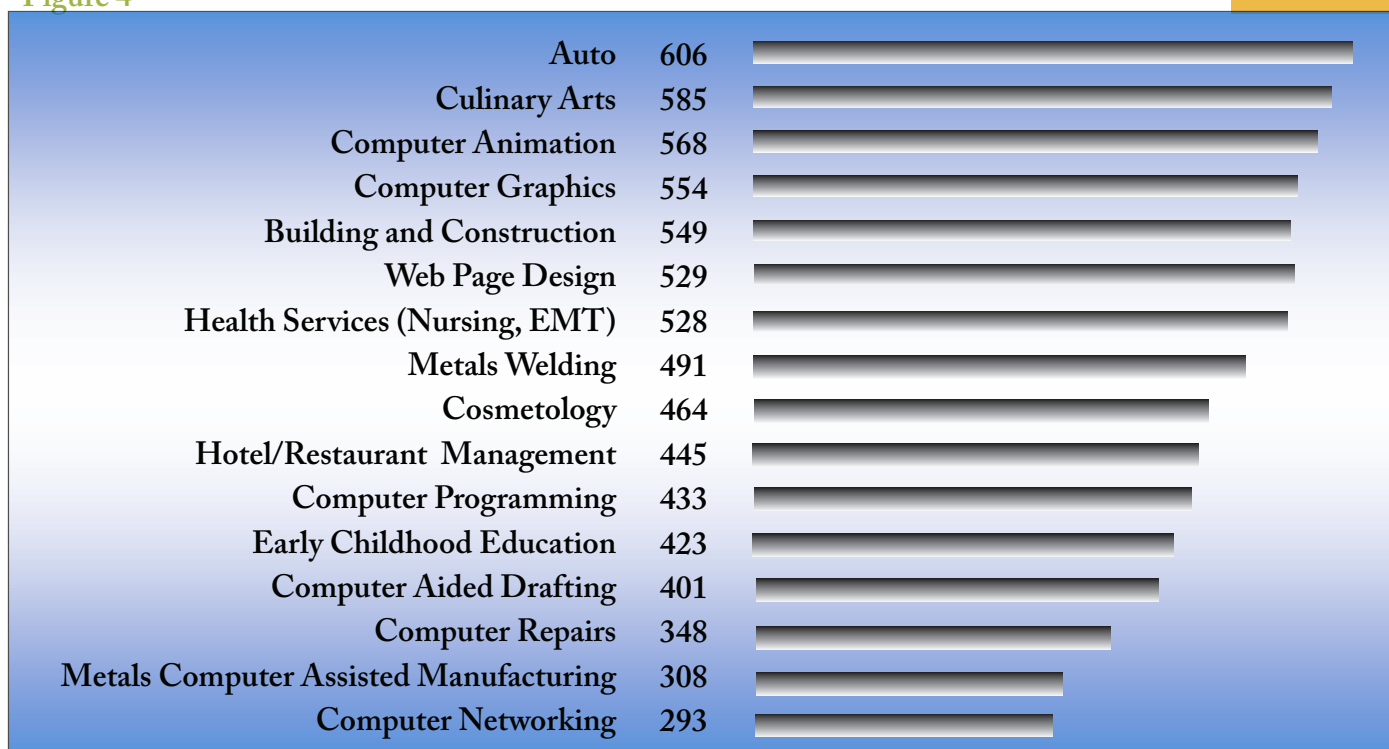
When asked what their plans were for after high school (illustrated in Figure 3), the majority planned to attend a 4-Year College, with a significant second stated they would enter the military. 15%, or 267 students, said they were planning on attending a 2-year college or technical school.

Figure 3



Students were asked about which courses or program type they would be interested in as part of their high school curriculum. These results are illustrated in Figure 4.

Figure 4





# GALLATIN VALLEY WORKFORCE SURVEY

Prior to developing and implementing workforce training and degree programs not available in the Gallatin Valley, the College recognized that decisions must be based on sound data and feedback from the business community. Direct input from business and industry leaders was a key first step. In partnership with the Chambers of Commerce in the Gallatin Valley and the Gallatin Development Corporation, a survey was implemented to gather information on business/industry workforce needs and items related to training, education and business. The survey was available on a voluntary basis to the business community during the months of June and July 2006.

**The following are some quick facts about the respondents:**

- 133 different businesses responded to the survey.
- Top industries represented were Professional Services (28%), Manufacturing (15%), Construction (11%), Retail (8%), and Hospitality/Tourism (8%).
- The majority, 81%, were male-owned businesses, compared to 19% that were female-owned.
- Only three (3) of the businesses responding were minority-owned (2.2%).
- 35% of the businesses grossed between \$1.1 and \$5 million annually, while the majority of the respondents, or 49%, grossed less than \$1 Million.
- The majority (61%) of the responding businesses were established between 1976 and 2000, while businesses established after 2000 made up the second highest response group (28%).
- The two top reasons for businesses choosing to locate in the Gallatin Valley were quality of life (61%) and a good business climate (37%). Being near home (24%), proximity to customers (18%), and environmental reasons (16%) were also substantial responses.
- Most respondents said their industry as a whole was experiencing growth in business (79%), as compared to 3% experiencing some form of decline in business.

## Industry Type Representation

Figure 5

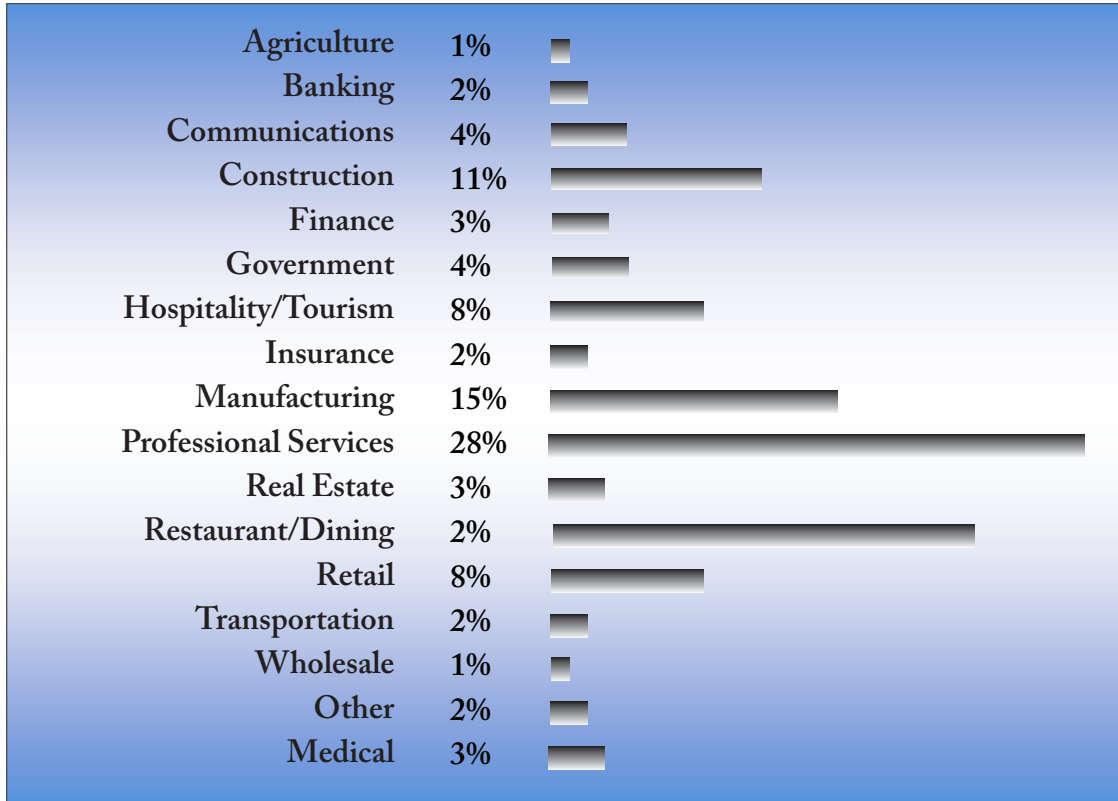


Figure 6

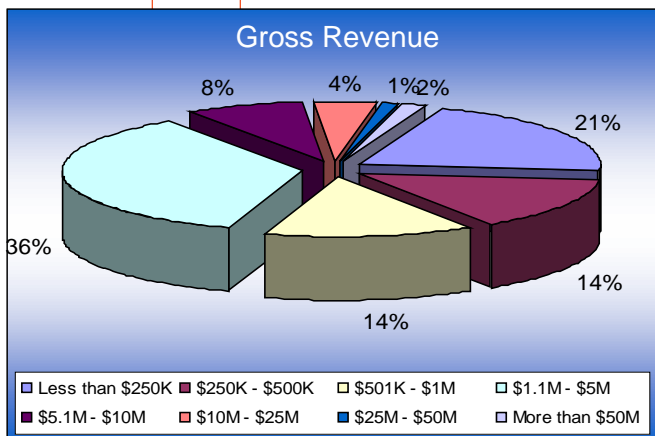
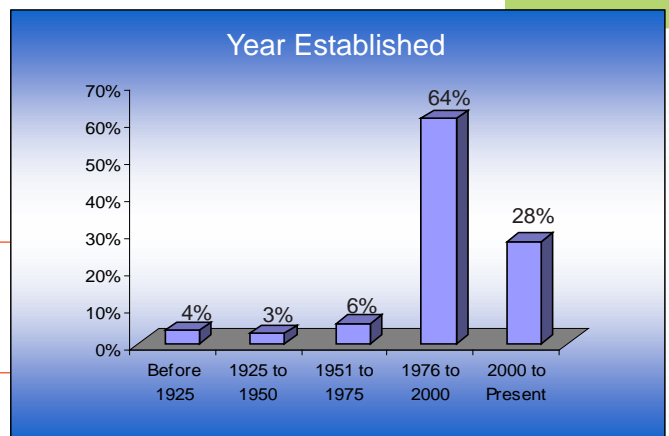


Figure 7



# GALLATIN VALLEY WORKFORCE SURVEY

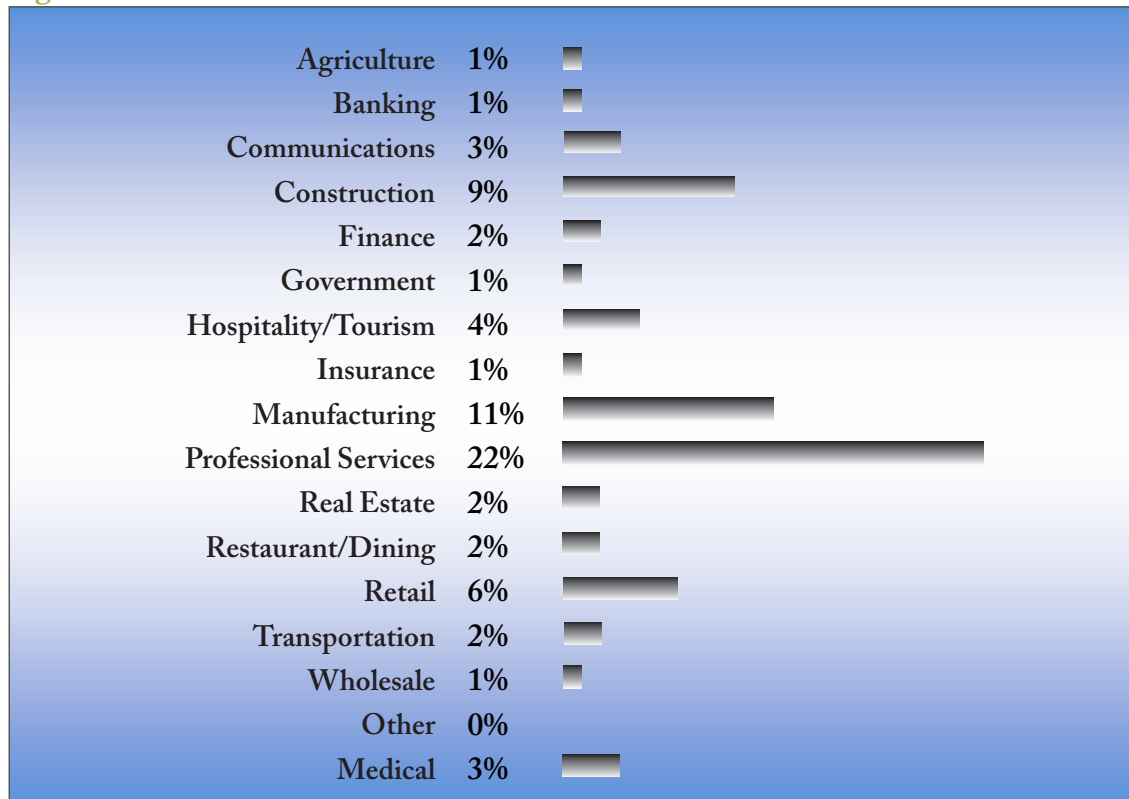
Subsequent questions within the survey asked the businesses to provide general data about their workforce. The following is a summary of the businesses' responses to these questions.

- Most of the respondents (85%) said they do hire entry-level workers, with the majority of these workers receiving an hourly wage between \$9-\$15 (68%)
- Average hourly wages of all their employees were higher, with just under half (46%) at the \$9-\$15 range, and just slightly more provide over \$16/hr (27% \$16-\$20 and 21% over \$20/hr)
- Nearly three-quarters of the respondents, or 72%, said their workforce has expanded over the past five years.
- Of the businesses experiencing a growing workforce, 70% say this is due primarily to increased sales and/or demand for their product or service.

## Industry Distribution with Expanded Workforce

Figure 8 shows the industry distribution of businesses experiencing a growing workforce. This distribution is similar to the overall distribution of all responding businesses.

Figure 8



Almost all businesses expect some form of growth in both full-time and part-time employees over the next five years. The growth by job category is highlighted in Figures 9 and 10.

Figure 9

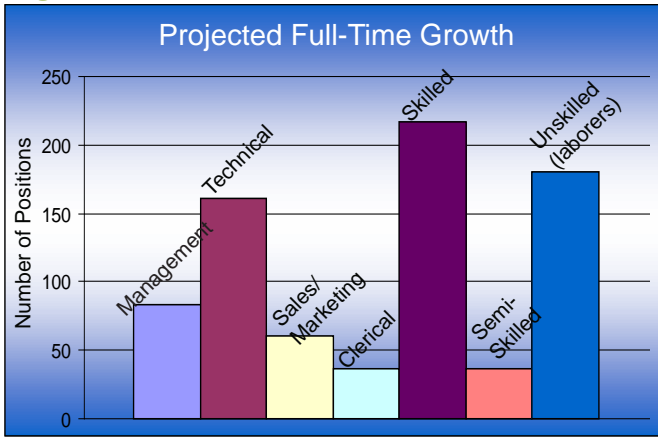
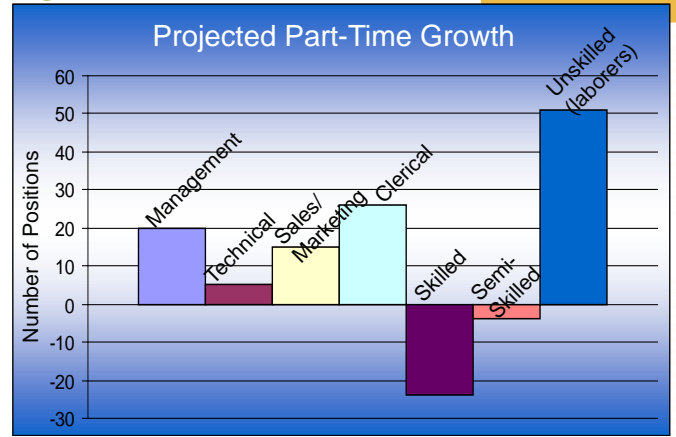
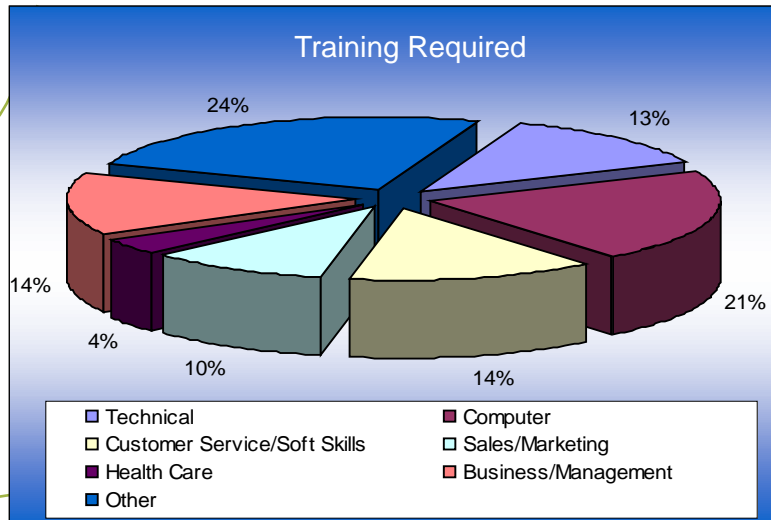


Figure 10



- For both current and future jobs, most businesses (95%) reported the need for employee training. 91% of the businesses provide in-house training for new positions, whereas only 77% provide in-house training for current positions
- 75% of the respondents state that they have a group of employees that could use specific training to upgrade their skills. As illustrated in Figure 11, the type of training required is fairly well distributed across the categories of Technical, Computer, Soft Skills, Business/Management and Sales/Marketing.
- Nearly 70% of the businesses that responded said they were experiencing difficulties recruiting employees with adequate skills. As a result, of those experiencing difficulties, 30% are experiencing an inability to expand, 26% a decline in service quality, and 26% a decrease in productivity.

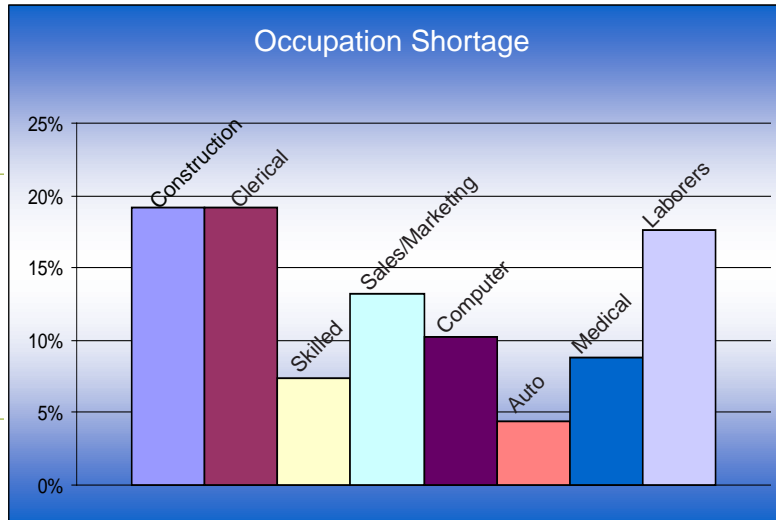
Figure 11



# GALLATIN VALLEY WORKFORCE SURVEY

When asked to list the occupations in which they were experiencing the greatest shortage, the main shortage areas reported were construction-related occupations, such as welders and carpenters; clerical occupations, especially financial and bank teller positions; and general laborers, as shown in Figure 12.

Figure 12

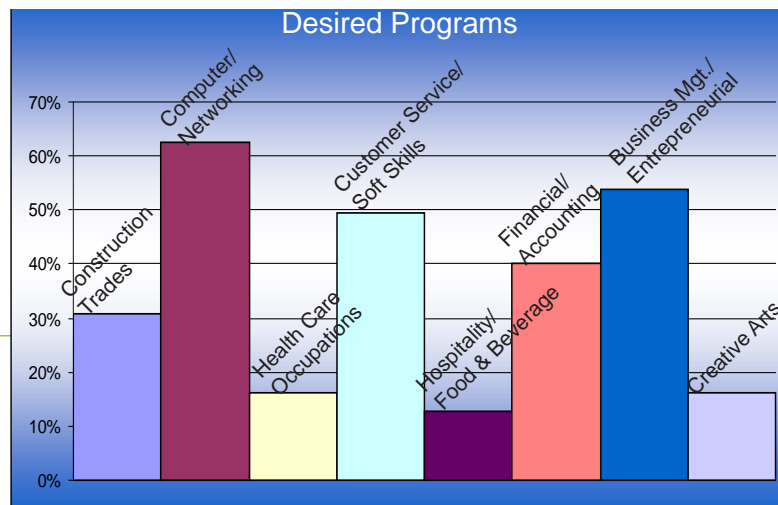


When asked about the availability of different types of employees, respondents typically rated the availability of Professional/Management, Clerical, Sales/Marketing and Technical as being fair. For availability; Skilled, Semi-Skilled and Unskilled Laborers rated poorly.

Businesses were asked to choose what vocational, technical or other training programs they would like to see available in the Gallatin Valley. Figure 13 illustrates the choices of the 117 people who answered the question.

1. Computer/Networking programs – 62%
2. Business Management/Entrepreneurial Programs – 54%
3. Customer Service/Soft Skills programs – 50%
4. Financial/Accounting Program – 40%
5. Construction Trades Programs – 31%

Figure 13



# GALLATIN VALLEY WORKFORCE SURVEY

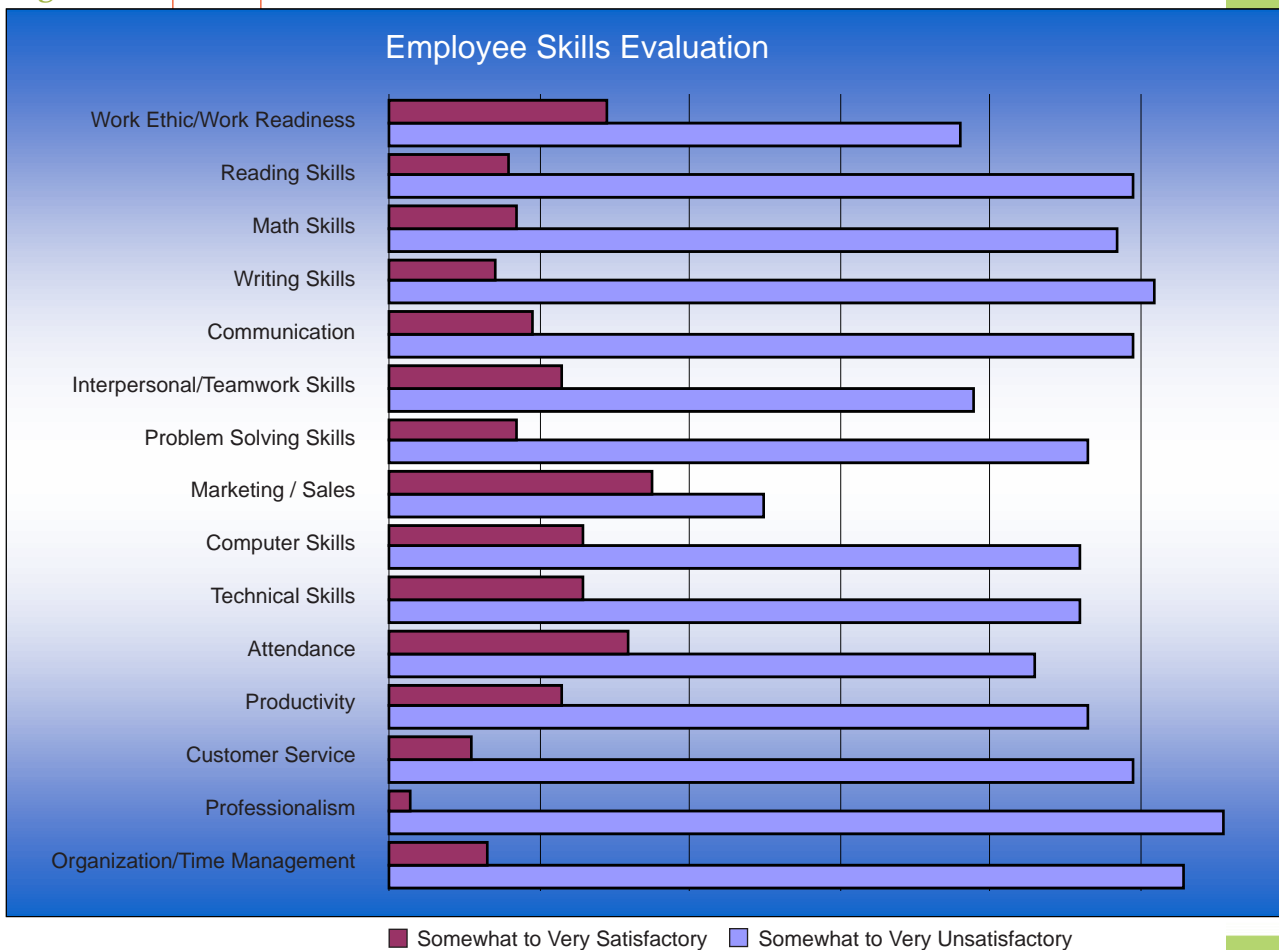
## Workforce Evaluation

Businesses were asked to provide their opinions and evaluation of the overall workforce in the Gallatin Valley. This was summarized within a few specific questions.

When asked what skills or competencies their employees need to improve or obtain to make their business more competitive, the respondents noted a variety of skills as being near equally important, as illustrated in Figure 14.

1. Work Ethic/Work Readiness – 53%
2. Organization/Time Management – 52%
3. Interpersonal/Teamwork Skills – 51%
4. Problem Solving Skills – 51%
5. Communication – 48%
6. Marketing/Sales Skills – 44%
7. Computer Skills – 44%
8. Customer Service – 44%
9. Professionalism – 41%

Figure 14



# GALLATIN VALLEY WORKFORCE SURVEY



## Workforce Evaluation

In contrast, businesses rated certain core skills very low in terms of what their employees need to improve or obtain to make their business more successful.

1. Reading Skills – 11%
2. Math Skills – 17%
3. Writing Skills – 27%

The majority of respondents rate their employees' current skill levels as fair to good in nearly all areas, with Reading Skills, Attendance, Work Ethic/Work Readiness, and Problem Solving Skills heading the majority list as Very Satisfactory. Nearly all others had majority responses of either somewhat satisfactory or better.

When asked whether or not the respondents thought the educational resources in the Gallatin Valley adequately prepare students to enter the workforce, over half (53%) stated no, while just under half (47%) indicated that they thought resources were adequate.

A follow-up question asked which areas saw the greatest need for improvement (either more programming or better programming). The High School Level was the main response at 33%, with Bachelor's Degree second at 25% and Technical School (Associate Degree Level) a close third at 21%.

Short-term training (continuing education or certification) received a fair response at 15%.

While training is integrated into many of the businesses that responded to the survey, when asked if they used local job training programs, the majority (81%) reported that they did not. This may be due to the fact that such a large percentage of the respondents reported doing in-house training.



# MONTANA DEPARTMENT OF LABOR WORKFORCE STATISTICS

The final source of information gathered for the purpose of this scanning project included standard labor statistics and future projections from the State and Federal Governments for Southwest Montana. Neither Bozeman nor the Gallatin Valley is yet a Metropolitan Statistical Area (MSA), therefore, the closest proximity to local labor data and statistics was to look at Southwestern Montana, which does include other major communities, such as Butte and smaller ones like Dillon. The Bozeman Job Service played an integral role in assimilating this data and added in customized statistics on occupations such as current job orders or openings posted with the Job Service by employers.

The primary purpose of evaluating this data source was to look at occupations that have a high number of openings (current demand), are projected to experience significant growth, will have significant openings in the future from either growth or retirements, can be developed and supplied through technical or vocational programming, or reflect some combination of these characteristics. The following is a brief list of some of the top candidate occupations. This list is not exhaustive, nor necessarily ranked in any order of priority and should be used in conjunction with other information such as that gathered in this process or through other interactions with the community prior to making decisions about the investment into the development of programs.

... statistics continued on next page





# MONTANA DEPARTMENT OF LABOR WORKFORCE STATISTICS

Program Area	Occupation	# Openings 05-06	Projected Growth	Average Annual Openings
<b>Computer Information Technology</b>				
Microcomputer Support	Computer Support Specialist	14	28%	66
Computer Networking	Network & Computers Systems Admin	1	33%	20
Computer Graphic Design	Graphic Designers	3	23%	33
<b>Pre-School and Education</b>				
Education Assistant	Teacher Assistants	30	13%	134
Education Assistant	Child Care Workers	30	19%	501
<b>Office and Administrative Specialists</b>				
Business Finance Assistance	Bookkeeping, Accounting & Auditing Clerk	51	2.1%	182
Executive Assistance	Executive Secretaries & Admin Assistants	107	10%	166
Executive Assistance	Secretary (except Legal, Medical & Exec)	15	-1%	147
Legal and Law Assistance	Legal Secretaries	7	24%	32
Medical Office Assistance	Medical Records and Health Info Techs	5	46%	34
Medical Office Assistance	Medical Secretaries/Office Managers	11	14%	40
<b>Culinary</b>				
Food Service Management	Food Service Managers	3	20%	112
Food Service Management	First-Line Supervisors/Managers	7	25%	121
Culinary Arts	Chefs & Head Cooks	2	27%	37
Culinary Arts	Cooks (all types)	42	~22%	561
Culinary Arts	Food Preparation Workers	25	23%	210
Culinary Arts	Bartenders	3	21%	277
<b>Medical and Health Care</b>				
Medical Lab Technology	Medical & Clinical Lab Technologists	1	21%	30
Medical Lab Technology	Medical & Clinical Lab Technicians	4	21%	14
Pharmacy Technology	Pharmacy Technicians & Aides	1	38%	29
Radiologic Technology	Radiologic Technologists & Technicians	0	25%	31
Emergency Medical Tech	EMT and Paramedics	0	33%	24
Practical Nursing	LPN & Licensed Vocational Nurses	6	17%	88
Practical Nursing	Registered Nurse (AAS Degree)	15	33%	431
Nursing Assistance	Home Health Aids	9	37%	123
Nursing Assistance	Personal and Home Care Aides	12	44%	215
Nursing Assistance	Nursing Aides, Orderlies & Attendants	4	27%	217
Medical Assistance	Medical Assistants	1	53%	63
Medical Transcription	Medical Transcriptionists	0	20%	20
Physical Therapy Assistant	Physical Therapy Aides	1	49%	9
Veterinary Technology	Vet Assistants & Laboratory Animal Care	0	33%	12
Veterinary Technology	Vet Technologist & Technicians	0	48%	10
<b>Construction and Trades</b>				
Construction Management	Construction Managers	7	37%	160
Construction Technology	Carpenters	95	32%	618
Construction Technology	Helpers – Carpenters	21	43%	55
Construction Technology	Construction Laborers	114	34%	244
Metals Fabrication	Welders, Cutters, Solderers & Brazers	7	13%	41
Metals Fabrication	Welding, Soldering & Brazing Machining	1	-6%	5
Metals Fabrication	Metal Workers and Plastic Workers	1	1%	78
Metals Fabrication	Machinists	6	7%	23
Landscaping Technology	Landscaping & Groundkeeping Workers	71	26%	264
Landscaping Technology	First-Line Supervisors/Mgrs Landscaping	0	35%	28
Facilities Management	Property, Real Estate & Assoc Managers	5	42%	135
Automotive Technology	Automotive Technicians	Unknown	22%	190
<b>Business Management &amp; Entrepreneurship</b>				
Interior Design Technology	Interior Designers	0	39%	8
Retail Sales and Management	First-Line Supervisors Retail & Non-Retail	33	8%	304
Retail Sales and Management	Retail Sales and Marketers	77	14%	888
Office Management	First-Line Supervisors/Mgrs Office	9	9%	110

*Note: The Openings listed above are actual jobs posted with Job Service in 2005/06  
The Projected Growth above is anticipated employment growth for southwest Montana.*

# Report Conclusions and Considerations

## Lack of Skilled, Semi-Skilled, and Unskilled Employees

The results of the Gallatin Valley Workforce and Business Survey show that most of the businesses who responded feel there is adequate access to professional/management, some clerical, technical and sales/marketing qualified employees, even though none rated excellent. Most likely due to the highly educated community being developed by the Montana State University presence and the highly desirable quality of life that is attracting folks to the community. However there are indications that access to some Clerical, most Skilled, Semi-Skilled, and Unskilled workers is very inadequate.

In fact, many businesses (nearly 70%) said they were experiencing difficulties recruiting employees with adequate skills, and of those respondents, 30% are experiencing an inability to expand, 26% a decline in Service Quality, and 26% a decrease in productivity.

Compounding this issue, of the students (from Belgrade, Bozeman, Three Forks, and Bridger) who responded to the Gallatin High School Survey, 267 of them (about 15%) that said they were going to a 2-Year College/Technical school when they graduate. These institutions provide much of the programming needed to build a skilled workforce, however Bozeman and the surrounding area is the only major community in Montana without one of these institutions. So that means that 267 students are LEAVING the Bozeman area to go to a 2-Year or Technical College, many of which may not return to the Valley.

Looking at stated projections and Department of Labor statistics for occupational growth, there will be a significant demand and growing workforce in the Valley. Identified by the respondents, the areas where most growth is anticipated is in the Technical, Skilled and Unskilled areas, and this is mirrored by the projections by the Department of Labor. However respondents are already reporting shortages in many of these areas such as Construction, Computer Technology, Medical, Sales, Management and Services.

**F**inally, in many of the open ended questions or additional comment areas, respondents to the Workforce and Business Survey voice a concern about having to adjust wages to accommodate for the cost of living in the Gallatin Valley. However, many jobs that do provide good wages (the majority of respondents reported wages of over \$16/hour) go unfilled due to lack of a qualified workforce.

It is evident and common knowledge that Bozeman and the Gallatin Valley are going through unparalleled growth in Montana.

With the growth and prosperity come unique challenges for the business community, local and state government, and education providers.

One of these is access to a skilled workforce and the results of this scanning process give insight to some aspects of this challenge.

## Interest, Demand and Need for Technical Programming



Conclusions drawn above relating to the interest of high school students in both career center and technical education during and after high school, the lack of these opportunities in the Gallatin Valley, the growing demand and shortage of the workforce typically prepared by this type of education, all provide endorsement for the decision to expand the College of Technology in Bozeman.

Over half (53%) of the businesses that responded said in their opinion the educational resources in the Gallatin Valley do not adequately prepare students to enter the workforce. Surprisingly, 33% of those folks said the most need for improvement was at the

High School level, but the next largest, 25% said at the Technical School level. These findings support the above statements.

With this knowledge, and the results of the scanning process, the following are considerations for programming options to explore and possibly develop for the Gallatin Valley.

### Construction Trades

549 or 31% of the students surveyed said they would be interested in Building and Construction programming. Likewise the 31% of the businesses responding stated they would like to see the programs offered in the Gallatin Valley. Finally, labor statistics support the current and projected demand for these occupations, especially carpentry, welding or metals fabrication and construction management.

### Culinary Arts

585 or 33% of the students surveyed said they would be interested in Culinary Arts programming. In addition 445 or 25% said they would be interested in Hotel/Restaurant management programming. The labor statistics and anecdotal information suggest there is a large demand for all forms of food service and preparation professionals now and projected in the future. These may range from culinary operation management to professional chef or cook.

### Office and Administrative Specialists

Reponses from the workforce and business survey referred to the need (both current and projected) for qualified administrative (clerical or semi-skilled) employees. Looking specifically at the labor statistics, there is a diversity of occupations within this field that have current and projected demand. Areas to consider would include bookkeeping, accounting, auditing, executive secretaries, administrative assistants, legal secretaries, medical records, secretaries and office managers. The financial area may be an ideal place to start as 40% of the businesses who responded said they would like to see this type of programming available in the Gallatin Valley.

### Computer Information Technology

413 or 24% of the students surveyed said they would be interested computer information technology programming and 62% of the businesses who responded to the workforce and business survey stated they would like to see computer/networking programs offered in the valley. Finally, labor statistics suggest a large number of openings, and significant growth in fields such as microcomputer support, computer programming, networking, and computer graphic design. All should be considered.

Over half (53%) of the businesses that responded said in their opinion the educational resources in the Gallatin Valley do not adequately prepare students to enter the workforce.

Surprisingly, 33% of those folks said the most need for improvement was at the High School level, but the next largest, 25% said at the Technical School level.

## **Business Management**

54% of the businesses who responded to the workforce and business survey stated they would like to see Business Management/Entrepreneurial programming offered in the Gallatin Valley. In addition, labor statistics illustrate a significant current, and very significant projected demand for a variety of First-Line managers and supervisors in different aspects of the product and service industries. Some areas to consider include retail, sales or marketing management, business entrepreneurship, or office management. Some room for specialization could be developed into a degree program built on foundational coursework that would be highly compatible with the many industries in need of these individuals.

## **Early Childhood Education**

423 or 24% of the students surveyed said they would be interested in Early Childhood Education programming. Labor statistics project that there will be a significant demand for occupations such as Teacher Assistants and Child Care workers in the future and this type of programming may be an ideal ladder opportunity between high school, to 2-year education, and onto 4-year bachelor or even master degrees.

## **Automotive Service Technology**

606 or 34% of the students surveyed said they would be interested in Auto repair and refinishing programming. Businesses who responded to the workforce and business survey stated that one of the areas there was an occupational shortage was in the automotive service industry and their claims seem to be supported by the labor statistics which project a significant number of available jobs annually in this area.

## **Medical and Healthcare**

528 or 38% of the students surveyed said they would be interested in Health Services programming such as nursing or EMT. Some of the businesses responding reported the lack of qualified medical workers in the community. With the aging population of Montana and labor statistics which identify a current need and significant projected growth for medical and healthcare occupations, it would be valuable to consider programs such as medical and lab technology, Certified Nurses Assistant, Personal Care Assistants, Medical Assistants, and Pharmacy Technology. Significant interest has also been expressed in the development of a Veterinary Technology program that could be a good partnership with industry and Montana State University-Bozeman.



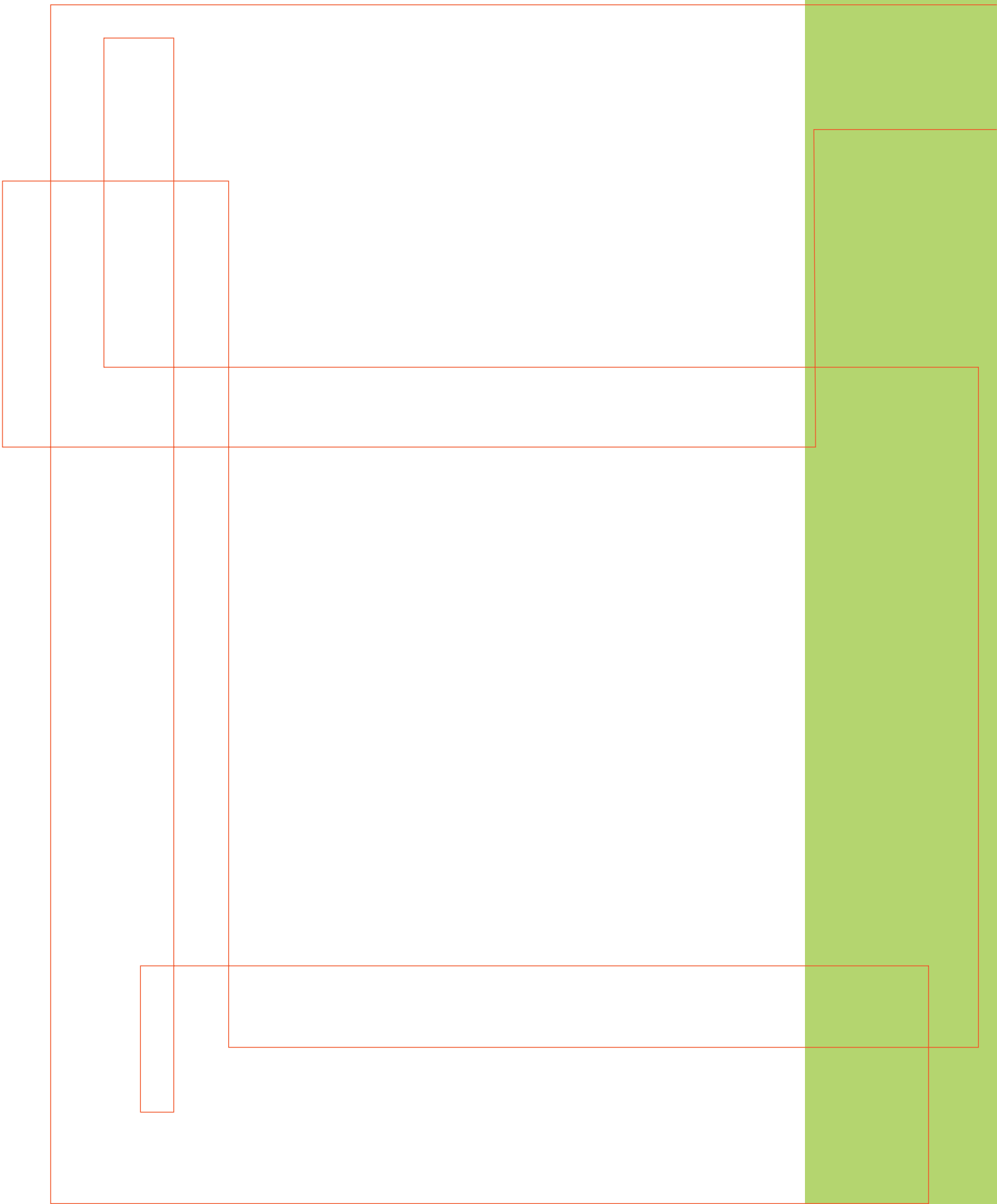




### Thank you . . .

The College of Technology in Bozeman would like to extend a special note of thanks to the following organizations and individuals who assisted in this project:

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- Dr. Christina Fastnow and Montana State University's Department of Planning and Analysis
- Gallatin Valley High School Counselors
- Belgrade Chamber of Commerce
- Livingston Chamber of Commerce



# Gallatin Valley Environmental Scanning Report 2006

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