

Catt
JB
G

**SPECIAL AND REGULAR MEETINGS
OF THE
RAVALLI COUNTY BOARD OF COUNTY COMMISSIONERS**

REGULAR MEETING 9:00 AM

Monday, August 31, 2020

**Commissioners' Meeting Room
County Administration Building,
215 S. 4th St, Hamilton, MT 59840.**

1. Roll Call

Commissioner Chris Hoffman, Commissioner Greg Chilcott and Commissioner Jeff Burrows.

STAFF PRESENT:

Chris Taggart, minutes

2. Pledge of Allegiance

3. Public comment

None.

4. Fire Season Update with E Hoover

Present:

Erik Hoover, OEM

Lt. Zae Hudson

Brad Mohn, Hamilton Fire Chief

Mark Wilson, BRNF

Steve Fullerton, KLYQ

5. Presentation on Ravalli County homelessness and possible solutions from Homeless Coalition

Present:

Jim Olsen

Jaimie Ogden, SAFE

Jim Morton, Human Resource Council

6. CANCELLED Presentation to BCC & set date of public hearings on: 10 app requests to Annex properties into Hamilton RFD

Attachment - Map

7. Discussion with possible decision: Letter of Support for BR Valley Community College (D Stark)

Attachment - Draft Letter

Present:

Dixie Stark
Don Gardner
Victoria Clark
Janet Woodburn
Sue Oly
John Grant
Eric Gren

Tom Korst
Lea Guthrie
John Davenport
Sue Smith
Ran Pigman
Gary Carlson

Public comment:

Don Gardner
Ran Pigman
Janet Woodburn
Tom Korst
Don Gardner
John Davenport

Commissioner Chilcott moved to approve the Letter of Support for the Bitterroot Valley Community College as requested. Seconded by Commissioner Burrows. Public comment on motion: none. Discussion: none. All voted "aye" (3-0).

8. Discussion with possible decision on purchase of cell phone booster for Courthouse

Present:

Erik Hoover
Sheriff Steve Holton
Lt. Jake Auch

BCC consensus: Erik to look into further and bring options back to BCC for review and consideration.

9. Public comment on items not otherwise on the agenda

None.

10. Adjournment

Commissioner Chilcott moved to adjourn the meeting. Seconded by Commissioner Burrows. All voted "aye" (3-0).

Chris Taggart, Administrative Assistant

**SPECIAL AND REGULAR MEETINGS
OF THE
RAVALLI COUNTY BOARD OF COUNTY COMMISSIONERS**

REGULAR MEETING 9:00 A.M.

Monday August 31, 2020

**Commissioners' Meeting Room
County Administration Building,
215 S. 4th St, Hamilton, MT 59840.**

**Commissioner Jeff Burrows
Commissioner Greg Chilcott
Commissioner Chris Hoffman**

COMMENTS FROM THE PUBLIC

Members of the audience will be provided an opportunity to address the Board concerning each item on the agenda, and will be afforded the opportunity to comment on items not on the agenda at the end of the meeting or as solicited by the Chairperson. (See protocol for addressing the Board or submitting written comments below.) If you have a petition or other information pertaining to your subject, please present it to the clerk. Please sign the sign-in sheet to document your attendance. Meetings of the Board of County Commissioners' are open to the public except when closed under §2-3-203, MCA. Minutes of public meetings will be made available for inspection by the public.

AMERICANS WITH DISABILITIES ACT

Persons with disabilities who plan to attend this meeting and who may need auxiliary aids or services are requested to contact the Commissioners' Office (at 406-375-6500, ☎) at least 48 hours in advance so that appropriate arrangements can be made. (28 CFR 34.102.104 ADA TITLE II)

NON-DISCRIMINATION POLICY

The Board does not discriminate on the basis of race, color, sex, culture, social origin or condition, or political or religious ideas. Statements, gestures and behaviors that threaten the health, welfare or safety of others are prohibited. Violators of this policy may be removed from the meeting

PLEASE TURN OFF CELL PHONES AND PAGERS WHILE MEETING IN PROGRESS.

PLEASE NOTE: A recording is made of Board meetings. When addressing the Board, please speak into the microphone. State your name and address (spell your name if the spelling is unusual). If you have a petition or other information pertaining to your subject, please present it to the clerk.

To allow all an equal opportunity to participate and to preserve decorum, please:

1. Address the chairperson, not the members of the audience or others.

2. Limit your comments to the allotted time.
3. Confine your comments to the item on the agenda unless the Board is taking comment on items not on the agenda.

The purpose of allowing public comment is to afford all interested persons the opportunity to participate. Comments can be verbal or written. Verbal and written comments carry equal weight. Respect the time of others: please do not simply read a written comment. Instead, present written comments to the clerk. The Board will allow all those who wish to address the Board an equal time and thus may not be able to respond to questions. In order that all can hear and participate, members of the audience are asked to refrain from commenting out of turn or attempting to engage those addressing the Board or Board members unless recognized by the Board.

9:00 A.M. REGULAR BOARD OF COMMISSIONERS MEETING

PRELIMINARY BUSINESS

1. **Roll Call**
2. **Pledge of Allegiance**
3. **Public comment**
4. **Fire Season Update with E Hoover**
5. **Presentation on Ravalli County homelessness and possible solutions from Homeless Coalition**
6. **CANCELLED Presentation to BCC & set date of public hearings on : 10 app requests to Annex properties into Hamilton RFD**

Attachment - Map

- A) King #210;
- B) Perry #211;
- C) Brown #212;
- D) Hansen #213;

- E) Hansen #214;
 - F) Bruno #215;
 - G) Renick #216;
 - H) Klucewich Swartz #217;
 - I) Hansen #218
 - J) Hansen #219)
- 7. Discussion with possible decision: Letter of Support for BR Valley Community College (D Stark)**
- Attachment - Draft Letter 
- 8. Discussion with possible decision on purchase of cell phone booster for Courthouse**
- 9. Public comment on items not otherwise on the agenda**
- 10. Adjournment**

Monday August 31, 2020

SIGN IN SHEET - COMMISSIONERS MEETING ROOM

****PLEASE PRINT YOUR NAME LEGIBLY****

THANK YOU!

DATE: 8/31/20

NAME

CONTACT INFO

Don Gardner

ph: 406-361-0275 ~~406-361-0275~~

Victoria Clark

vhelark@gmail.com

Dixie Stark

Jaeth Woodrum

406-~~541~~⁵⁴¹-0475

See R. Oly

719 510 8743

John Grant

406 224-0066

Eric Gren

~~406~~ (406) 369-4408

Tom Koisa

406-363-8992

Lea Guthrie

406-360-7509

John Davenport

406-381-5466

Jamie Ogden

406-369-0426

See Smith

406-381-1270

RAN Pigma

363-~~3000~~

rec'd 8/31/20 J. Ogden

HOUSING INSECURITY in the BITTERROOT

Aug. 2020

Bitterroot Affordable Housing Coalition

The Bitterroot Affordable Housing Coalition formed in 2016 to address what we recognized as a growing problem of homelessness and housing affordability in Ravalli County, and an urgent need to increase homelessness prevention. The Coalition includes representation from Bitterroot Family Shelter, Bitterroot RC&D, District XI Human Resource Council, First Presbyterian Church, Ravalli Head Start, Ravalli Services, SAFE and Summit Independent Living, among other organizations and concerned individuals.

Locally ... Housing Affordability and Availability in Ravalli County

Housing Affordability. The generally accepted definition of affordability is for a household to pay no more than 30 percent of their gross annual income on housing. According to the US Department of Housing and Urban Development (HUD), families who pay more than 30 percent of their income for housing are considered cost-burdened and may have difficulty affording necessities such as food, clothing, transportation and medical care. Households who pay more than 50 percent of their income for housing are considered severely cost-burdened. ***In Ravalli County, roughly 50% of renters and more than 30% of homeowners are cost-burdened.***

Housing Availability. The availability of rental housing in Ravalli County has been very low for some time, and especially low for affordable housing. Recent stress from an influx of new renters – due to the expansion of Montana Studios projects, COVID19-driven “in” migration, and growth in vacation rentals - have driven availability close to zero. Low availability has led to an increase in households using recreational vehicles as permanent housing. RV Parks in the area report zero availability for long-term site leases. ***Ravalli County has very little availability of rental housing and Missoula County has dropped to an estimated 1% availability.***

Emergency Shelter. Shelter beds in Ravalli County are currently full. Bitterroot Family Shelter, Salvation Army and SAFE all use hotel vouchers for emergency situations. While there is currently funding for emergency vouchers, there are very few hotel rooms available. The lack of emergency shelter, in the summer, leads to a marked increase in the number of households camping for housing. There are approximately 150 full or partial hook-up RV sites in Bitterroot RV parks, with very little availability for short or long-term rentals. The Bitterroot National Forest reports an increase in long-term occupancy (exceeding stay limits) over the past four summers. When the weather turns in the autumn, those households have nowhere to go. ***Ravalli County’s shelter capacity is full. Alternative shelter options, such as hotels and campgrounds, have very limited availability.***

In Ravalli County, in order to afford a studio apartment at Fair Market Rent (\$604), a person would need a full-time wage of \$11.63/hour.

Ravalli County one-bedroom (Fair Market) - \$684/month – hourly full-time wage needed \$12.81 (\$26,640 AMI)

Ravalli County two-bedroom (Fair Market) - \$878/month – hourly full-time wage needed \$16.87 (\$35,000 AMI)

In Ravalli County, a minimum wage full-time worker (\$8.65/hr) can afford a rent of \$450/month.

In Ravalli County, the estimated mean renter’s wage is \$10.33. This renter can afford a rent of \$537/month.

In Ravalli County, monthly Social Security benefits are \$783 per month. This renter can afford \$235/month in rent.

Per the Human Resource Council’s 2019 Community Needs Assessment:

Ravalli County Population – 42,563

Median Household Income - \$40,546

Occupied Housing Units – 12,106 owner-occupied, 4,646 renter-occupied

Homeowners -

17.5% moderately-burdened owners, 13.3 % severely-burdened owners – 30.8% total cost-burdened owners

Renters –

23.6% moderately-burdened renters, 25.7% severely-burdened renters – 49.3% total cost-burdened renters

Unemployment

July 2020	MT 6.4%	Ravalli County	5.7% (1,148 people of 20,278 total in the labor force)
April 2020	11.9%		
January 2020	3.5%		
July 2020	3.1%		

Ravalli County Point in Time Count

In January, the BAHC and Bitterroot Continuum of Care participated in the annual Point-in-Time Homeless Count – which measures homelessness on a single night. In Ravalli County, 50 homeless households completed the survey this past January – representing 100 homeless people.

Of those completing the most recent PIT:

- 24 households were multi-person households, 17 with children in the home, and 26 were single-person households
- 66 homeless individuals were adults, 34 were children
- 5 were veterans
- 44 of 50 households had an income
- For more than half (29), this was the first time they experienced homelessness
- For well over half (31), homelessness had persisted for more than 6 months. For 17 households, more than 1 year.
- Most of Ravalli County's homeless are long-time residents: 14 households have been in the community more than 20 years, 21 households have been in the county between 5 and 20 years.

Ravalli County Service Data

As the Coalition is currently updating data for our needs assessment, a few figures highlight local needs ...

- In Ravalli County, the Human Resource Council served 27 households with housing assistance in 2018-2019, and 22 in 2019-2020
- Ravalli Head Start served 35 families experiencing homeless in the 2018-2019 school year (11 of whom found housing). In the 2019-2020 school year, RHC served 38 families experiencing homelessness (8 of whom found housing).
- SAFE housed 49 adults and 32 children in emergency shelter from July 1, 2019 to June 30, 2020 – as well as 13 adults and 26 children in Transitional Housing, and 30 adults and 48 children in Rapid Rehousing housing assistance. During the same time period, SAFE spent \$3,836 on hotel stays for emergency shelter, due to lack of shelter beds.
- Ravalli County has 438 subsidized housing units (including senior and disabled subsidized housing) in 19 housing complexes from Darby to Stevensville. About 244 units are income-restricted, and the remainder are subsidized for low-income seniors and disabled people. There is near 0 availability for rentable units.
- Section 8 housing assistance is available for low-income individuals, but the current wait list is approximately 36 months (3 years) long.

Nearby... Missoula City/County

Just last week, Missoula property managers announced a 1% vacancy rate for rentals in Missoula, just as students are coming back to school. While vacancy rates aren't typically high in Missoula, nearing 0 is a new low that signals our regional housing crisis is real. KPAX reported that property managers were advising people not to apply for apartments, as each application comes with a fee and that money would likely be wasted.

<https://www.kpax.com/news/missoula-county/almost-0-apartments-available-in-missoula>

Last summer, the City of Missoula adopted a Housing Plan detailing local and regional needs. The plan, entitled A Place to Call Home, details regional trends and barriers to affordable housing.

<https://www.ci.missoula.mt.us/2128/Citywide-Housing-Policy>

In Montana...

National Low-Income Housing Coalition 2020 Report

Across Montana, there is a shortage of rental homes affordable and available to extremely low income households (ELI), whose incomes are at or below the poverty guideline or 30% of their area median income (AMI). Many of these households are severely cost burdened, spending more than half of their income on housing. Severely cost burdened poor households are more likely than other renters to sacrifice other necessities like healthy food and healthcare to pay the rent, and to experience unstable housing situations like evictions.

In Montana, an estimated 23% of renter households are extremely low income (earning \$25,100 annually for a family of four). There is an estimated shortage of affordable rental housing for extremely low income families of 19,589 units. 68% of extremely low income renters are severely cost-burdened. A household would need to earn \$35,112 annually to afford a two-bedroom rental home at HUD's Fair Market Rent. (National Low Income Housing Coalition, 2020). A 2018 NLIHC study found that, in Montana, affordable and available rental units for extremely low income households were 7 times fewer than rental units for households at 50% of mean income or higher).

Nationally...

In July, an estimated 27% of Americans missed rent or mortgage payments, according to a survey by the U.S. Census Bureau. One-third of renters said they had "little to no confidence" they could make their August payment, all at a time when federal and state eviction bans are lifting.

Contact Information:

BITTERROOT AFFORDABLE HOUSING COALITION - AUGUST 31, 2020

PRESENTED BY

JAMES R. OLSEN

Too Much Rent • Zero Rentals

Housing Security and Homelessness in the Ravalli County

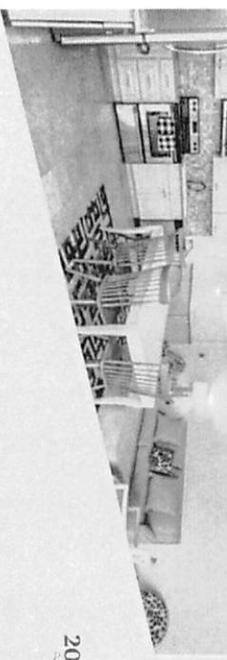
Bitterroot Affordable Housing Coalition
Membership Criteria: *Show up*

MEMBERS

- Bitterroot Family Shelter •
 - Bitterroot RC&D •
 - District IX Human Resources Council •
 - First Presbyterian Church •
 - Ravalli Head Start •
 - Ravalli Services •
 - SAFE •
 - Summit Independent Living •
- ... other organizations and concerned individuals ...
-

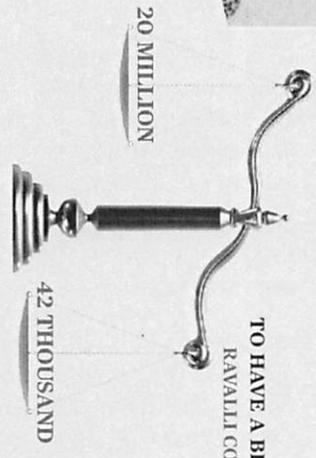
800 sq ft condo

Redondo Beach, Los Angeles



IT ONLY TAKES A FEW THERE
LOS ANGELES BASIN

TO HAVE A BIG IMPACT HERE
RAVALLI COUNTY



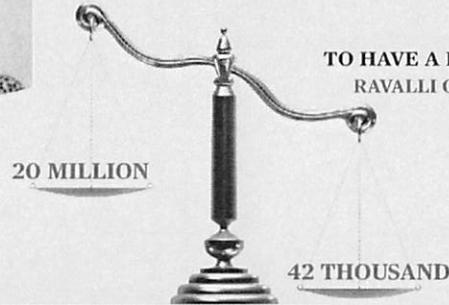
COVID FLIGHT
Brings Real Estate Boom to
Ravalli County

800 sq ft condo

Redondo Beach, Los Angeles



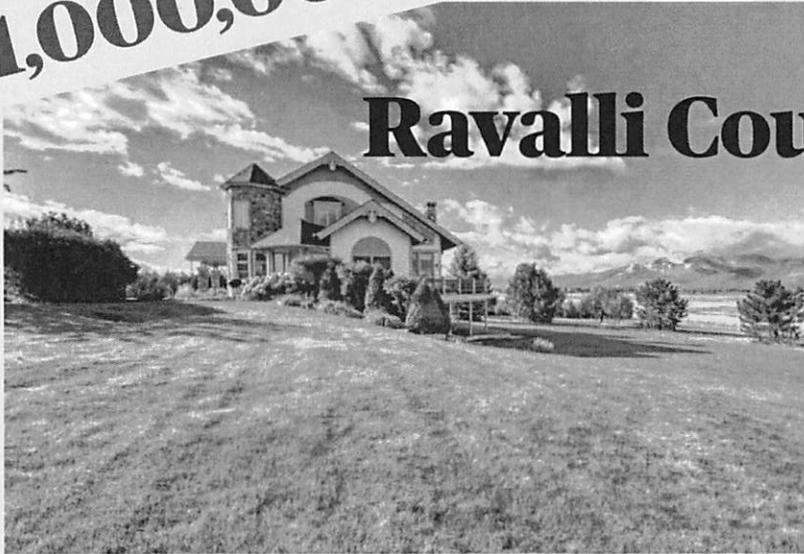
IT ONLY TAKES A FEW THERE
LOS ANGELES BASIN



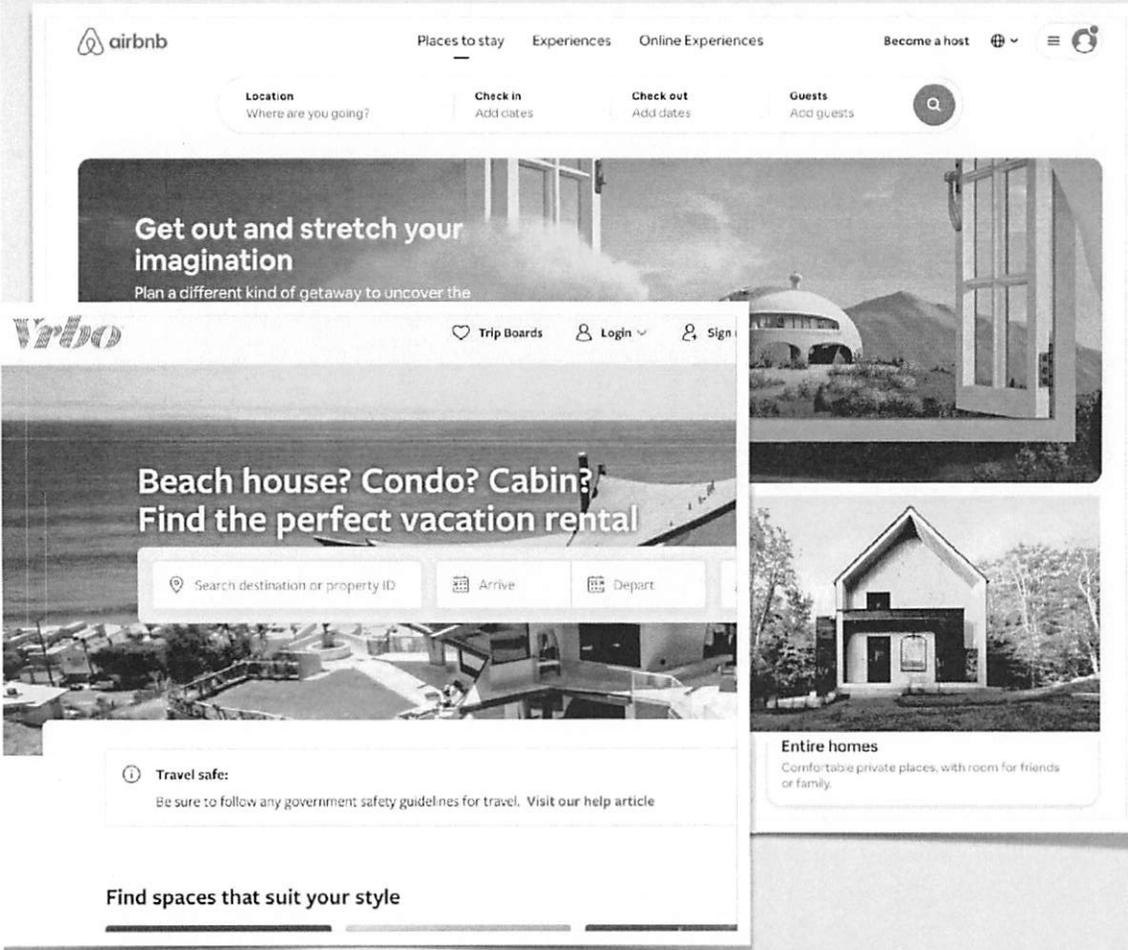
TO HAVE A BIG IMPACT HERE
RAVALLI COUNTY

**Match Up
\$1,000,000**

Ravalli County

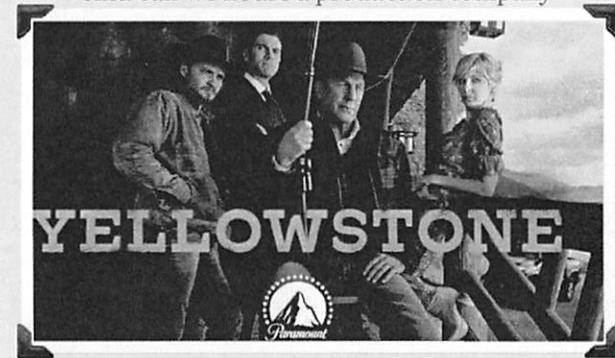


COVID FLIGHT Brings Real Estate Boom to Ravalli County

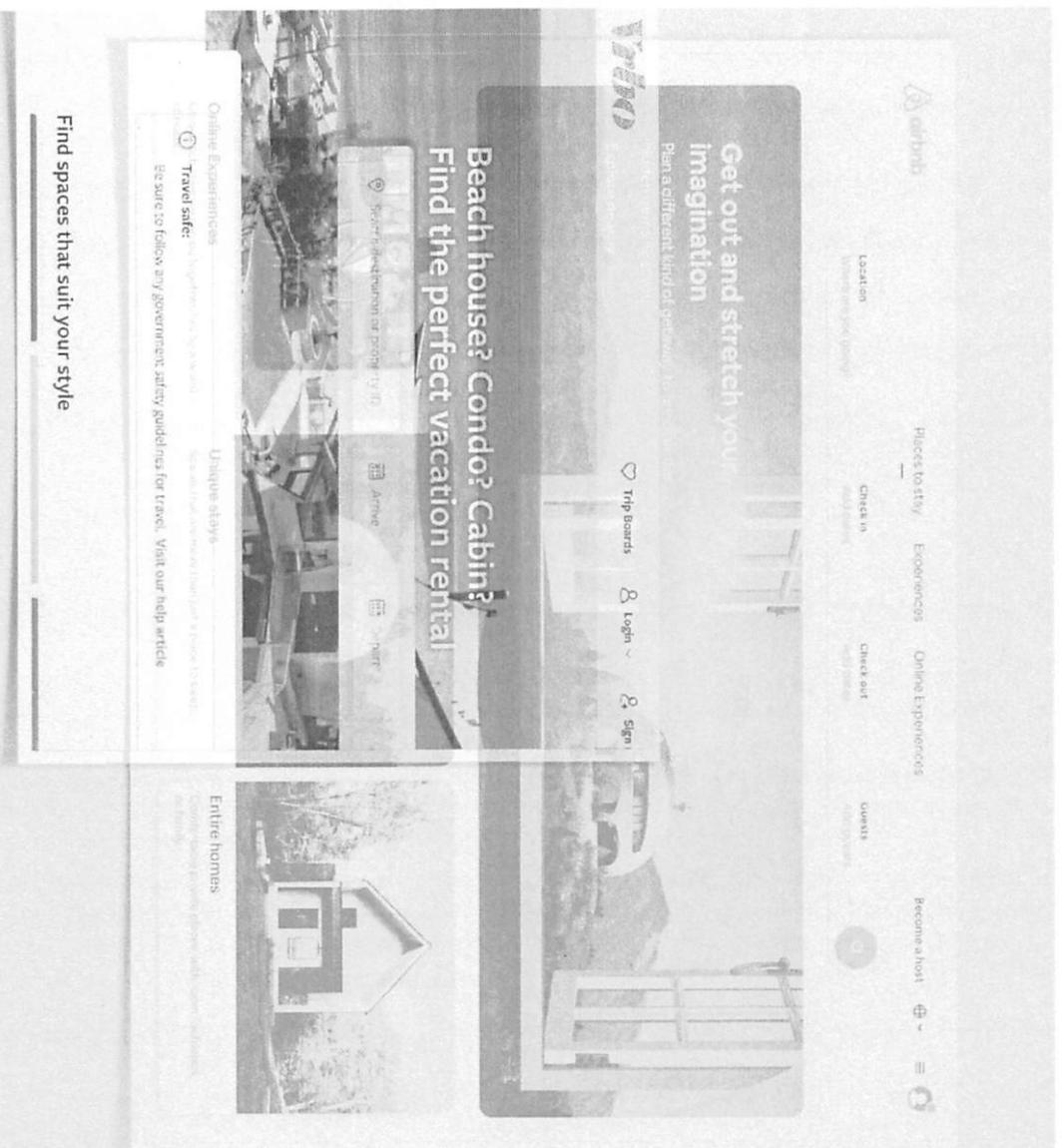


Rentals Disappear

And can we house a production company

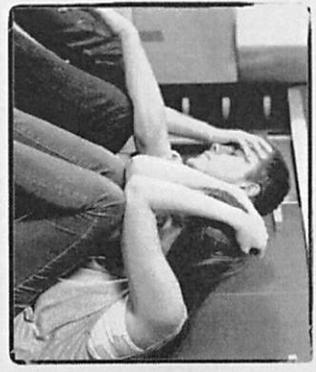
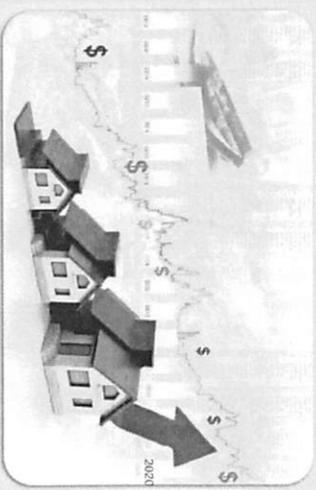


- Air Bnb, vacation rentals
- Single family zoning in Hamilton

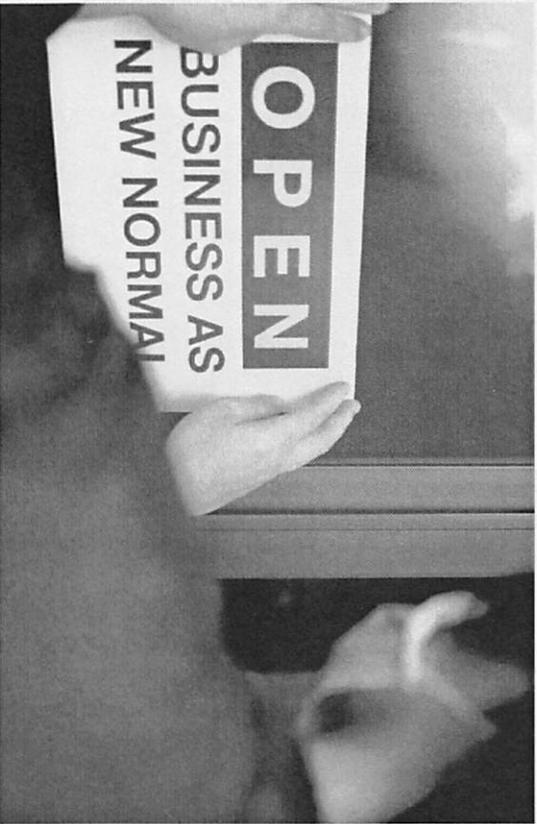


Rentals Disappear

COVID FLIGHT



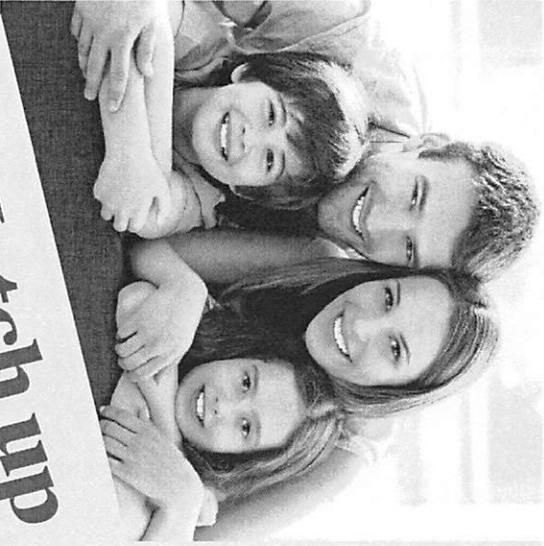
- Rental Properties -> For-Sale Properties
- Air Bnb, vacation rentals
- Single family zoning in Hamilton



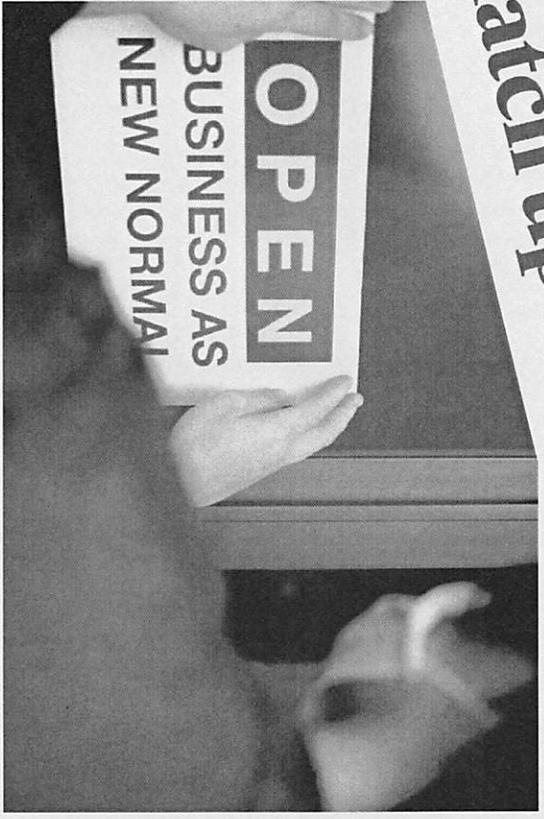
JOBS IN RAVALLI COUNTY

JOBS

- 20,000 Jobs
 - 1,300 Unemployed (6.4%)
-
- 3% unemployed - Best you can do
 - 700 back to work in the best of times
 - About 200 jobs listed now
 - From service to professional



Match up

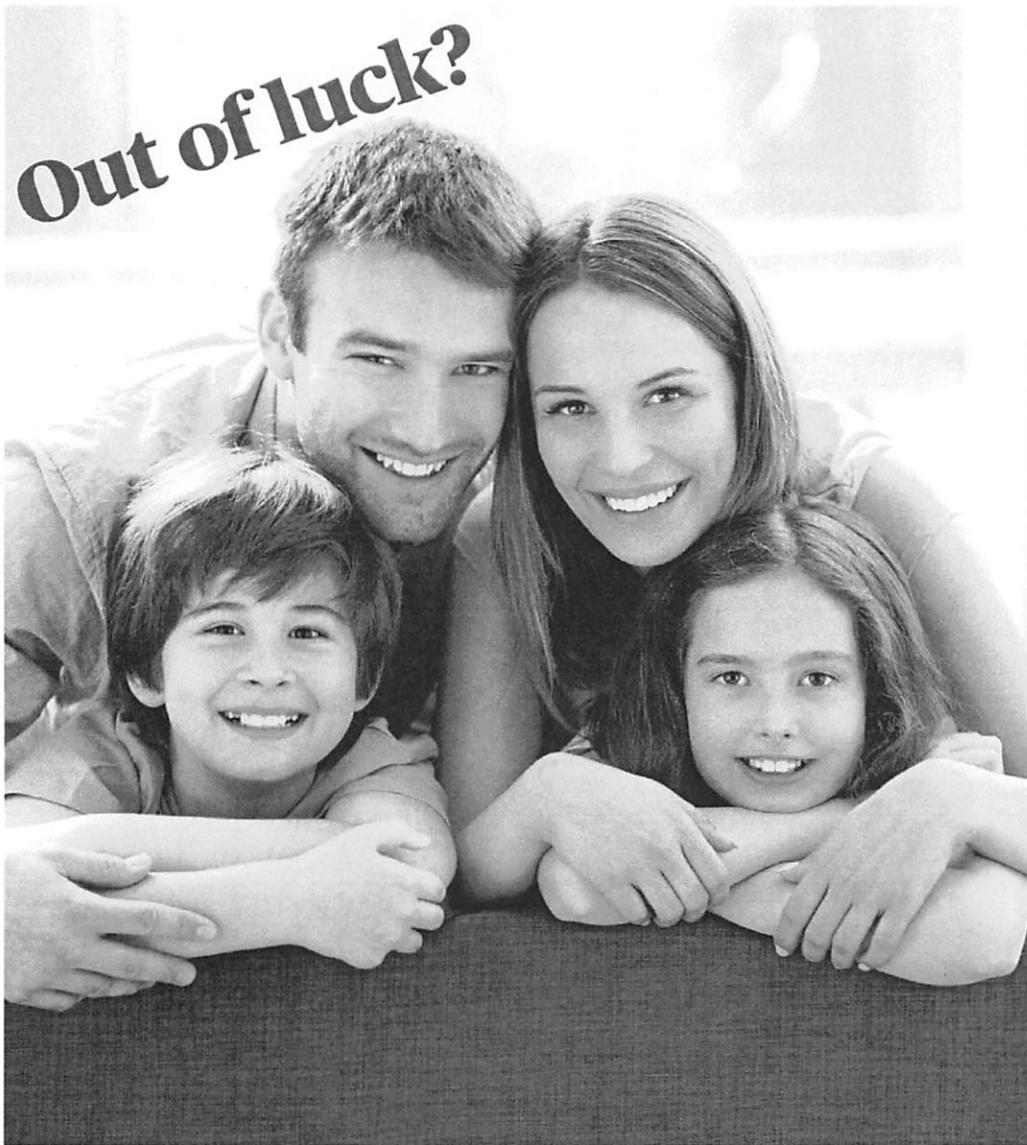


JOBS

Problem for Businesses

- Lack of affordable housing a problem for businesses before COVID
- Worse Now

Out of luck?



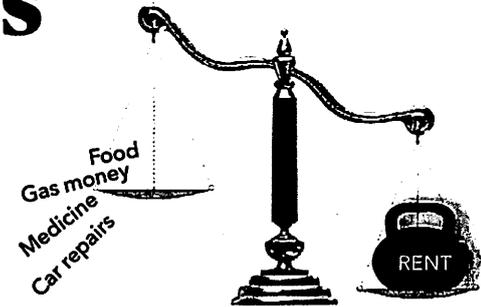
RENTALS TODAY - MAYBE

RENTALS NEAR ZERO

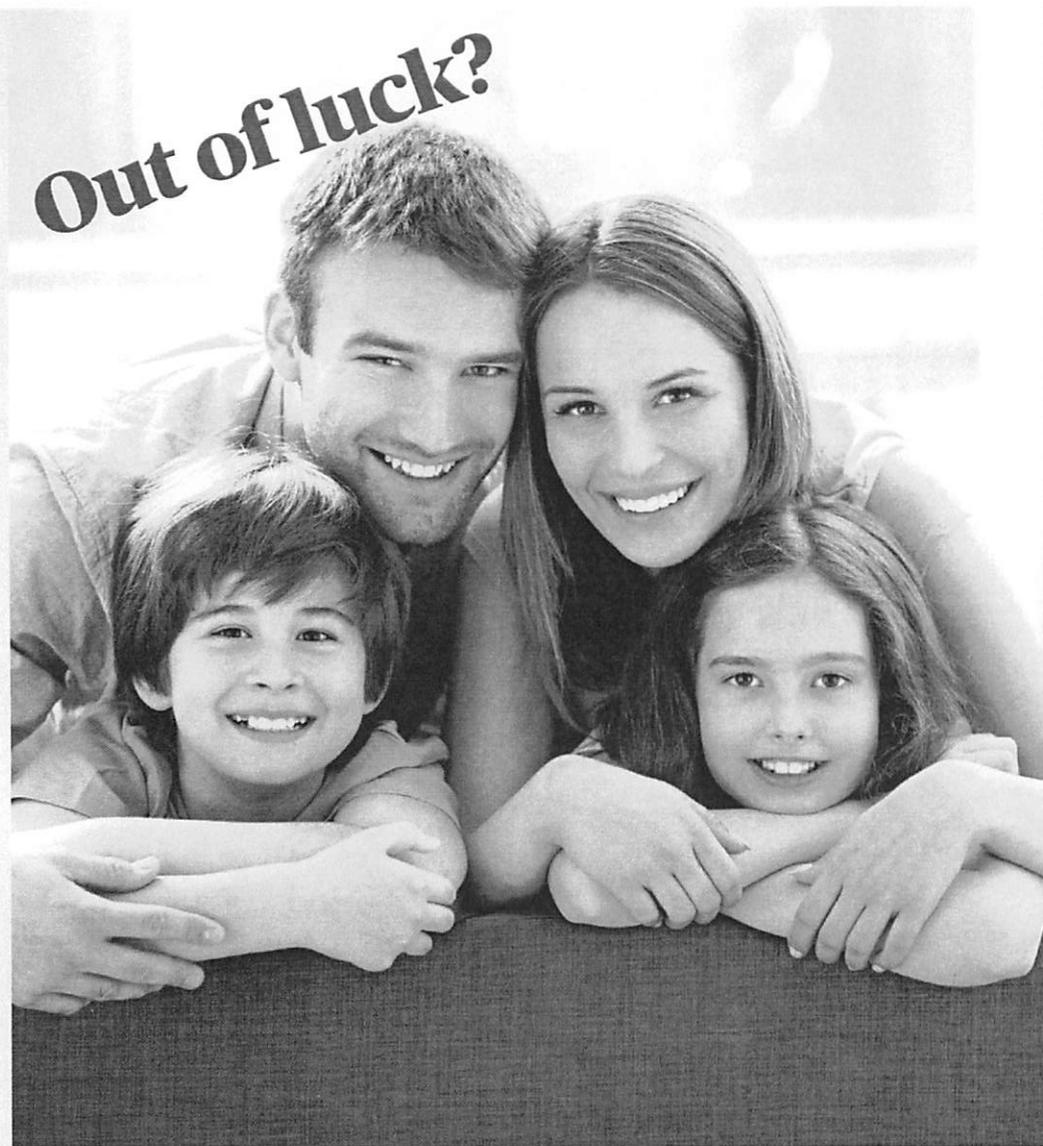
- Cardinal Properties
No residential rentals available listed on their website
 - Greener Montana Properties
No residential rentals available listed on their website
-
- On trulia.com and zillow.com - may not be available - have to provide phone #
\$1,200/mo: 1 br
\$1,200/mo: 1 br
\$750/mo: 1 br
 - Craigslist (two of these are also on realtor.com)
\$500/mo: Studio apt
\$600/mo: 2 br apt (listing 3 days old)
\$750/mo: 1 br apt
\$1,200/mo 2 br cottage
\$1,000mo: 2 br apt (7 months must be paid in advance)

Definitions HUD and Others

- Housing **Affordability**: 30% of gross annual income
 - **Cost Burdened**: > 30%
 - *The household tradeoffs begin: Rent, Food, Medicine, Car, Gas*
 - **Severely Cost Burdened**: > 50%
 - *Choose one or more you cannot pay for this month: Rent, Food, Medicine, Car payment, Gas, Repair*



Out of luck?



42,563 People

What Can They Afford?

AFFORDABILITY TODAY IN RAVALLI COUNTY

16,752 Homes



12,106 Owner Occupied
31% Cost Burdened – 13% severely

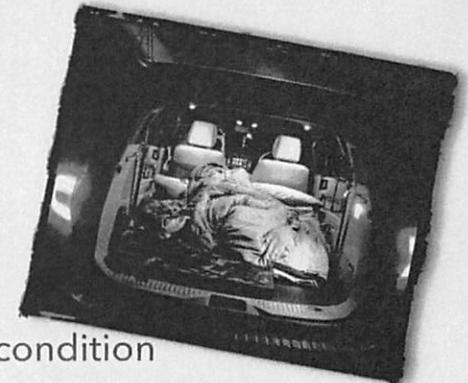
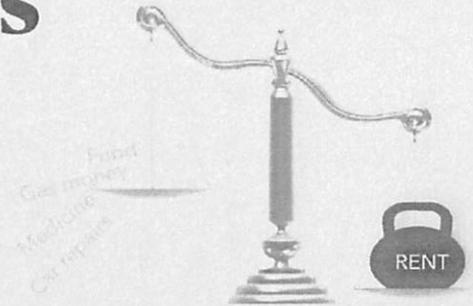
4,646 Rentals
49% Cost Burdened – 26% severely

< 10 Available for Rent

- Minimum Wage full time worker: \$450 /mo - NONE AVAILABLE
- \$13 per hour full time: \$750 /mo - TWO AVAILABLE (1 br)
- \$22 per hour full time: \$1200 /mo - THREE AVAILABLE
- Two wage earners, full time, \$11 per hour

Definitions HUD and Others

- Housing **Affordability**: 30% of gross annual income
 - **Cost Burdened**: > 30%
 - *The household tradeoffs begin: Rent, Food, Medicine, Car, Gas*
 - **Severely Cost Burdened**: > 50%
 - *Choose one or more you cannot pay for this month: Rent, Food, Medicine, Car payment, Gas, Repairs*
- **Homeless**:
 - No fixed nighttime residence
 - Living in a place intended for human habitation
 - Living in an emergency shelter
 - About to loss primary nighttime residence and have no place to go
 - Attempting, or are fleeing domestic violence, stalking, or other live-threatening condition



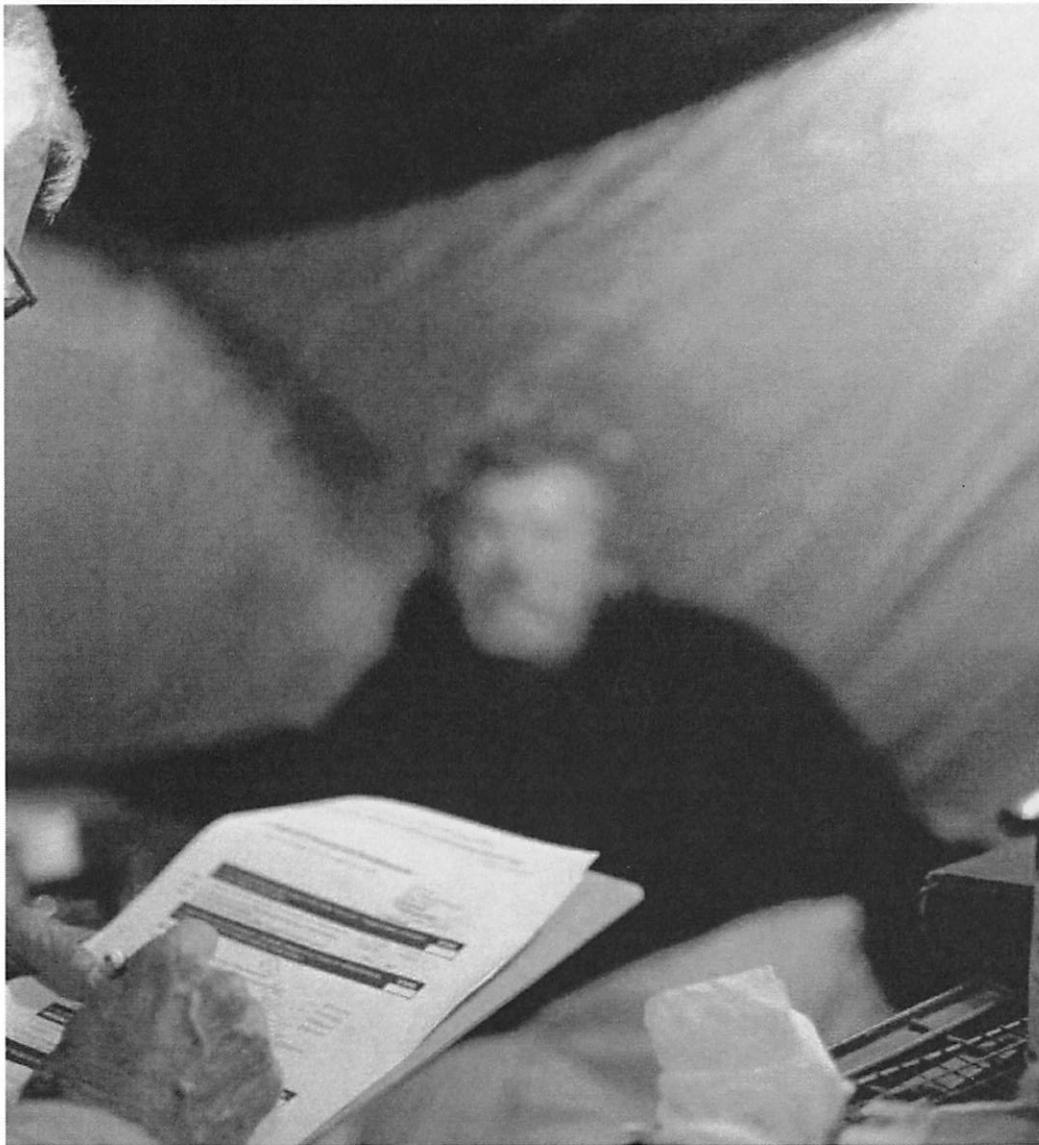


COUNTING THE HOMELESS

Counting How Many?



- Point in Time Survey (PIT)
- One Day in January
- Data for HUD Funding
- Notorious for Undercounting
 - Most literature: add 75% or more in urban areas
 - When they have a "total count" though the year
- Mostly voluntary reporting by homeless population



COUNTING THE HOMELESS

How Many?

Estimate: 175 to 300



- Point in Time - 100 people - who
 - 66 Adults • 34 Children
 - 29 Were first time homeless
 - Half over 6 months, 17 over a year
- HOUSEHOLDS - 48 - family groups
 - 24 Single • 24 Families, 17 w/Children
- HOUSEHOLDS - 48 - how long
 - 35 in the County over 5 years
 - 14 of those, over 20 years



PROVIDERS

Shelters and Services

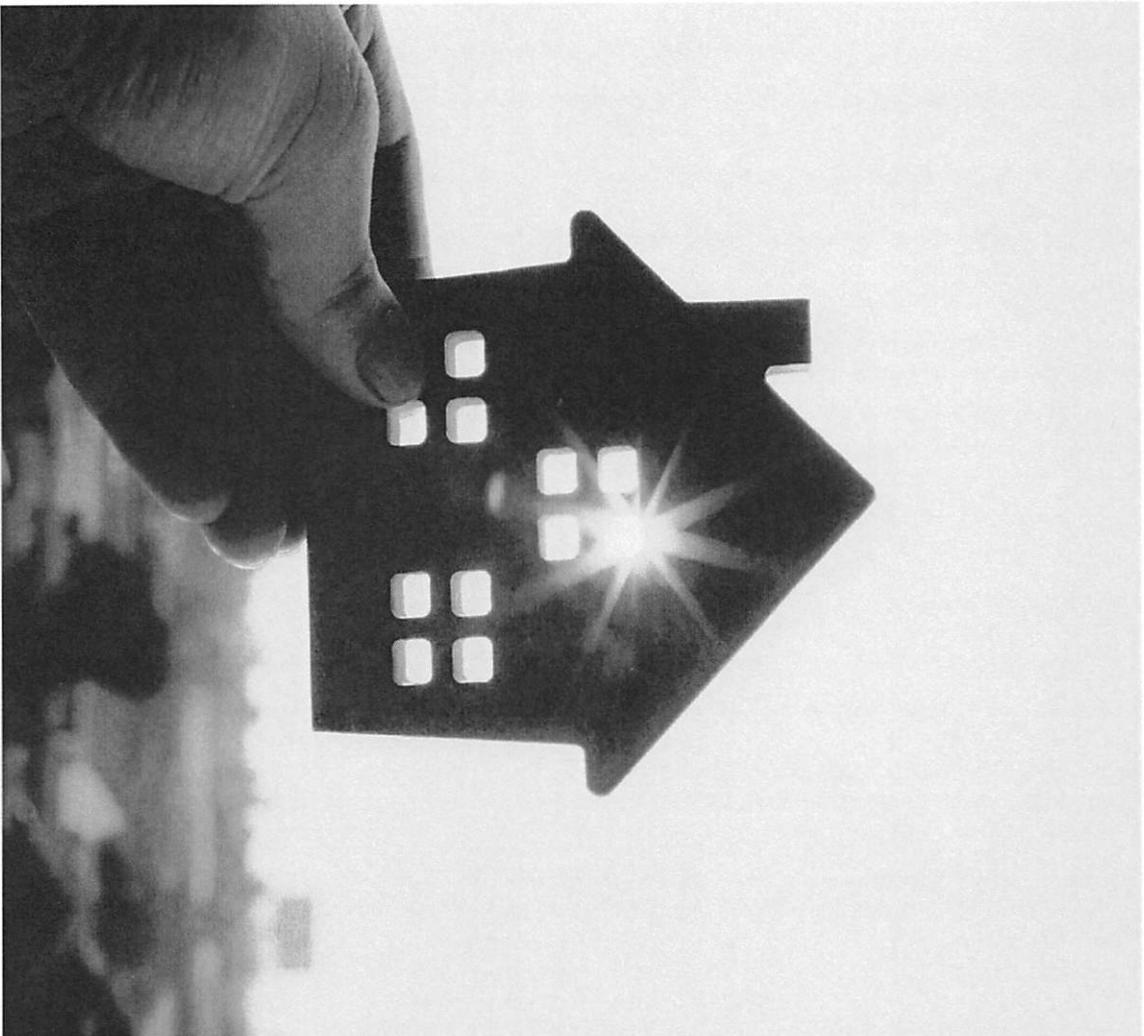
KEEPING FAMILIES HOUSED

HOUSED

- 438 subsidized homes in 19 complexes
 - Long waiting list
- Section 8 Vouchers (HUD)
 - Long waiting list

TRANSITIONALLY HOUSED

- Human Resource Council: 22 families
- Head Start: 38 homeless/8 found housing
- SAFE:
 - 49 adults/32 children Shelter
 - 13 adults/26 children Transitional Housing
 - Plus hotel rooms
- Salvation Army



PROVIDERS

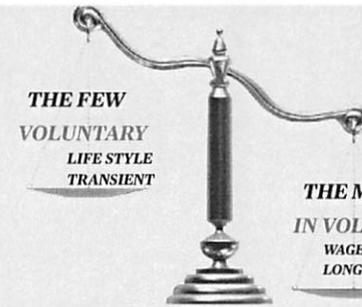
Informal Providers

KEEPING FAMILIES HOUSED

CHURCHES

- Free Meals
- Housing support

INDIVIDUALS



THE FEW
VOLUNTARY
LIFE STYLE
TRANSIENT

THE MANY
IN VOLUNTARY
WAGER EARNERS • SOCIAL SECURITY • BROKE
LONG TERM RESIDENTS • RESIDENTS

THE REST OF THE STORY

Strategies for Living

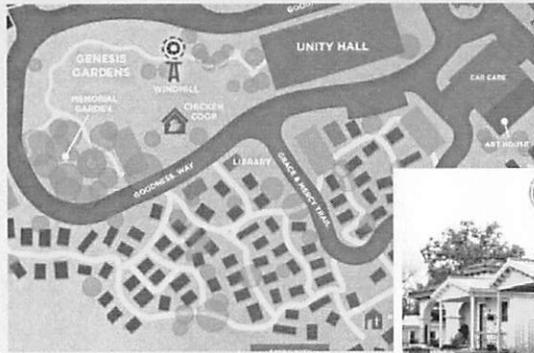
-
- Couch sharing
 - A camping trailer or RV
 - Permanent spot in RV camp
 - Forest Service Campgrounds • Or other site
 - Private land
 - On the street
 - A Tent
 - A Car
 - Office rent is cheaper
 - Homespun shelter in the woods or under a bridge

BITTERROOT AFFORDABLE HOUSING COALITION - AUGUST 31, 2020

HOUSING IDEAS

FUND • CHANGE THE RULES • BUILD

- Fund current service providers to increase existing apartment purchases
 - City of Hamilton and Other Towns
 - Change the Zoning to allow rental of “mother in law” units
 - BUILD
 - FEMA trailers
 - Low-income housing - standard or manufactured
 - Affordable Community project
-

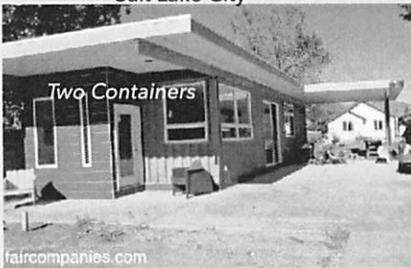


Austin



Community First! Village
A PLACE TO CALL HOME

Salt Lake City



3D Printed Houses



Solutions Around the World Drive Costs Down

- Privacy and the Commons
 - More population per sq ft
 - Small living spaces with large common areas
- Less costly building technologies
 - Cargo Container
 - 3D Printing

Low Cost Housing Principles

- Fewer Square Feet per person
 - Shared Household economics
 - Privacy and Community Commons
- Lower building costs
 - Low cost technologies
 - Structure from Cargo Containers
 - Structure and more from 3D Printing
- No/Low Cost Quality
 - Design small spaces to seem big
 - Passive energy efficient
 - Let the Sunlight in
 - Quiet design
- Simplify building
 - Standardization of detail
 - Keep framing simple

AN EXAMPLE

The Hacienda

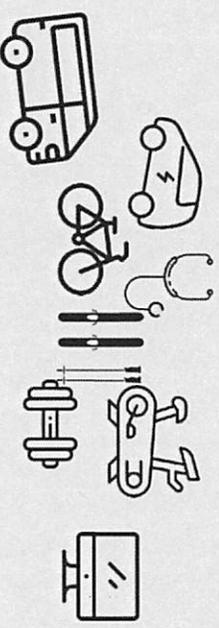
Affordable Housing

Live Well, Live Cheap

- Cost effective building technologies
- Shared household economics
- Balance of privacy and shared spaces
- Low square feet per person in an elegant space
- Shared energy, water, and waste infrastructures
- Shared transportation, recreation, security, and IT
- Energy efficiency

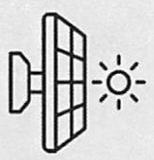
Social Goals

* Housing insecurity situation  affordable living.



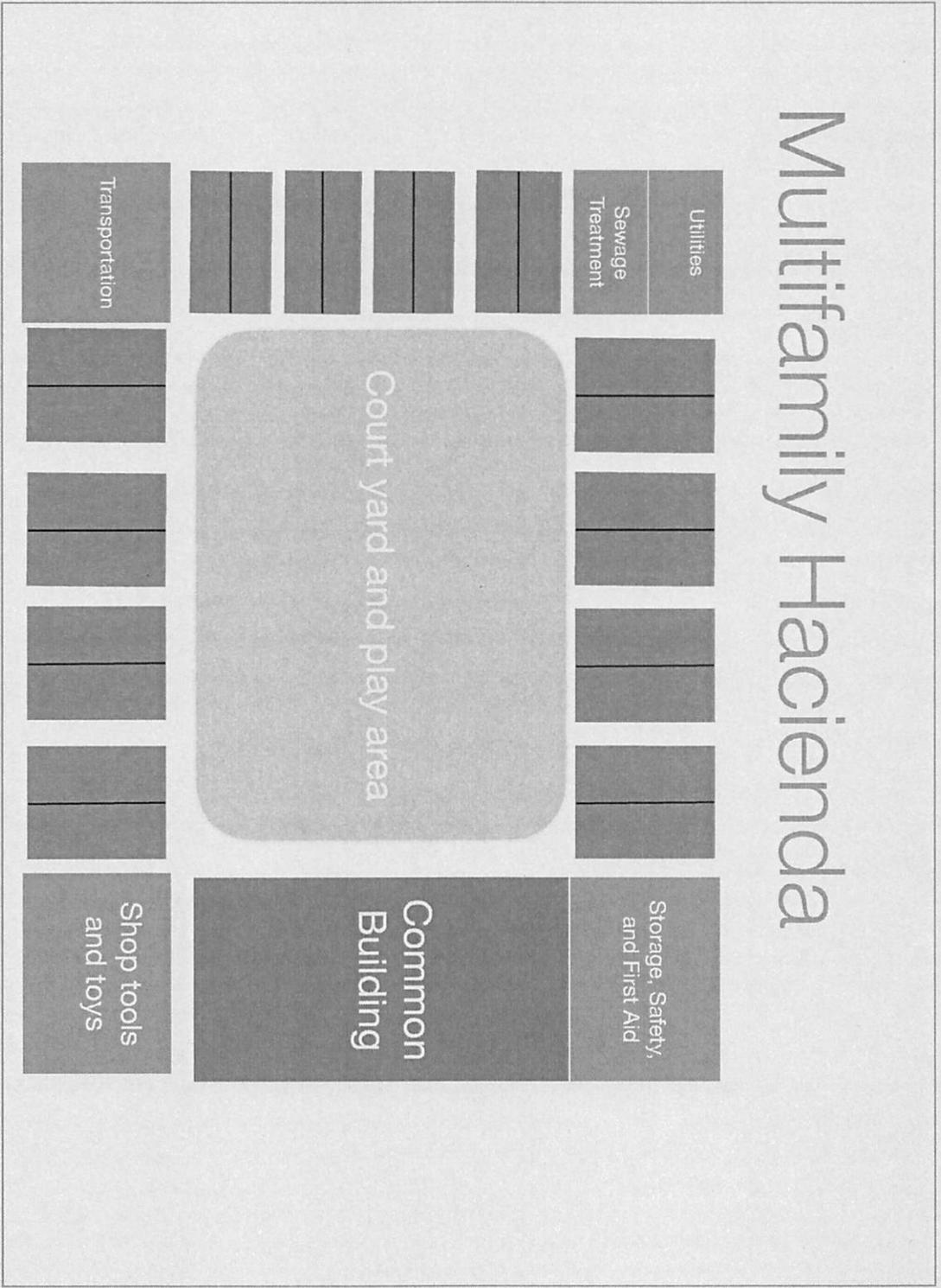
A holistic solution.

* A path to financially self sustaining without subsidies.



Alternative energy, lower carbon footprint

Multifamily Hacienda



Multifamily

Shared Storage
Safety
Fire Suppression
First Aid

Utilities
Sewage Treatment

Storage, Safety,
and First Aid

Court yard and play area

Common Building

Community

- Kitchen
- Function Room

Foldable walls to for reconfigurable spaces

- ... Dining
- ... Functions
- ... Meetings
- ... Classes
- ... Religious Service

Computer Room

- Computers
- Printers
- Copier

Library

Guest Suites

Shared Tools
Recreation Equipment

Shop tools
and toys

Transportation

Multifamily Hacienda



Making Small Space Elegant

- * Higher ceilings
- * Light Pipes
- * Quiet Design
 - * (interior insulation, double stud walls)
- * Passive Solar
 - * South windows, eve placement
- * Super insulated
- * Passive Air Circulation & Attic Fan
- * HEPA Filter
- * Space savers
 - * Murphy Beds, fold out tables, pull out desks, kitchen on a wall, storage overhead



Could You Live Here?

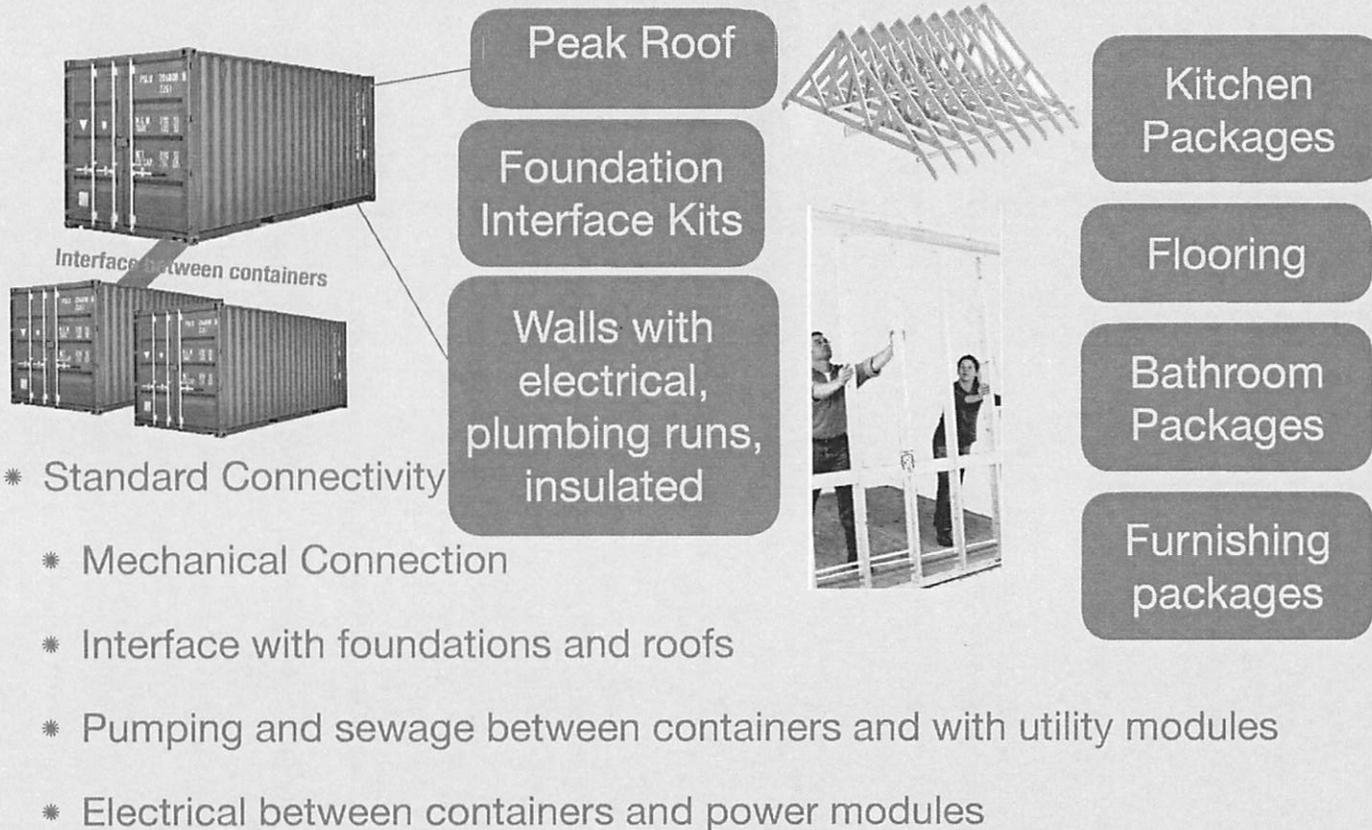


400 Square Feet



Going Beyond the Current Market

Modular and Standardized

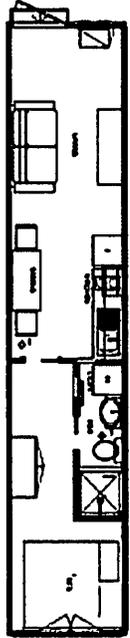


Kitchen and Laundry on a Wall

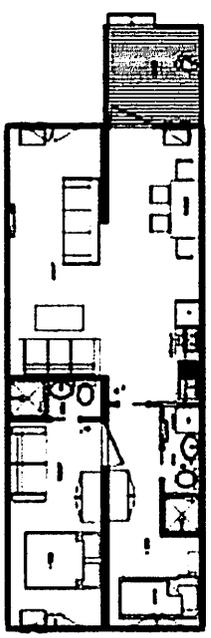


Shipping Container Layouts

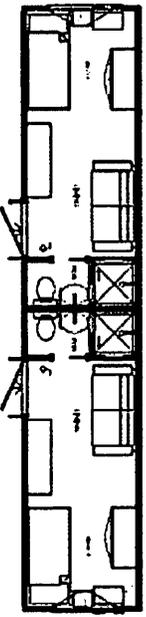
1 Bedroom Unit



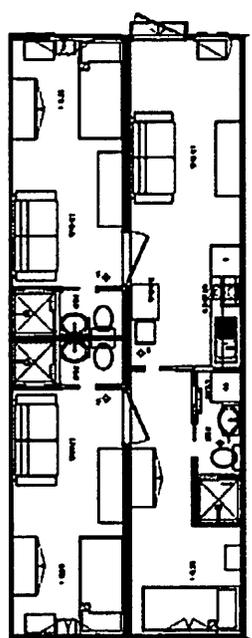
2 Bedroom Unit with Open Plan Living



2 Bedroom Unit



3 Bedroom Unit



Land and Cost

Hacienda

- 32 living units
 - 1 bedroom - 200 square feet - for 1 person
 - 1 bedroom - 400 square feet - for a couple
 - 2 bedroom - 600 square feet - for small family
 - 2+ bedroom - 800 square feet - for family
 - 3 bedroom - 1000 square feet - for large family
 - Two - Three flexible configuration guest houses
 - Common building - flexible configuration - kitchen - 7000 square feet

Hacienda

- Furnished
- Passive energy design
- Shared vehicles and recreation equipment
- Shared common area -
 - First class kitchen for family get togethers
 - Flexible hall - eating, entertaining, praying, classes - mental and physical
 - Entertainment Equipment
 - Computers/printers/copiers
- Two-three guest rooms

Hacienda Operations

- Property Tax
- Insurance
- Internet
- Utilities
- Hacienda Organizer (the following will be done by members or about \$300 per unit added)
 - Light Maintenance
 - Common Areas
 - Administration
 - Landscape care
 - Security

Monthly Cost - JUST HOUSING

Rough Estimate

Includes \$80K land. 32 Units. \$3.4 million

With common area

	Size	Mo. Cost
1 person 1 bedroom	200 sq ft	\$2220
A couple 1 bedroom	400 sq ft	\$4441
Small family 2 bedrooms	600 sq ft	\$6661
Family 2+ bedrooms	800 sq ft	\$8882
Large Family 3 bedrooms	1,000 sq ft	\$1,102

Rough Estimate

Monthly Cost - ALL

32 Units.

*Housing • Furnished • Shared Vehicles and Rec Equipment
• Operations, taxes, insurance, incl. Labor*

	Size	Mo. Cost
1 person 1 bedroom	200 sq ft	\$490
A couple 1 bedroom	400 sq ft	\$980
Small family 2 bedrooms	600 sq ft	\$1,471
Family 2+ bedrooms	800 sq ft	\$1,961
Large Family 3 bedrooms	1,000 sq ft	\$2,451

Hacienda Membership

- Must apply
- Background check - non-violent
- Residence/job requirement
 - Either have live here for a ___ or have a job in Ravalli County
 - Not required to in any government supported program or status
- Generally expect the applicant to be able to pay the fare with wages or other support, including government funded programs.
- Will probably have a community funded program for some of members who simply cannot come up with the money, needs extra support, etc.

BITTERROOT AFFORDABLE HOUSING COALITION · AUGUST 31, 2020 · JAMES R. OLSEN PRESENTER

Housing Security and Homelessness in the Ravalli County

Recommendations

- Include a response to housing security and homelessness strategic economic development plans.
 - **WHEN WINTER COMES**
COVID-19 may turn homelessness from a problem to a crisis in Ravalli County.
 - What ever happened to the CARES Act Money?
-

August 31, 2020

Casey Lozar, Chair
Montana Board of Regents
PO Box 203201
Helena, MT 59620-3201

Dear Chair Lozar,

The Ravalli County Board of Commissioners submits this letter enthusiastically supporting a positive recommendation from the Montana Board of Regents to the Montana Legislature for the organization of the Bitterroot Valley Community College District. The Ravalli County Commissioners affirm the will of local voters to organize the new community college district.

Ravalli County is the seventh most populous county in Montana. It is the only county with significant population that does not have a locally administered unit of the Montana University System. The six most populated counties all have units of the MUS, and a handful of less populous counties have units of the MUS, as well. The labor force of Ravalli County is 20,278 people in July of 2020 (imi.mt.gov) However, the Bitterroot Job Service was closed several years ago by the state, despite the location of Job Service offices in nine counties with less population than Ravalli County. The location of Ravalli County next to Missoula County does not negate the need for local services.

The Bitterroot Valley Community College District, comprised of the Ravalli County School Districts of Corvallis, Darby, Hamilton, Lone Rock, Stevensville, and Victor, will provide area residents with accessible, affordable, and responsive workforce training, transfer education, adult basic education, lifelong learning, and community development opportunities. The new community college district will have the authority, resources, and legitimacy required to effectively meet the varied programming needs and interests of the businesses, communities, and residents of Ravalli County.

The Ravalli County Commissioners look forward to working together with a robust, permanent, and locally controlled and committed Bitterroot Valley Community College to address local workforce and postsecondary education training. The Ravalli County Commissioners strongly advocate in favor of the organization of the Bitterroot Valley Community College District. We believe the new district is necessary as the County looks to maintain a sustainable economy within a changing workforce and population landscape.

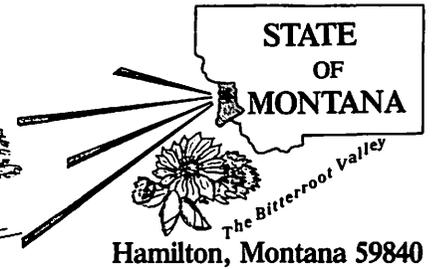
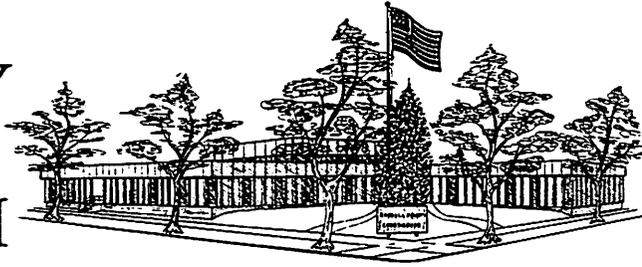
Sincerely,

Jeff Burrows, Ravalli County Commissioner

Greg Chilcott, Ravalli County Commissioner

Chris Hoffman, Ravalli County Commissioner

COUNTY OF RAVALLI



August 31, 2020

Casey Lozar, Chair
Montana Board of Regents
PO Box 203201
Helena, MT 59620-3201

Dear Chair Lozar,

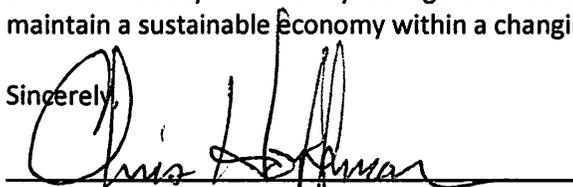
The Ravalli County Board of Commissioners submits this letter enthusiastically supporting a positive recommendation from the Montana Board of Regents to the Montana Legislature for the organization of the Bitterroot Valley Community College District. The Ravalli County Commissioners affirm the will of local voters to organize the new community college district.

Ravalli County is the seventh most populous county in Montana. It is the only county with significant population that does not have a locally administered unit of the Montana University System. The six most populated counties all have units of the MUS, and a handful of less populous counties have units of the MUS, as well. The labor force of Ravalli County is 20,278 people in July of 2020 (imi.mt.gov) However, the Bitterroot Job Service was closed several years ago by the state, despite the location of Job Service offices in nine counties with less population than Ravalli County. The location of Ravalli County next to Missoula County does not negate the need for local services.

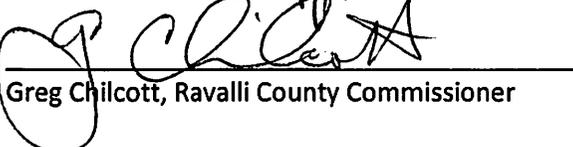
The Bitterroot Valley Community College District, comprised of the Ravalli County School Districts of Corvallis, Darby, Hamilton, Lone Rock, Stevensville, and Victor, will provide area residents with accessible, affordable, and responsive workforce training, transfer education, adult basic education, lifelong learning, and community development opportunities. The new community college district will have the authority, resources, and legitimacy required to effectively meet the varied programming needs and interests of the businesses, communities, and residents of Ravalli County.

The Ravalli County Commissioners look forward to working together with a robust, permanent, and locally controlled and committed Bitterroot Valley Community College to address local workforce and postsecondary education training. The Ravalli County Commissioners strongly advocate in favor of the organization of the Bitterroot Valley Community College District. We believe the new district is necessary as the County looks to maintain a sustainable economy within a changing workforce and population landscape.

Sincerely,


Chris Hoffman, Ravalli County Commissioner Chairman


Jeff Burrows, Ravalli County Commissioner


Greg Chilcott, Ravalli County Commissioner

rec'd
8-31-20
D. Stank

Ravalli County's Economic Development Needs and Opportunities

An *Economic Needs Assessment* was completed for Ravalli County and its Economic Development Authority in 2002.ⁱ During the decade of the '90s Ravalli County was the fastest-growing county in Montana with population growth of over 40 percent. The 2002 Assessment identified the need for expanded workforce development and training in the fast-growing valley with its fast-changing economy.

At a more recent Bitterroot community forum Dr. Larry Swanson of the University of Montana's O'Connor Center for the Rocky Mountain West, who conducted the 2002 needs assessment, identified two main needs for area economic development.ⁱⁱ These are:

Workforce regeneration – a growing number of aging workers will be completely or partially retiring in coming years and they will need to be replaced by younger workers that are smaller in number. Younger workers will need to have pathways into these jobs and into other new and growing areas of the workforce. Targeted and less formalized training and education programming needs to be emphasized and further developed, creating pathways to areas of job growth in the county while also providing lifelong learning opportunities to a growing area population.

Business development – the valley has a long tradition of fairly high self-employment or proprietor employment. The county needs to build on this in encouraging new small business development with training and education in business planning, micro-finance, and small business operation. Bitterroot College working in combination with the county EDA can provide this. The county also needs to look at growing opportunities for creating part-time self-employment (proprietorships) for both older workers as they transition into retirement and young couples who need to accent their family income and expand areas of economic opportunity.

Like many areas of Montana and the larger region, the population of Ravalli County is aging and growth is increasingly focused

among older adults. Workforce education and training will need to account for this by providing education opportunities for older workers while they work. This requires a flexible, less formalized approach to education programming design as well as local area access. Younger adults in their 30s and 40s will be asked to fill the increasing "holes" left in the work force as older workers increasingly leave the labor force. This also will require flexible and targeted approaches in workforce education and training.

Ravalli County's economy is steadily changing and restructuring. It isn't the economy of twenty years ago when there was a much heavier reliance on lumber and work product manufacturing. The population is continuing to grow and people continue to be attracted to the valley and are making it their home. Businesses also are being attracted to the valley because of its attractiveness and high quality of life.

In this new economy with its more focused growth in a broad range of services, it is increasingly clear that future economic prosperity heavily depends upon the quality and quantity of the state's human resources. So, more and more workers will be workers in transition – transitioning not only between jobs and sometimes between career paths, but more often than not transitioning within jobs where skills and other workplace requirements are always changing.ⁱⁱⁱ

Education at virtually all levels – particularly secondary, post-secondary, and lifelong – will need to transition away from excessive structure and hierarchical organization that interferes with more seamless and inter-coordinated education and training paths that fit the career paths of more and more individuals, navigating and trying to advance in a changing economy and changing work place.

There does seem to be a lot of soul-searching and re-thinking of educational programming at all levels. However, the pace of change among educational planners largely operating within the constraints of their various institutions and stratifications of existing programming is too slow to match the pace of change in the economy itself.

To accommodate this growth and change there will need to be a much greater commitment to area higher education. For an area like the Bitterroot Valley this need could be provided under the

auspices of a more fully developed community college in the valley.

A recent report by Social Policy Research Associates done for the U.S. Department of Labor notes:

Career pathway-oriented workforce development has the goal of increasing individuals' educational and skills attainment and improving their employment outcomes while meeting the needs of local employers and growing sectors and industries. [They] offer a clear sequence, or pathway, of educational coursework and/or training credentials aligned with employer-validated work readiness standards and competencies – more flexible avenues and opportunities for relevant education and training – to attain marketable skills so that they can more easily find work in growing careers. These comprehensive education and training systems are particularly suited for working learners and nontraditional students.^{iv}

The health, sustainability, and expansion of the local Ravalli County economy is dependent on reliable and convenient access to comprehensive, responsive, and quality higher education and workforce education and training services, as well as quality education carefully tailored to the needs of communities in the surrounding area. A 2013 report noted:

Despite the promise of Ravalli County, the area has not been able to develop and attract sufficiently diversified economic opportunities to serve its population. Ravalli County median income, per capita income, postsecondary degree attainment, and consumer spending on education are all lower than State and National averages. Unemployment in Ravalli County remains at 7.3 percent (November 2012), although this is down from a high of 11.3 percent in January 2011. Arguably the lack of local access to postsecondary education has played a role in the county's economic struggles. Without local, responsive employee training opportunities, new businesses may have been hesitant to locate in the area and existing businesses have suffered as qualified workers were hard to find.^v

Bitterroot College

In May 2007 residents of Ravalli County, Montana voted to establish the Bitterroot Valley Community College district. Following this successful

local ballot initiative, however, the Montana Board of Regents in late 2008 voted to not recommend the establishment of the district to the State Legislature; and in February 2009 the State Senate Education Committee voted to not send a bill establishing the new community college district to the State Senate floor for a full vote. Consequently, the Bitterroot Valley Community College district was never established. After this defeat, the Montana Board of Regents requested that local college advocates work with The University of Montana (UM) to develop a plan to provide area residents with postsecondary access.^{vi}

Bitterroot College's first year of operation was in 2009 with 28 students. By 2013 and its fourth year of operation the college had over 200 college students and 250 continuing education students.^{vii}

Until the establishment of the Bitterroot College in fall 2009, Ravalli County was the most populous county in the state without a local unit of higher education.^{viii}

A strategic plan for the college was produced in 2012 containing information generated in an earlier report by Maas Consultants.^{ix}

The Maas report provides a year-by-year growth projection table beginning in 2010 and ending in 2025. Growth projections are grounded in the assumptions that the student participation rate (SPR-see definition in prior section) for the Bitterroot College Program will reach 25, that population will maintain an approximate growth rate of 1.17 percent through 2025, and that —broad-based and appropriate course offerings will be forthcoming, allowing students to steadily increase their course load each year (Maas, p. 41).

Balancing these assumptions with the information gleaned in the environmental scans and the survey analysis, the report concludes that the BCP should reach a headcount of 440 students by 2015 (214.4 FTES/3,215.3 WSCH1), 630 students by 2017 (330.1 FTES/4,952.0 WSCH), and ultimately 1,236 students by 2025 (827.1 FTES/12,407.2 WSCH) (Maas, p. 42).

Notably, with spring 2011 BCP enrollment data now available, the first year of report-projected enrollment (2011) can be compared against actual enrollment numbers. For 2011 the Maas Report predicted 134 headcount and 55.7 FTE. Actual spring 2011 BCP headcount numbered

139 with FTE at 64.3. Actual enrollment and predicted enrollment are indeed very close for 2011.

Semester by semester headcounts recorded by Bitterroot College were: Fall 2009 (28), Spring 2010 (75), Fall 2010 (111), Spring 2011 (135), Fall 2011 (181), Spring 2012 (194), Fall 2012 (214).^x However, after 2012 the college's growth had subsided and in 2015 the headcount stood at only 200. The 2013 Expansion Plan noted:

Bitterroot College and Gallatin College are the newest 2-year units in Montana, each only several years old; while the two schools' appreciably low student participation rates are likely related to their newness, it is remarked that the two units are funded at rates lower than the State's other 2-year units. Lack of sufficient resources is likely also a factor in the units' ability to service their regions. Notably, if the Bitterroot College service area student participation rate (SPR) were equal to the average student participation rate of the top three rates in the chart below (SPR average of top three colleges is 22.9) headcount at the Bitterroot College would be 924.

Bitterroot College Service Area

There is no single way to define the areal extent of a community college service area. And distances will vary depending upon local area population characteristics and area geographic features. However, much of the College's past student base has come from communities in the immediate area. If we look at the population of a 35-mile zone surrounding the City of Hamilton there is a population of nearly 44,000 and this population is steadily growing.^{xi} This compares with a population of 12,300 and 10,800 in the 35-mile zones surrounding Miles City and Glendive, respectively; two of Montana's local areas that already have independent community colleges.

Bitterroot College also is tasked with providing area workforce development education and training for a labor force of over 20,000 individuals. This labor force is more than 6,000 workers greater than the combined labor force of a six-county area around Miles City and the Miles Community College, including workers in Custer, Rosebud, Powder River, Carter, Fallon, and Prairie

Counties. Ravalli County's workforce also is nearly 11,000 workers greater than a four-county area around Glendive and Dawson Community College.^{xii} In fact, four Montana public colleges serve significantly smaller local area populations than the Bitterroot College: MSU Northern 20,000 residents, Miles CC 12,300 residents, UM Western 11,600 residents, and Dawson CC 10,800 residents.^{xiii}

[See attached map of area population counts for 35-mile zones around Montana cities and labor force and population comparisons.]

ⁱ Swanson, Larry, O'Connor Center for the Rocky Mountain West, U. of MT, "Ravalli County Economic Needs Assessment," prepared for the Ravalli County Economic Development Authority, 2002

ⁱⁱ Keynote address by Larry Swanson, 2nd Annual Bitterroot Community Symposium entitled, "Sensing Opportunity," Bitterroot College, Hamilton MT, November 3rd, 2017

ⁱⁱⁱ Swanson, Larry, O'Connor Center for the Rocky Mountain West, U. of MT, "Future Job Growth in Montana – Aligning Education and Workforce Development with Expected Future Job Growth," produced for the Montana State AFL-CIO with funded by the U.S. Dept. of Labor, July, 2012

^{iv} Social Policy Research Associates, "Career Pathways Toolkit – Six Key Elements for Success," Sept., 2011, p. 9

^v Bitterroot College, "Comprehensive Two-year Mission Expansion Plan," submitted to the Office of Deputy Commissioner for Two-year and Community College Education, Dr. John Cech, with consultant support by College Brain Trust, 2013, p. 4

^{vi} Ibid, Bitterroot College, 2013, p. 3

^{vii} Ibid, Bitterroot College, 2013, p. 3

^{viii} Ibid, Bitterroot College, 2013, p. 4

^{ix} Bitterroot College Program Steering Committee, "BCP Strategic Plan and Maas Report," submitted to the Montana Board of Regents and University of Montana, January, 2012

^x Op.cit., Bitterroot College, 2013, p. 7

^{xi} Dr. Larry Swanson, O'Connor Center for the Rocky Mountain West, U. of MT, recent communications.

^{xii} Ibid.

^{xiii} Ibid.

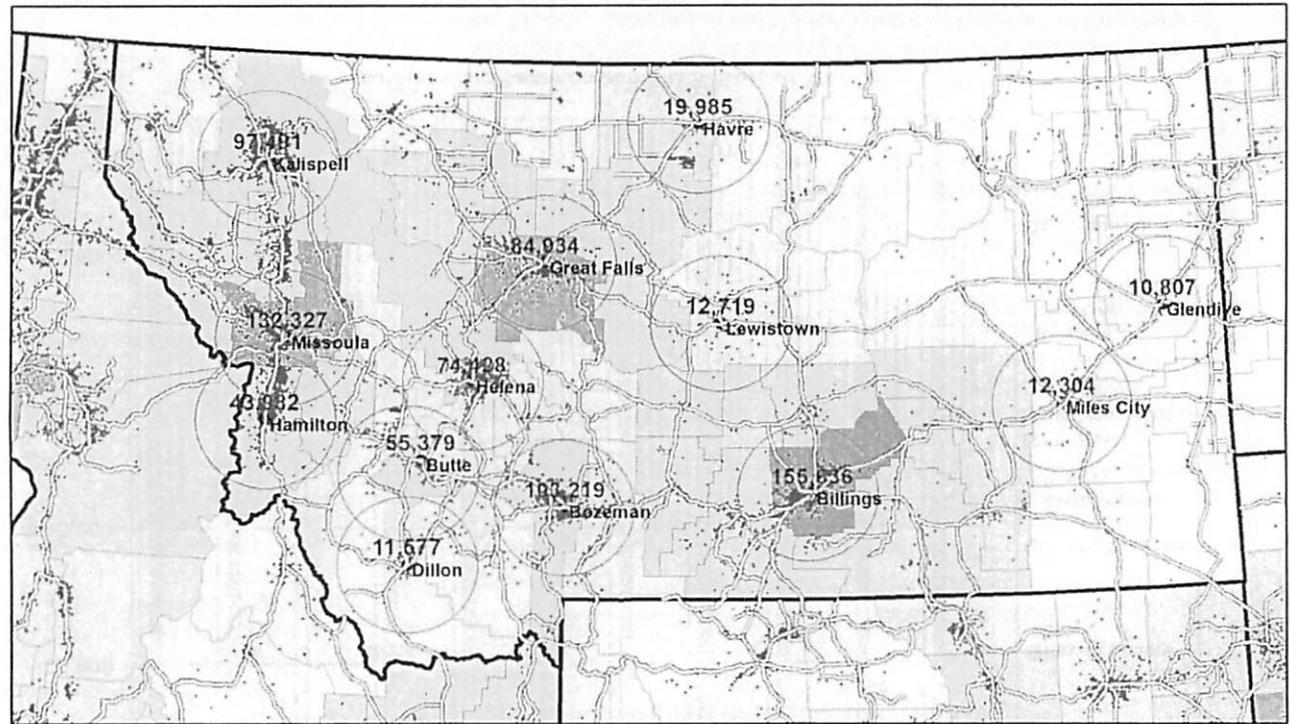
Populations residing within 35-mile commuting zones of Montana cities

This map shows populations residing within 35 miles of major cities and towns in Montana at the time of the 2010 Census – local market areas where higher ed units are located.

The largest populations reside in and around seven main cities that each have significant higher education entities including Billings (MSU-Billings and City College) – almost 156,000 people, Missoula (University of Montana and Missoula College) with over 132,000, followed by Bozeman (MSU-Bozeman and Gallatin College) at 103,000, Kalispell (Flathead Valley Community College) at 97,000, Great Falls (University of Providence and Great Falls College) at 85,000, and Helena (Carroll College and Helena College) at 74,000. At a significantly lower level is Butte (Montana Tech and Highlands College) with 55,000.

Montana's other colleges are in Dillon (Western) with a surrounding population of 11,600 and Havre (Northern) with 20,000.

Other two-year education providers are in Miles City (Miles Community College) with 12,300 and Glendive (Dawson Community College) with an areal population of 10,800. Montana also has seven tribal colleges located in more sparsely populated areas (Salish Kootenai College in Lake Co., Blackfeet in Glacier Co., Fort Peck in Roosevelt, Aaniiih Nakoda in Blaine, Chief Dull Knife in Rosebud, Little Big Horn in Big Horn, and Stone Child in Choteau).



● = 30 persons

The largest areal population outside of the main seven cities is nearly 44,000 residing within 35 miles of Hamilton in Ravalli County and this area's higher education needs are served by Bitterroot College which operates under the University of Montana in Missoula. It began in 2011. The Montana University System's independent two-year units are in Kalispell (FVCC), Glendive (Dawson CC), and Miles City (Miles CC).

Source: Prepared by Dr. Larry Swanson, O'Connor Center for the Rocky Mountain West, University of Montana, 2018

Read Multi-County Core-Based Regions ^

- 3rd "Tier" Metro Cores of 100,000 to 160,000
...adjacent and closely linked counties
- Large Regional Trade Centers, 60,000 to 100,000
...adjacent and closely linked counties
- Small Regional Trade Centers, 30,000 to 60,000 ~
...adjacent and closely linked counties
- Isolated Rural Centers (Counties under 35,000
with places 10,000 to 20,000 pop.)
- Small Isolated Rural Counties Under 35,000
with no place of 10,000 pop.

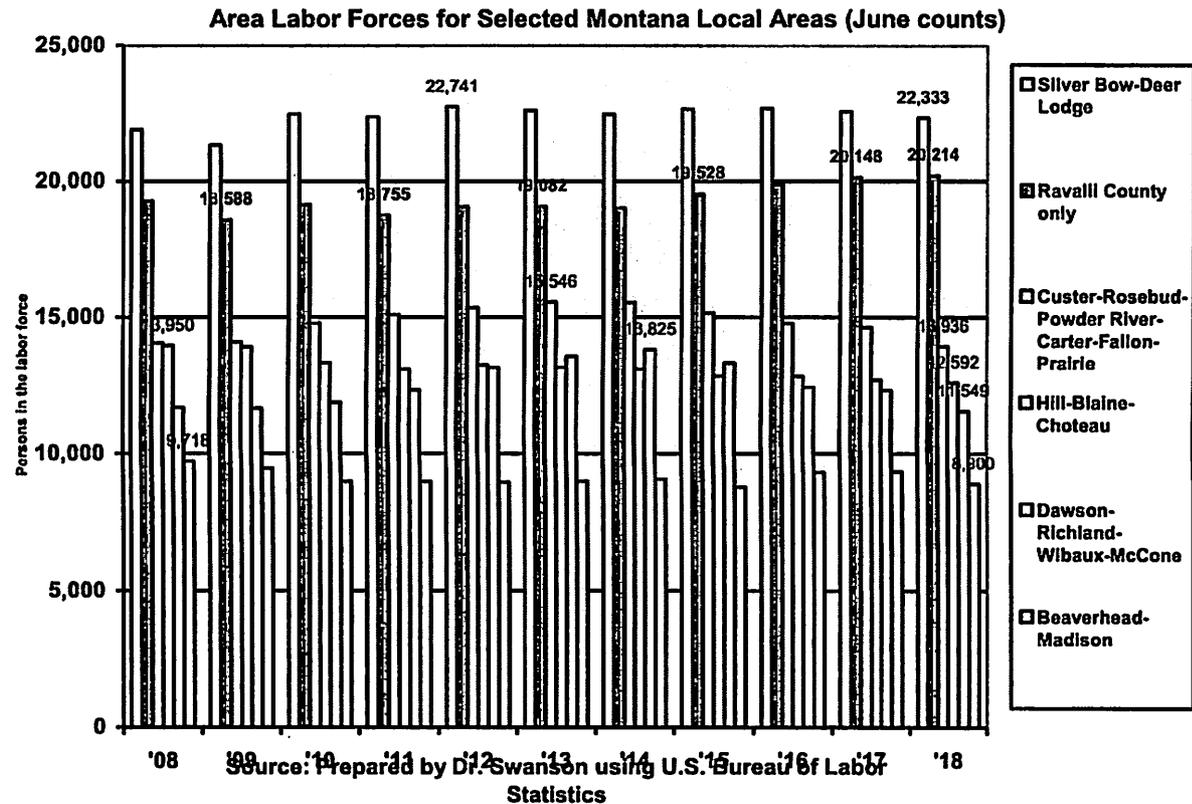
Area Labor Forces for Local Areas in Montana with Units of Higher Education

The chart at the right shows area labor force counts for June each year from 2008 until 2018. The period from 2008 until 2010 is when a national economic recession was occurring. Since 2010 the nation and most areas within the U.S. have experienced gradual economic recoveries.

The labor force for Ravalli County only is compared with the combined labor forces for the following: Silver Bow and Deer Lodge Cos., Custer-Rosebud-Powder River-Carter-Fallon-Prairie Cos. (area counties for Miles CC), Hill-Blaine-Choteau Cos. (area counties of MSU-Northern), Dawson-Richland-Wibaux-McCone Cos. (area counties for Dawson CC), and Beaverhead-Madison Cos. (area counties for Western of UM).

For this entire 11-year period the peak labor force year for Silver Bow-Deer Lodge was 2012 at 22,741. In 2018 this stood at 22,333. For the Custer-Rosebud-Powder River-Carter-Fallon-Prairie Counties area the peak labor force year was 2013 at 15,546. In 2018 this had fallen to

13,936, a 10% decline. The labor force for the Hill-Blaine-Choteau Counties area in 2008 was 13,950. By 2018 this had fallen to 12,592, also a 10% decline. The Dawson surrounding 4-county area had a peak labor force during this period of 13,825 in 2014. Four years later in 2018 this had fallen to 11,549, a 19% fall. And the Beaverhead-Madison labor force had its peak in 2008 at 9,718 before falling to 8,900 by 2018, an 8% decline.



While labor force growth in all of these multi-county areas is stagnant or declining the labor force of Ravalli County, considered by itself, is growing. Its peak during this period is in 2018 at 20,214. This is only moderately smaller than the labor force of Silver Bow and Deer Lodge Counties combined. Ravalli's labor force is significantly larger than all of the other areas that either have independent two-year community colleges or 4-year colleges. Community colleges are flexible in offering customized curriculums for area work forces and employers and need to be nearby adults who need this education and training while they are also working.

Ravalli County Population Growth

The population of Ravalli County has steadily grown from 14,543 in 1970 to 25,068 in 1990 – an increase of more than 10,500 residents with most of this gain in the '70s. From 1990 to 2000 the county's population grew by over 11,000 – a 45% increase which was the fastest growth during that time of any county in Montana.

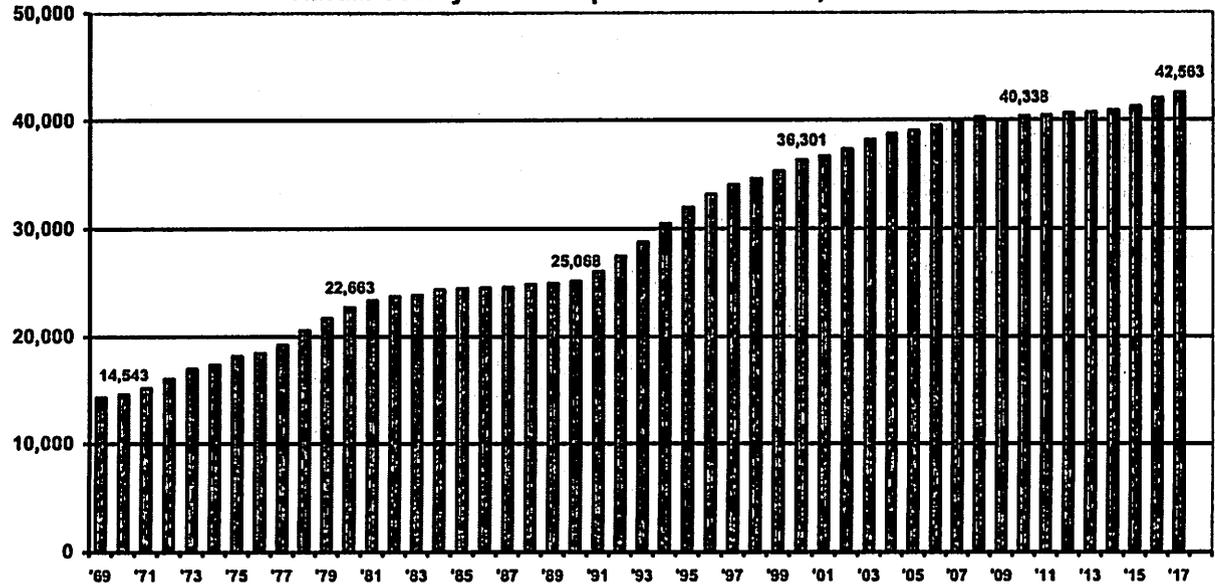
Growth slowed and the population grew by about 4,000 from 2000 to 2010. Population even fell in one year (2009).

The county's total population in July, 2017, stood at 42,563, up from 42,088 in 2016 and 41,295 in 2015. Today, Ravalli County has the 7th largest population among Montana's 56 counties. The county's population, growing at 1% to 1.5% a year as currently projected would approach or exceed 50,000 by 2030.

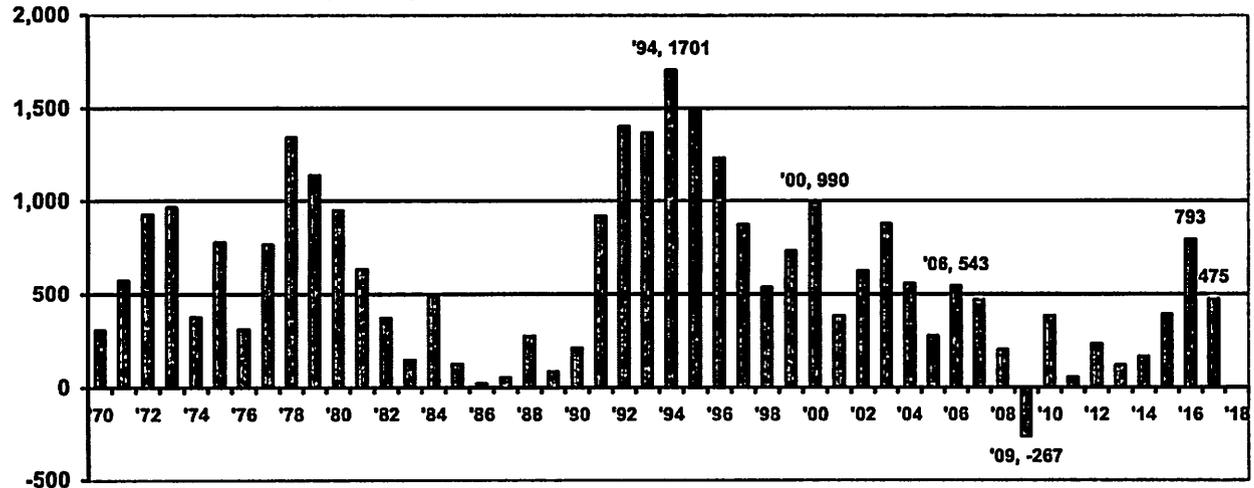
The county has the 7th largest total personal income base in the state at \$1.64 billion dollars in 2016. Total full- and part-time employment in Ravalli County in 2016 was 21,215, 8th among all counties in the state.

Prepared by Dr. Larry Swanson, O'Connor Center for the Rocky Mountain West, UM

Ravalli County's Total Population Over Time, 1969-2017



Yearly Change in Population Over Time in Ravalli Co., 1969-2017



rec'd
8-31-20
D. Stank

Community College Development Criteria

Bitterroot Valley Community College

Prepared for the Montana Board of Regents

Prepared by the Trustees-Elect, Proposed Bitterroot Valley Community College

Submitted August 14, 2020

Table of Contents

List of Tables and Attachments.....	2
Introduction.....	3
Background.....	3
Rationale for Establishment of Bitterroot Valley Community College.....	3
Community Benefits of Bitterroot Valley Community College.....	5
Operating Budget Proposal.....	6
Educational Objective/Academic Program Plan.....	12
Academic Mission.....	12
Academic Programming Strategy.....	13
Student/Academic Support Strategy.....	15
Infrastructure – Facilities, Equipment, & Information Technology.....	17
Attachments.....	19

List of Tables and Attachments

Table 1. Timeline of key events leading to present Bitterroot Valley Community College effort.....	4
Table 2. Projected enrollment.....	6
Table 3. Projected tuition and fee rates.....	7
Table 4. Projected inventory and validation of fees.....	8
Table 5. Projected revenue.....	9
Table 6. Projected expenditures.....	10
Table 7. Projected staffing.....	11
Table 8. Academic programs suggested from current labor market data.....	14
Attachment A. Bitterroot College Director memo to UM Provost, 2018.....	19
Attachment B. Bitterroot College Advisory Council letter to UM leadership, 2018.....	20
Attachment C. Ravalli County Workforce Alliance Letter to Ravalli County Elections, 2019.....	21
Attachment D. Enrollment calculation detail.....	22
Attachment E. Revenue calculation detail (two tables).....	23
Attachment F. Expenditure calculation detail (six tables).....	25
Attachment G. Staffing calculation detail.....	31
Attachment H. Organizational chart (for positions on Unrestricted Operating Account only).....	32
Attachment I. Sample instructional contract.....	33

Introduction

On May 5, 2020, voters from Corvallis, Darby, Hamilton, Lone Rock, Stevensville, and Victor school districts in Ravalli County, Montana approved, by a 59% majority, a proposal to organize the Bitterroot Valley Community College District. On the same ballot voters also elected the first Board of Trustees to manage and administer the newly proposed district: Janet Woodburn, RAN Pigman, Don Gardner, Gary Carlson, Sue Smith, Linda Doughty, and Marci Smith.¹

Having met the statutory criteria ([MCA 20-15-201](#)) for establishment of a community college district and pursuant to the prescribed process, the Bitterroot Valley Community College District's Board of Trustees-Elect is submitting the requested information to the Montana Board of Regents. The Trustees-Elect formally request an endorsement and a favorable recommendation from the Board of Regents to the Montana Legislature to officially organize the Bitterroot Valley Community College District.

Background

The Bitterroot College University of Montana was formed as a program of the University of Montana (UM) following the failure of the Montana Legislature to establish the community college district requested and approved by the voters of Ravalli County in an election held in 2007. The program is funded and administered under the Office of the UM Provost and is not a recognized unit of the Montana University System (MUS), as referenced by Montana Statute [MCA 20-25-201: Units Constituting University System](#). Table 1 provides background to understand the history of efforts to establish the Bitterroot Valley Community College.

Rationale for Establishment of Bitterroot Valley Community College

Ravalli County residents face the barriers to training inherent in a large, primarily rural geographic area with a diverse employment landscape. In the current economically stressed environment local access to degree and workforce training programs is critical. Workforce training requests by local businesses to train or re-train and re-tool in response to a changing economy, a crisis like Covid-19, or the rapidly changing demographics of the county, cannot be efficiently provided without local program authority, access, and capacity. And, without local access residents face significant program and travel expenses, as well as a time commitment that complicates work and family priorities.

The Montana Board of Regents have acknowledged the need for locally accessible higher education opportunities in Ravalli County with a variety of actions since 2005, by including the Bitterroot College Program in the adoption of the Mission and Vision for State two-year units in 2011, and by renaming the program to Bitterroot College UM in 2012. But the actions have stopped short of officially recognizing Bitterroot College UM as an Official Unit of MUS and have not afforded a measure of autonomy and local administrative oversight.

Even though Bitterroot College UM is not an officially recognized unit of the MUS, it has functioned, as much as possible, as a true college unit, providing students local access to the course work necessary to achieve an Associate of Arts degree or some non-college-credit workforce certifications. However, over the years of operation, the administrative functions and budgets continue to operate as a program of the UM Provost. The funding has remained static in the face of

¹ [Ravalli County election results](#).

Table 1. Timeline of key events leading to present Bitterroot Valley Community College effort.

2005	Ravalli County stakeholders research workforce training delivery options, determine community college option maximizes programming opportunities
2006	Local stakeholders follow community college district organizing statute; successfully petition local voters to put community college proposal on ballot
2007	Montana Board of Regents (BOR) consents to UM's opening the Hamilton Higher Education Center (HHEC) to provide "access to coursework toward degrees at The University of Montana or another accredited higher education institution, to workforce training, and to college preparation in closer proximity to their residences [in Ravalli County]" ² First Bitterroot Valley Community College District organizing proposal wins at ballot box
2008	BOR votes to not recommend the organization of Bitterroot Valley Community College District to Montana Legislature
2009	State Senate Education Committee, in a four to three decision, tables motion to send the resolution organizing the Bitterroot Valley Community College District to State Senate floor for a full vote BOR terminates HHEC and permits UM's Bitterroot College Program (BCP), authorizing UM "to deliver higher education in the Bitterroot Valley in an ongoing manner with guidance from [a local] steering committee" ³
2010	BCP Steering Committee releases <u>needs assessment</u> conducted by Maas Companies, Inc.
2011	BCP included in BOR's adoption of a <u>comprehensive 2-year education mission/vision</u> for the State's 2-year units ⁴ BCP Steering Committee submits <u>5-year strategic plan</u> to UM and BOR
2012	BCP included in BOR's rebranding of Montana University System (MUS) 2-year units; BCP renamed Bitterroot College UM ⁵ Bitterroot College (BC) Director notifies UM Provost of need for organizational changes if BOR 2-year mission is to be pursued (Attachment A) BC Advisory Council sends letter to UM leadership addressing need for organizational change if BOR 2-year mission is expected (Attachment B) No UM action follows communications
2018	Ravalli County stakeholders form Ravalli County Workforce Alliance (RCWA); RCWA deliberates on path forward for BC as provider of locally accessible career and technical education; discussions with local legislators and consultations with Larry Swanson, PhD economist and Director of UM's O'Connor Center for the Rocky Mountain West, ⁶ lead RCWA to conclude the organization of a locally controlled community college district would provide the community with the autonomy, funding, and recognition required for viable workforce training in Ravalli County
2019	RCWA submits letter to Ravalli County Elections requesting approval of a petition to solicit signatures for the placement of a proposal to organize Bitterroot Valley Community College District on May 2020 school district ballot (Attachment C).
2020	Elections office certifies sufficient petition signatures, clearing way for second Bitterroot Valley Community College District organizing election in May 2020

² May 2007 Board of Regents Meeting: Agenda/Minutes, pp. 85-86.

³ May 2009 Board of Regents Meeting: Minutes, pp. 11-12.

⁴ May 2011 Board of Regents Meeting: ITEM 151-103-R0511.

⁵ May 2012 Board of Regents Meeting: ITEM 155-106-R0512.

⁶ Swanson, L. (2018). Ravalli County's Economic Development Needs and Opportunities - part 1, part 2.

increasing operating costs. The financial restraints have resulted in reductions in the portion of the budget dedicated to instruction and student supports. Additionally, limited program access and the required course and faculty approvals have handicapped the ability to respond to local workforce training requests and the flexibility to offer programming and schedules necessary to accommodate the needs of students, residents, and the business community. The demand for courses, programs, and services exceeds the capacity of Bitterroot College UM to meet the demand.

Especially affected by the current governance and funding structure is the Bitterroot College's ability to provide college-credit career and technical programming. After over a decade of operation, Bitterroot College cannot boast a career and technical degree or certificate program. Despite Federal funds to develop and implement a Computer Support CAS⁷ and a Welding CAS at Bitterroot College, these programs lapsed when Federal support ended. When prospects arose to establish a dental hygiene program and a license practical nurse program for delivery at Bitterroot College, despite the presence of outside development and capital improvement funding, UM did not approve these requested programs.

Community Benefits of Bitterroot Valley Community College

When established, the new Bitterroot Valley Community College will have the authority, resources, and recognition required to achieve the comprehensive two-year education mission/vision as charged by the Montana Board of Regents. The new Bitterroot Valley Community College will have the authority to plan, develop, implement, and sustain academic programs responsive to its community's needs, independent of UM approval.

The new Bitterroot Valley Community College will also have access to a wider range of funding options than Bitterroot College UM. Local funds can help support college and continuing education operations and facilities. Federal Career and Technical Education dollars (Perkins Grant funding) can be awarded in support of locally accessible workforce programming. Private donors can contribute directly to the college's own foundation for capital campaigns and endowment development. Moreover, state, tuition, and fee monies will flow directly to the new college and stay with the new college.

The time has come to finally take the actions necessary to establish the Bitterroot Valley Community College District and to undertake the work necessary to transition Bitterroot College UM to a locally controlled community college district.

The subsequent sections of this document provide an overview of what the Bitterroot Valley Community College could achieve in service to its community and its State if it were reorganized and established as a local community college. Notably, the governance and funding structure for a Montana community college district would allow the two-year campus in Ravalli County to focus on effectiveness with locally elected Trustee oversight ensuring accountability, transparency, and efficiency. Under the vested management and authority of a local Board of Trustees, the new Bitterroot Valley Community College would have the necessary autonomy, resources, and recognition to pursue the full comprehensive two-year education mission and vision as directed by the Board of Regents. Importantly, the new college will provide a path forward for establishing and sustaining locally responsive, college-credit-bearing workforce development programming, as well as meeting the requirements for transferrable degrees and credits for students who will pursue university level degrees.

⁷ CAS = Certificate of Applied Science

Operating Budget Proposal

The operating budget proposal presented in this section projects fall 2023 as the first semester of Bitterroot Valley Community College operations. After organization by the Montana Legislature in spring 2021, the new district will use fiscal years 2022 and 2023 to write operating policies, develop a master facilities plan, conduct an environmental scan/needs assessment, pass a voted levy, establish a foundation, and work with UM and Bitterroot College leadership to ensure a seamless transition for student matriculation to the new community college. The enrollment, tuition, fees, revenue, expenditures, and staffing numbers provided in the subsequent tables are derived from 10 years of experience operating Bitterroot College UM as well as conversations with leadership from Dawson Community College and Miles Community College. Revenue calculations are based on the Legislature’s current community college funding formula ([MCA 20-15-310](#)).

- *Projected annual full-time equivalent (FTE) students, with Fall semester headcount (counts split out by in-district/in-state/out-of-state students) – See Table 2; see Attachment D for enrollment calculation detail.*

Table 2. Projected enrollment.

Bitterroot Valley Community College

Enrollment

Fiscal Year Student FTE - Average Annual Enrollment

Student FTE	FY22	FY23	FY24	FY25	FY26
Resident	0	0	177	185	195
Non-resident	0	0	0	0	0
WUE	0	0	0	0	0
Student FTE Total	0	0	177	185	195

Reminder: final enrollment at end-of-term, fiscal year enrollment = ((summer + fall) + spring) / 2

Headcount	Fall 2021	Fall 2022	Fall 2023	Fall 2024	Fall 2025
Resident	0	0	308	324	340
Non-resident	0	0	0	0	0
WUE	0	0	0	0	0
Headcount Total	0	0	308	324	340

Analysis: Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY22 Student FTE; FTE to Headcount ratio is 1:1.25 for on-campus students; FTE to Headcount ratio is 1:3 for dual enrollment students; for the purpose of this exercise, no Non-resident or WUE Students are presumed.

- *Per credit tuition and fee rates – See Table 3.*

Table 3. Projected tuition and fee rates.

THE MONTANA UNIVERSITY SYSTEM					
Inventory and Validation of Fees -- Fiscal Year 2024					
Undergraduate Mandatory Fees -- Rates per Semester					
Unit Name: Bitterroot Valley Community College					
Course Credit	Fees	In-District Tuition	Out of District Tuition¹	WUE²	Out of State³
1	25.00	95.00	114.00	199.50	256.50
2	50.00	190.00	228.00	399.00	513.00
3	75.00	285.00	342.00	598.50	769.50
4	100.00	380.00	456.00	798.00	1026.00
5	125.00	475.00	570.00	997.50	1282.50
6	150.00	570.00	684.00	1197.00	1539.00
7	175.00	665.00	798.00	1396.50	1795.50
8	200.00	760.00	912.00	1596.00	2052.00
9	225.00	855.00	1026.00	1795.50	2308.50
10	250.00	950.00	1140.00	1995.00	2565.00
11	275.00	1,045.00	1254.00	2194.50	2821.50
12	300.00	1,140.00	1368.00	2394.00	3078.00
13	325.00	1,235.00	1482.00	2593.50	3334.50
14	350.00	1,330.00	1596.00	2793.00	3591.00
15-21	375.00	1,425.00	1710.00	2992.50	3847.50
FY24					
FTE Rate	375.00	1,425.00	1,710.00	2,992.50	3,847.50

¹ *Out of District Tuition is 20% higher than In-District Tuition*

² *WUE Tuition is 75% higher than Out of District Tuition*

³ *Out of State Tuition is 125% higher than Out of District Tuition*

- *Inventory and validation of fees for first three years of operation – See Table 4.*

Table 4. Projected inventory and validation of fees.

Bitterroot Valley Community College					
Inventory and Validation of Fees -- Fiscal Years 2024, 2025, & 2026					
Tuition Rates per Semester for a Full Time Student (12 credits)					
Category	FY 24 Tuition	FY 25 Tuition	% Increase	FY 26 Tuition	% Increase
In-District	1,140.00	1,140.00	0.0%	1,140.00	0.0%
Resident UG	1,368.00	1,368.00	0.0%	1,368.00	0.0%
WUE	2,394.00	2,394.00	0.0%	2,394.00	0.0%
Nonresident UG	3,078.00	3,078.00	0.0%	3,078.00	0.0%
Mandatory Fees per Semester for a Full Time Student					
Category	FY 24 Fees	FY 25 Fees	% Increase	FY 26 Fees	% Increase
In-District	300.00	300.00	0.0%	300.00	0.0%
Resident UG	300.00	300.00	0.0%	300.00	0.0%
WUE	300.00	300.00	0.0%	300.00	0.0%
Nonresident UG	300.00	300.00	0.0%	300.00	0.0%
Total, Tuition and Mandatory Fees per Semester for a Full Time Student					
Category	FY 24 Total	FY 25 Total	% Increase	FY 26 Total	% Increase
In-District	1,440.00	1,440.00	0.0%	1,440.00	0.0%
Resident UG	1,668.00	1,668.00	0.0%	1,668.00	0.0%
WUE	2,694.00	2,694.00	0.0%	2,694.00	0.0%
Nonresident UG	3,378.00	3,378.00	0.0%	3,378.00	0.0%

- Revenue amounts distributed by source (state, net tuition, and local funding) – See Table 5; see Attachment E for revenue calculation detail.

Table 5. Projected revenue.

Bitterroot Valley Community College

Current Unrestricted Revenue & Metrics

REVENUE	FY22	FY23	FY24	FY25	FY26
State Support	\$0	\$0	\$1,092,250	\$1,126,356	\$1,161,654
Local Funding	\$0	\$0	\$650,000	\$650,000	\$650,000
Net Tuition Revenue	\$0	\$0	\$526,830	\$553,172	\$580,830
Transfers/Other	\$0	\$0	\$12,500	\$25,605	\$43,086
Total Operating Revenue	\$0	\$0	\$2,281,580	\$2,355,132	\$2,435,569
Student FTE	0	0	177	185	195
Resident Students	0	0	161	185	195
Non-resident Students	0	0	0	0	0
Key Metrics					
State % Share	0.0%	0.0%	47.9%	47.8%	47.7%
State Support per Res FTE	\$0	\$0	\$6,784	\$6,076	\$5,968

Analysis: Transfers/Other include General Fund carry overs from succeeding FY; Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY24 Student FTE; for the purpose of this exercise, no Non-resident Students are presumed.

- Expenditures by Program Area (Instruction, Academic Support, Student Services, Inst. Support, & Operations & Maintenance)- See Table 6; see Attachment F for expenditures calculation detail.

Table 6. Projected expenditures.

Bitterroot Valley Community College Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY22	FY23	FY24	FY25	FY26
Instruction	\$0	\$0	\$930,892	\$954,164	\$978,018
Academic Support	\$0	\$0	\$218,442	\$223,903	\$229,501
Student Services	\$0	\$0	\$309,703	\$317,446	\$325,382
Institutional Support	\$0	\$0	\$652,116	\$668,419	\$685,129
Operation & Maintenance	\$0	\$0	\$157,946	\$161,895	\$165,943
Total CU Exp (net of waivers/SA)→	\$0	\$0	\$2,269,100	\$2,325,828	\$2,383,973
Student FTE	0	0	177	185	195
Key Metrics					
% Instruction Exp	0%	0%	41%	41%	41%
% Instruct/Acad/Stud Ser	0%	0%	64%	64%	64%
Expenditures per Student	\$0	\$0	\$12,852	\$12,546	\$12,248

Analysis: Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY24 Student FTE; for the purpose of this exercise, Expenditures are increased annually from FY24 by 2.5% as an inflationary adjustment.

- Full-time equivalent employees, split out by categories: faculty, administration & professionals, classified staff; total expenditures on personnel services – See Table 7; see Attachment G for staffing calculation detail; see Attachment H for organization chart.

Table 7. Projected staffing.

Bitterroot Valley Community College

Current Unrestricted Faculty/Staff FTE & Metrics

STAFFING <small>(full-time equivalent)</small>	FY22	FY23	FY24	FY25	FY26
Contract Faculty (all)	0.0	0.0	12.8	12.8	12.8
Contract Professional & Admin.	0.0	0.0	6.0	6.0	6.0
Classified Staff FTE	0.0	0.0	8.0	8.0	8.0
Total Faculty/Staff	0.0	0.0	26.7	26.7	26.7
EXPENDITURES					
Personnel Services	0	0	1,868,600	1,915,315	1,963,198
Total Expenditures <small>(net of waivers)</small>	0	0	2,269,100	2,325,828	2,383,973
Student FTE	0	0	177	185	195
Key Metrics					
Student to Faculty Ratio	0.0	0.0	13.8	14.5	15.3
%Personnel Services of Total	0%	0%	82%	82%	82%

Analysis: For the purpose of this exercise, Expenditures are increased annually from FY24 by 2.5% as an inflationary adjustment; Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY24 Student FTE.

Educational Objective/Academic Program Plan

The academic mission, academic programming strategy, and student/academic support strategy for Bitterroot Valley Community College will be guided by Montana Board of Regents policy and directive per the Regents' responsibility to supervise and coordinate the State's community colleges.⁸

Academic Mission

The mission of Bitterroot Valley Community College will follow the mission/vision for Montana's two-year education as adopted by the Board of Regents in May 2011.⁹

Vision Statement

Transform lives and create opportunities through educating the citizens of the state of Montana.

Mission Statement

Provide a comprehensive, accessible, responsive, student-centered learning environment that facilitates and supports the achievement of individuals' professional and personal goals, and enhances the development of Montana's citizens, communities, and economy.

Key Purposes

- Transfer Education through the Associate's Degree
- Workforce Development, including Certificates and Applied Associate's Degrees
- Developmental and Adult Basic Education
- Lifelong Learning
- Community Development

Key Attributes

- Open Access Admissions
- Affordable
- Student-Centered
- Adult Focused and Accessible Learning
- Responsiveness to Local Needs
- Cultivation of Partnerships

⁸ The Constitution of the State of Montana, Article X, Part X, Section 9 (2)(a).

⁹ May 2011 Board of Regents Meeting: ITEM 151-103-R0511, Mission/Vision document.

Academic Programming Strategy

- *Academic programming strategy, including rationale for balance between “transfer” (e.g. A.A. and A.S.) and “terminal” (e.g. certificate, A.A.S.) workforce development programming*
- *Summary of needs assessment/gap analysis that supports academic programming strategy*

The needs and interests of the district’s residents as well as the needs and interests of the State of Montana will guide the academic programming strategy for Bitterroot Valley Community College. Likewise, community and state demand will guide the balance between transfer programming and terminal workforce development programming for Bitterroot Valley Community College.

It is noted that a 2017 analysis of labor market outcomes for Montana college graduates concluded general studies program graduates (AA/AS students) were presently in considerable oversupply in the State.¹⁰ Being cognizant of this type of graduate oversupply issue is critical when managing academic programming and advising students on degree pathways. Bitterroot Valley Community College will grow and shrink academic programs according to local, state, and regional labor market analyses and will emphasize the communication of labor market demand information to students. Moreover, Bitterroot Valley Community College will develop academic programs and structure academic advising following the guided pathways model—ensuring clarity in program progression, timeliness in program completion, and transparency in program workforce outcomes.¹¹

With respect to assessing local interests, tools to inform academic program development will include the establishment of local industry sector advisory boards and the establishment of a local government advisory board (including representation from county, municipal, and school district governments) as well as input from the Bitterroot Community Management Team (CMT; an existing local workforce development organization which includes multiple local/state/federal government and non-profit partners from the labor & industry and health & human services sectors). Additionally, depending on the circumstance, ad hoc community forums, focus groups, and surveys will be employed to gather relevant program development assessment data. With respect to assessing state interests in programming, the Department of Labor and Industry, the Office of the Commissioner of Higher Education, the Office of Public Instruction, various state-wide industry associations, and the state’s other two-year education campuses will be understood as the primary collaborating partners and information sources for academic program development.

While a final academic program strategy cannot be presented until planning resources are in place and assessment work can begin in earnest, a review of current labor market supply and demand data¹² suggests Bitterroot Valley Community College’s initial academic offerings will focus on the programs shown in Table 8. It is also anticipated the community will have an interest in developing one or more niche regional programs. Program areas likely to be considered include ***dental hygiene, sustainable agriculture, viticulture, and water resources.***

¹⁰ Watson, A., Wagner, B., Lacy, K., & Rose, E. (2017). *Meeting state worker demand: A report on the labor market outcomes of Montana colleges*. Helena, MT: State of Montana. Retrieved from <http://lmi.mt.gov/Publications/meeting-state-worker-demand>

¹¹ Bailey, T. (2017). Guided pathways at community colleges: From theory to practice. *Diversity & Democracy*, 20(4). Retrieved from <https://www.aacu.org/diversitydemocracy/2017/fall/bailey>

¹² Datasets examined: a) DLI and OCHE first-cut analysis of workforce supply and demand data, and b) Burning Glass Technologies labor insight data; datasets provided by Victoria Clark, Director, Bitterroot College UM; datasets provided to Montana two-year campus leaders via email, June 2020.

Table 8. Academic programs suggested from current labor market data.

Academic Program Department	Academic Program Certificate/Degree
Business	Bookkeeping (CTS/CAS) Management - Sales, Operations, & Small Business (CTS/CAS) Paralegal & Legal Assistant (CTS/CAS)
Computers	Computer User Support Specialist (CTS/CAS) Computer Systems Analyst (CTS/CAS)
Education	Early Childhood Education (AAS) Teacher's Aid (CTS) Childcare Worker (CTS)
Health Care	Registered Nurse (ADN/ASN) Licensed Practical Nurse (AAS) Medical Records & Health Information Technician (CTS/CAS/AAS) Dental Assistant (CTS) Medical Assistant (CTS/CAS/AAS) Nursing Assistant (CTS)
Industrial Technology	Heavy & Tractor-Trailer Truck Driver (CTS) Automotive Service Technician & Mechanic (CTS/CAS/AAS) Heating & Air Conditioning Mechanic & Installer (CTS) General Maintenance & Repair (CTS/CAS) Construction Laborer (CTS) Plumber (CTS/CAS/AAS) Welder (CAS)
Natural Resources/Agriculture	Forest & Conservation Technician (CTS/CAS)
Tourism/Recreation/Retirement	Cook, Restaurant (CAS/AAS) Food Preparation Worker (CTS/CAS)
Transfer Degrees	Associate of Arts (AA) Associate of Science (AS) <i>AA/AS coursework focused on guided pathways for bachelor's degrees in Nursing, Business (Accounting, Finance, Human Resources, & Management/Operations), Education, Psychology (Counselors & Therapists), Graphic Design, Biology, & Computer Science</i>

CTS = Certificate of Technical Studies AA = Associate of Arts Degree
CAS = Certificate of Applied Science AS = Associate of Science Degree
AAS = Associate of Applied Science Degree

- *Plan for submitting all academic programs as new programs for approval by the Board of Regents*

Regarding the submission of academic programs for Board of Regents' approval and/or notification, the Bitterroot Valley Community College will follow Board of Regents policy and the Office of the Commission of Higher Education (OCHE) procedures (as outlined in its Academic Affairs Procedural Guidebook) for all academic program establishment. Notably, in the new community college's initial years of operation, the current plan is to focus first on establishing campus certificates of under 29 credits (Certificates of Technical Skills and certain Certificates of Applied Science) which are procedurally Level 1 items, only requiring Board of Regent notification. For certificates of more than 29 credits and associate of applied science degrees, the new college will initially seek temporary program status for these curricula—also Level 1 items but requiring OCHE approval in addition to Board of Regents notification. Building Bitterroot Valley Community College's academic programs via the Level 1 campus approval and then OCHE approval pathway will allow the new college to grow at a manageable pace and will also align with present research

promoting the completion of stackable workforce credentials as students move through degree programs.¹³

- *Accreditation plans*

The Bitterroot Valley Community College will negotiate an instructional agreement with one of Montana's public institutions of higher education that is independently accredited through the Northwest Commission on Colleges and Universities (NWCCU). The instructional agreement will specify instructional conditions Bitterroot Valley Community College must meet to offer accredited college courses and grant accredited college certificates and degrees under the accreditation umbrella of the agreeing institution. Included in the instructional agreement will be terms of compensation to the agreeing institution for instructional services rendered. It is anticipated Bitterroot Valley Community College would maintain such an instructional agreement with the agreeing institution for between seven and 10 years, allowing ample time for the new community college to seek independent NWCCU accreditation. It is noted that as long as both parties agree to renewal, an instructional agreement could last indefinitely; to the best understanding, NWCCU has not set a time limit on such agreements.

Examples of like instructional agreements among institutions within the NWCCU accreditation region exist in the Oregon Community College System (see Attachment I). It is noted in the *Sample Oregon Community College and Portland Community College Intergovernmental Service Agreement* that the contract covers both instructional (academic) and administrative services. In addition to Academic Services, the Oregon sample agreement includes: a) Enrollment Services, b) Institutional Research, c) Libraries, and d) Financial Services. Depending on the interests of the agreeing institutions, Bitterroot Valley Community College could consider negotiating specific administrative services in addition to instructional services. If certain administrative services were added to the agreement, then compensation to the agreeing institution from Bitterroot Valley Community College would increase accordingly. This increase in compensation, however, would decrease the new college's budgeted expenses in the related services. In a 2014-2015 agreement between Oregon Coast Community College and Portland Community services included academic affairs, student affairs (including transcribing and financial aid services), library, and external reporting. Compensation to the providing institution in this 2014-2015 agreement was based on 10% of all faculty personnel costs (wages, benefits, and payroll taxes) plus 18%. If such a compensation formula were used between Bitterroot Valley Community College and an agreeing institution, the annual agreement cost to the new college based on budgets proposed earlier in this document would be \$105,000. This compensation amount for instructional and administrative services would be balanced by the negation of budgeted expenses for library, accreditation, and financial aid services as well as an Enterprise Management System—all of which currently account for nearly \$150,000 in expenses presented in the earlier budget section of this document.

Student/Academic Support Strategy

- *Plan for providing academic and other student support and student success strategies*

Bitterroot Valley Community College will provide academic and other student support and student success strategies under the umbrella of a student services office. The new college's student

¹³ Bailey, T. (2018). Responding to divergent trends: Vocational and transfer education at community colleges. *Change: The Magazine of Higher Learning*, 50(3-4), 113-116. doi: 10.1080/00091383.2018.1509634.

services office will include: a) enrollment services (admissions, registration, financial aid, and student records), b) academic and career advising services (including apprenticeship, internship, & community service placement and transfer support), and c) student success services (tutoring, testing/proctoring, media/library, disability support, veterans support, and mental health & human services referrals).

As mentioned in the previous *Academic Programming Strategy* section, Bitterroot Valley Community College will implement a guided pathways approach in program planning and academic advising. The four major elements of the guided pathways approach for student success are: a) clarify paths to student end goals, b) help students choose and enter a pathway, c) help students stay on path, and d) ensure that students are learning.¹⁴ Employing the guided pathways model focuses Bitterroot Valley Community College on student workforce awareness and student program completion resulting in timely graduates with valued labor market credentials.

- *Technology / Learning Management System (LMS) plans*

There are a number of Learning Management Systems (LMS) marketed to higher education. Systems currently in use by Montana two-year campuses include *Canvas*, *D2L Brightspace*, and *Moodle*. Bitterroot Valley Community College will decide upon a LMS based on research of application features and pricing as well as consultation with OCHE and the State's other two-year units. It is also possible the instructional agreement made between Bitterroot Valley Community College and the agreeing institution will include access to the agreeing institution's LMS. If this were the case, then the new college's LMS expense would be incorporated into the compensation negotiated in the instructional agreement.

Other types of technology employed by higher education institutions to assist with student services management include recruitment software such as *Hobsons CRM* or *Slate*, advising services software such as *DegreeWorks*, *Navigate*, and *Starfish*, and disability services software such as *Accommodate*. Due to Bitterroot Valley Community College's relatively small initial student volume, such comprehensive management systems will not be immediately required for student services' success. When the new college reaches a critical student mass, these types of management systems will be researched and subscribed to as needed. Additionally, as with the LMS, it is possible that student services management software could be included in the instructional agreement negotiated between Bitterroot Valley Community College and the agreeing institution. Such software inclusion could be negotiated at the onset of the agreement or years into the agreement.

¹⁴ American Association of Community Colleges and Community College Research Center. (2018). What is the pathways model? Retrieved from https://www.pathwaysresources.org/wp-content/uploads/2018/04/PathwaysModelDescription_Final.pdf

Infrastructure – Facilities, Equipment, & Information Technology

The infrastructure plan for Bitterroot Valley Community College includes a short-term strategy and a long-range vision. In the immediate years following the organizing of the new college, the plan is to transition the existing infrastructure of Bitterroot College UM to function similarly for Bitterroot Valley Community College. The long-term infrastructure vision for the new college is to acquire land for the site of a permanent campus and buildout accordingly. In the short term, operational funds will be used to continue the existing operation. In the long term, a capital campaign will be developed and implemented to raise funds for securing a campus location and constructing and/or remodeling desired facilities.

- *Campus physical plant and buildings*

Bitterroot College UM currently negotiates an annual lease with the Hamilton School District for a 23,700 ft² former middle school located at 103 South 9th Street in Hamilton. Bitterroot Valley Community College plans to assume this existing lease arrangement and agreement. The building includes a 3,960 ft² common area/gym, five small lecture/seminar rooms, an art studio, a computer lab, a fabrication lab, a healthcare lab, a science lab, a student success center, a student reception area, a break/mail/copier space, a food service space, offices for up to 26 staff, men's and women's restrooms, and various janitorial, mechanical, IT, and storage space. The existing building is of sufficient assignable space to serve a college student population of approximately 200 FTE.¹⁵ Annual expenses for the property, based on present figures, are a \$70,000 lease payment, a \$30,000 utilities payment (gas, electricity, and water), and an \$18,000 connectivity payment. Unrestricted and designated operational funds will be used to pay the annual physical plant and building expenses. Notably, the building dates to 1963 and needs significant upgrades to its heating, ventilation, and air condition system and security system. For a college to continue operating in this space, whether it be Bitterroot College UM or Bitterroot Valley Community College, investments will likely need to be made in the short-term. Bitterroot Valley Community College will fund any immediately necessary facility improvements via designated fund revenue or donor contributions.

Regarding Bitterroot Valley Community College's potential need for short-term space associated with industrial trades programming (i.e., construction, welding), the new college will negotiate with area school districts for after-hour access to existing high school shop space. Bitterroot College UM successfully negotiated and maintained such an agreement with Hamilton School District in FY2015-2017 for a welding certificate of applied science program.¹⁶ Costs associated with such an agreement would be funded via a program fee paid by students.

With respect to a long-range physical plant and buildings' vision, one option would be for Bitterroot Valley Community College to negotiate a purchase of the existing leased space and its accompanying acreage (15.35 acres) from the Hamilton School District. This location could then be developed and kept in perpetuity as the permanent campus for Bitterroot Valley Community College. The campus would be within walking distance to the County's primary medical complex as well as the National Institutes of Health's Rocky Mountain Laboratories, Ravalli County government offices, and Hamilton's downtown business and retail district, allowing for accessible instructional

¹⁵ See *Bitterroot College Needs Assessment (2010)*, p. 45.

¹⁶ Program funded by the RevUp Grant (Federal Trade Adjustment Assistance Community College and Career Training Grant [TAACCCT] grant program).

partnerships with numerous local entities. Moreover, the campus would have convenient access to the Bitterroot River, allowing for accessible outdoor instructional activities associated with recreation and natural resources. Costs associated with acquiring and developing the land and initial facilities associated with a permanent campus would be funded by a capital campaign of approximately \$25 million.

- *Academic and administrative equipment*

Bitterroot Valley Community College will request an at-no-cost transfer of ownership of all existing Bitterroot College UM academic and administrative equipment from the University of Montana to the new college. Notably, the majority of current equipment at Bitterroot College UM was purchased or acquired through grants, donations, student fees, and one-time-only legislative funding, not via Bitterroot College's annual UM General Fund allocation. Additionally, nearly all the present college's office furnishings and much of its computer hardware are comprised of UM and State surplus inventory. With respect to costs associated with new equipment for a new or remodeled facility, expenses would be included in the associated capital campaign.

- *Enterprise information system*

Bitterroot Valley Community College's choice of an Enterprise Management System (EMS) could be affected by its instructional agreement with its accreditation partner college. If the terms of the agreement include administrative services, then Bitterroot Valley Community College will link to the partnering college's EMS. The expense associated with this linkage will be incorporated into the instructional agreement. If the terms of the agreement do not include administrative services, then the Bitterroot Valley Community College would research various EMS options while also consulting with OCHE regarding the State's requirements for the receipt of enterprise data (financial and student records). It is understood that all the State's public units of higher education excepting Flathead Valley Community College use Ellucian Banner for their EMS. Currently, Miles Community College and Dawson Community College each pay the UM approximately \$80,000 annually to be on UM's instance of Banner. One EMS route for Bitterroot Valley Community College would be to negotiate a like contract with the UM to be on its instance of Banner. Unrestricted funds would be used to pay for any annual EMS subscription cost.

Attachments

Attachment A. Bitterroot College Director memo to UM Provost, 2018.

To: Beverly Edmond, UM Provost

From: Victoria Clark, Director, Bitterroot College UM

Date: January 29, 2018

RE: Recommendations for Immediate Action per APASP: Bitterroot College

In order for the Bitterroot College to achieve its comprehensive two-year education mission in the service of the 40,000 residents of Ravalli County and as stated by the Montana University System, organizational/structural changes needed include the following:

- **Bitterroot College student and fiscal data need to be disaggregated from Missoula College.**
Data disaggregation allows for:
 - Evidence-based decision-making
 - Faculty and staff ownership of outcomes
 - A distinct Bitterroot College identity, critical for recruitment clarity, recruitment opportunity, and resource opportunity
- **Bitterroot College needs academic and student services authority akin to other UM colleges and/or MUS campuses.**
Academic and student services authority allows for:
 - Program and service development and delivery to be driven foremost by student and community needs
 - Faculty and staff vested in programming and support
- **Bitterroot College needs state allocation equity on par with Montana's other two-year units.**
State allocation funding equity allows for:
 - Program and service responsiveness expectations to be met
 - Faculty and staff commitment to unit

Options for immediate action for organizational/structural change which could provide a path for student and fiscal data disaggregation, academic and student services authority, and state allocation equity:

1. Bitterroot College becomes an official branch campus of the UM per Northwest Commission on Colleges and Universities (NWCCU)
2. Bitterroot College becomes an official campus of the University of Montana per MCA 20-25-201
3. Bitterroot College becomes a community college district per MCA 20-15-2

Comments on UM Provost's APASP Recommendations per Bitterroot College

- **Recommendation to place Bitterroot College under Missoula College**
 - Not permitted under current Montana Statute (MCA 20-25-21)
 - Only UM and MSU are permitted to have campuses
 - Does not address the three organizational/structural changes identified above which are needed for the Bitterroot College to achieve its comprehensive two-year education mission in Ravalli County and per the Montana University System two-year initiative
 - Does not appreciate that the scope of Bitterroot College responsibilities to its students and to Ravalli County are broader than the scope of Missoula College responsibilities to its students and to Missoula County. As a geographically distinct campus from the UM, the Bitterroot College addresses a host of academic, admissions, advising, facilities, programming, safety, security, and treasury issues through local partnerships and/or directly with the UM. Missoula College, due to its immediate proximity to the UM as well as Missoula County's approach to adult education programming, defers these issues to either the UM or Missoula County Public Schools. If Bitterroot College were put under the authority of Missoula College, Missoula College would be required to provide oversight for issues which are not under its own regular, operational purview.
 - Does not appreciate the real and perceived conflict of interest between Missoula College and Bitterroot College
 - Does not appreciate the correlation between local control and success
 - Political ramifications of this option with respect to the Bitterroot College Advisory Council, Ravalli County Commissioners, Ravalli County state legislative delegation, and Ravalli County voters should be understood before this option is exercised
- **Recommendation for Bitterroot College to remain a stand-alone affiliate**
 - Requires legislative approval as a UM campus in Hamilton would need to be added per MCA 20-25-201
 - "Substantial investment" assertion is not accompanied by data; a researched proposal for an autonomous campus which speaks to necessary costs and process is needed for an objective evaluation
 - Any "investment" required for an autonomous campus should be the state's responsibility not the UM's responsibility; the Bitterroot College should not remain an unfunded mandate of the UM
 - Independent accreditation is not required for a branch campus; autonomous campuses can also be under the accreditation umbrella of a separate institution



April 9, 2018

Paula Short, Director of Communications
Paul Kirgis, Acting Provost
University of Montana

Dear Director Short and Provost Kirgis,

The purpose of this letter is to communicate with UM Administration the Bitterroot College Advisory Council's preference for the Bitterroot College as a new Provost joins our community.

As Advisory Council to the Bitterroot College, our goal is to become an Affiliate Campus, per Montana Code, like the Butte, Dillon, and Helena campuses. With this organizational structure, the Bitterroot College administrative reporting line would be directly to the UM President.

Our goal allows for:

1. Academic and student services authority, including:
 - a. Program and service development and delivery to be driven by student and community needs. The priority in this outcome is to meaningfully respond to Ravalli County workforce development and adult education needs;
 - b. Faculty and staff conferred with the authority to develop programming in response to these needs and support value-added adult education opportunities.
2. State allocation equity commensurate with Montana's other two-year units, supporting:
 - a. Fiscal ability to meet program and service obligations to be responsive to community-based needs;
 - b. Appropriate faculty and staff to provide for these needs.
3. Student and fiscal data disaggregation specific to Bitterroot College, enabling:
 - a. Evidence-based decision-making,
 - b. Faculty and staff investment in outcomes,
 - c. Recruitment clarity, recruitment opportunity, and resources development,

In addition, at the request of the Advisory Council, Bitterroot College Director Victoria Clark has compiled a history of Unduplicated Student Headcount for the academic years 2015-2018 (enclosed). The Council requested these numbers because the College's attendance footprint is camouflaged within the Missoula College data. As a geographically distinct campus, Bitterroot College addresses a wide variety of academic, admissions, advising, facilities, programming, safety and security, and treasury responsibilities. As an Adult Education provider, the College must respond to Ravalli County residents' needs and interests. Local support and commitment for the Bitterroot College is strong and long-term in nature.

Ms. Short, as Director of Communications, we are requesting that our vision be shared broadly within the UM community and with our new Provost.

Sincerely,

Candy Lubansky
Chairperson, Bitterroot College Advisory Council

CC: President Bodnar, Director Clark, Provost Harbor

BITTERROOT COLLEGE UM
103 South 9th Street | Hamilton, MT 59840
406.375-0100 | FAX 406.375-0200 | www.umt.edu/bc

Regina Plettenberg
Ravalli County Elections Administrator
215 South 4th Street, Suite C
Hamilton, MT 59840



May 15, 2019

Dear Ms. Plettenberg,

On behalf of the Ravalli County Workforce Alliance—a Ravalli County citizen group advocating for the establishment of a local public community college— we are submitting, with this letter, a copy of our petition calling for an organization election of the Community College District of the Bitterroot Valley, Montana. The petition document responds to the relevant Montana statute (§ 20-15-201) showing that the proposed Community College District of the Bitterroot Valley, Montana meets statutory criteria. It is noted that the proposed Community College District of the Bitterroot Valley, Montana coincides with the boundaries of the following elementary school districts: Corvallis K-12 Schools, Darby K-12 Schools, Hamilton K-12 Schools, Lone Rock Elementary School, Pinesdale Elementary School, Stevensville Elementary School, and Victor K-12 Schools. The petition document identifies the number of signatures of registered electors needed to meet the statutory requirements, pursuant to § 20-15-202. Please note that the 20 % number required by law is calculated from the most recent certification of the number of eligible electors registered within the precincts comprising the proposed Community College District of the Bitterroot Valley, Montana.

In addition to the petition attachment are four other documents. One validates the number of public high school students regularly enrolled within the proposed community college district per Montana Office of Public Instruction, GEMS data warehouse. The second validates the tax value of the proposed community college district per the Montana Department of Revenue at Property.MT.gov. The third document, from the Ravalli County GIS Department, shows the legal boundary of the proposed community college district and how the boundary coincides with existing boundaries of contiguous elementary school districts, all of which are located in Ravalli County. Finally, the fourth document provides the number of registered electors within the proposed community college district as obtained from your office on April 16, 2019.

We would like to begin gathering signatures no later than July 15, 2019 and conclude on or before December 15, 2019. If you have any further questions or need further documentation, please do not hesitate to contact Candy Lubansky at the email address or phone number provided below. We look forward to hearing back from you following your review of our petition and supporting documentation.

Sincerely,

A handwritten signature in black ink, appearing to read 'Steve Grover'.

Steve Grover
Chair, Ravalli County Workforce Alliance
Managing Member, Bitterroot Gateway Development

A handwritten signature in black ink, appearing to read 'Candy Lubansky'.

Candy Lubansky
Ravalli County Workforce Alliance
406.370-5030 lubansky@msn.com

A handwritten signature in black ink, appearing to read 'Julie Foster'.

Julie Foster
Ravalli County Workforce Alliance
Executive Director, Ravalli County Economic Development Authority

Links to documents accompanying letter:

- [Final Petition](#)
- [Public High School Student Count](#)
- [Tax Value of Proposed District](#)
- [Legal Boundary of Proposed District](#)

Attachment D. Enrollment calculation detail.

FY2024 Projections

Faculty Department	Faculty FTE	Credits	Sections	Student FTE	
				Low Enrollment	High Enrollment
General Education					
Tenured	4.00	52	17	52	87
Adjunct	1.50	23	8	23	38
Business & Technology					
Tenured	1.00	13	4	7	9
Adjunct	1.00	15	5	8	10
Health Professions					
Tenured	1.00	13	4	9	12
Adjunct	0.50	8	3	5	7
Industrial Technology					
Tenured	2.00	26	9	12	17
Adjunct	0.50	8	3	4	5
Natural Resources/Ag					
Tenured	1.00	13	4	6	9
Adjunct	0.25	4	1	2	3
	12.75	173	58	127	195

FTE:Headcount Ratio

Campus 1:1.25

Dual Credit 1:3.00

Headcount

158 Campus Headcount

150 Dual Credit Headcount

308 Total Headcount

Assumptions

Tenured faculty teach 13 credits per semester

Adjunct faculty teach 15 credits per semester

All sections equal 3 credits

Low Enrollment is 15 students/section for General Education, 8 students/section for Business & Technology, 10 students/section Health,

High Enrollment is 25 students/section for General Education, 10 students/section for Business & Technology, 14 students/sections for Health,

Headcount total based on Low Enrollment assumption

Attachment E. Revenue calculation detail (two tables).

CURRENT UNRESTRICTED OPERATING ACCOUNT SUMMARY OF REVENUE DATA (TOTAL)			
UNIT NAME: BITTERROOT VALLEY COMMUNITY COLLEGE			
NAME OF FUND	FY2024 BUDGETED	PERCENT	
State Appropriation	\$ 1,092,250	47.9%	
Tuition & Fees			
Student Fees	\$ 94,913	4.2%	
In-District Tuition	\$ 431,918	18.9%	
Out of District Tuition	\$ -	0.0%	
Out of State Tuition	\$ -	0.0%	
WUE Tuition	\$ -	0.0%	
Total Tuition & Fees	\$ 526,830	23.1%	
Mandatory Levy (Local Support)			
Operational	\$ 439,107	19.2%	
Retirement	\$ 210,893	9.2%	
Total Mandatory Levy	\$ 650,000	28.5%	
Other	\$ 12,500	0.5%	
Total Revenues	\$ 2,281,580	100.0%	
			ACADEMIC YEAR
			23-24
MANDATORY TUITION AND FEES PER STUDENT (@ 15 credits)	Tuition	Fees	Total
In-District	\$2,850	\$750	\$3,600
Out of District	\$3,420	\$750	\$4,170
Out of State	\$7,695	\$750	\$8,445
WUE	\$5,985	\$750	\$6,735
Estimated value of one mill - Bitterroot Valley Community College District FY2024		\$73,401	
Percent of mandatory mill levy support		28.5%	

FY2024 Projections

State Allocation

Student Enrollment (FTE) Projection	Variable Cost of Education per Student FTE	Fixed Cost of Education ¹	State Percent Share	State Allocation	Percent Share
177	\$ 3,196	\$ 1,701,825	48.2%	\$ 1,092,250	47.9%

Student Tuition

Student Enrollment (FTE) Projection ²	Tuition/credit	No. of Semesters	Student Tuition Revenue	Percent Share
127	\$ 95.00	2	\$ 360,668	
50	\$ 47.50	2	\$ 71,250	
			\$ 431,918	18.9%

Student Fees

Student Enrollment (FTE) Projection	Mandatory Fees/credit	No. of Semesters	Student Fees Revenue	Percent Share
127	\$25	2	\$ 94,913	
Other Fees (application fee, orientation fee, course fees, program fee, etc.)			\$ 12,500	
			\$ 107,413	4.7%

Local Mills for College Programming

Revenue per Mill	Mill Revenue	Percent Share
\$ 73,401	5.98 <i>Operating</i>	\$ 439,107
\$ 73,401	2.87 <i>Retirement</i>	\$ 210,893
	8.86	\$ 650,000
		28.5%

Total Unrestricted Revenue \$ 2,281,580 100%

Mills:³ 8.86

Property Value	Taxpayer Cost
\$ 100,000	\$ 11.95
\$ 200,000	\$ 23.91
\$ 300,000	\$ 35.86

¹ Fixed Cost of Education is 75% of Operating Budget

² First row is regular students; second row is dual enrollment students

³ 1 Mill = \$1.35 per \$100,000 property value

Attachment F. Expenditure calculation detail (six tables).

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA - TOTAL		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: TOTAL BUDGETED UNRESTRICTED EXPENSES		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	12.75	45.2%
Contract Professional & Admin.	6.00	21.3%
Support Staff	7.95	28.2%
Other Employees (Workstudy)	1.50	5.3%
TOTAL FTE'S	28.20	100.0%
PERSONAL SERVICES:		
Contract Faculty	\$ 630,895	27.8%
Contract Professional & Admin.	\$ 342,500	15.1%
Support Staff	\$ 280,425	12.4%
Other Employees (Workstudy)	\$ 9,504	0.4%
Total Salaries	\$ 1,263,324	55.7%
Employee Benefits	\$ 605,276	26.7%
TOTAL PERSONAL SERVICES	\$ 1,868,600	82.3%
OPERATING EXPENSES:		
Contracted Services	\$ 237,500	10.5%
Supplies and Materials	\$ 26,500	1.2%
Communications	\$ 26,000	1.1%
Travel	\$ 12,000	0.5%
Rent	\$ 57,000	2.5%
Utilities	\$ 23,000	1.0%
Repair and Maintenance	\$ 5,000	0.2%
Other	\$ 3,000	0.1%
Total Operating Expenses	\$ 390,000	17.2%
Equipment and Capital	\$ 10,500	0.5%
Total Expenditures	\$ 2,269,100	100.0%
TOTAL EXPENDITURES BY OBJECT	\$ 2,269,100	100.0%
Recap by Program:		
Instruction	\$ 930,892	41.0%
Academic Support	\$ 218,442	9.6%
Student Services	\$ 309,703	13.6%
Institutional Support	\$ 652,116	28.7%
Operation and Maintenance of Plant	\$ 157,946	7.0%
TOTAL EXPENSES BY PROGRAM	\$ 2,269,100	100.0%

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: INSTRUCTION		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	12.75	96.2%
Contract Professional & Admin.	0.00	0.0%
Support Staff	0.25	1.9%
Other Employees (Workstudy)	0.25	1.9%
TOTAL FTE'S	13.25	100.0%
PERSONAL SERVICES:		
Contract Faculty	\$ 630,895	67.8%
Contract Professional & Admin.	\$ -	0.0%
Support Staff	\$ 4,800	0.5%
Other Employees (Workstudy)	\$ 1,267	0.1%
Total Salaries	\$ 636,962	68.4%
Employee Benefits	\$ 258,930	27.8%
TOTAL PERSONAL SERVICES	\$ 895,892	96.2%
OPERATING EXPENSES:		
Contracted Services ¹	\$ 20,000	2.1%
Supplies and Materials	\$ 10,000	1.1%
Communications	\$ -	0.0%
Travel	\$ 2,000	0.2%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ -	0.0%
Total Operating Expenses	\$ 32,000	3.4%
Equipment and Capital	\$ 3,000	0.3%
Total Expenditures	\$ 930,892	100.0%
TOTAL EXPENDITURES BY OBJECT	\$ 930,892	100.0%

¹ Includes Learning Management System (\$20,000)

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: ACADEMIC SUPPORT		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0.0%
Contract Professional & Admin.	1.50	50.8%
Support Staff	1.45	49.2%
Other Employees (Workstudy)	0.00	0.0%
TOTAL FTE'S	2.95	100.0%
PERSONAL SERVICES:		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ 78,750	36.1%
Support Staff	\$ 56,875	26.0%
Other Employees (Workstudy)	\$ -	0.0%
Total Salaries	\$ 135,625	62.1%
Employee Benefits	\$ 71,317	32.6%
TOTAL PERSONAL SERVICES	\$ 206,942	94.7%
OPERATING EXPENSES:		
Contracted Services ¹	\$ 5,000	2.3%
Supplies and Materials	\$ 3,000	1.4%
Communications	\$ -	0.0%
Travel	\$ 2,000	0.9%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ -	0.0%
Total Operating Expenses	\$ 10,000	4.6%
Equipment and Capital	\$ 1,500	0.7%
Total Expenditures	\$ 218,442	100.0%
TOTAL EXPENDITURES BY OBJECT	\$ 218,442	100.0%

¹ Includes Library Contract (\$5,000)

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: STUDENT SERVICES		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0.0%
Contract Professional & Admin.	0.50	9.5%
Support Staff	4.00	76.2%
Other Employees (Workstudy)	0.75	14.3%
TOTAL FTE'S	5.25	100.0%
PERSONAL SERVICES:		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ 26,250	8.5%
Support Staff	\$ 150,000	48.4%
Other Employees (Workstudy)	\$ 4,805	1.6%
Total Salaries	\$ 181,055	58.5%
Employee Benefits	\$ 108,649	35.1%
TOTAL PERSONAL SERVICES	\$ 289,703	93.5%
OPERATING EXPENSES:		
Contracted Services ¹	\$ 3,500	1.1%
Supplies and Materials	\$ 6,000	1.9%
Communications	\$ 6,000	1.9%
Travel	\$ 3,000	1.0%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ -	0.0%
Total Operating Expenses	\$ 18,500	6.0%
Equipment and Capital	\$ 1,500	0.5%
Total Expenditures	\$ 309,703	100.0%
TOTAL EXPENDITURES BY OBJECT	\$ 309,703	100.0%

¹ Includes Financial Aid Verification contract (\$3,500)

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: INSTITUTIONAL SUPPORT		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0.0%
Contract Professional & Admin.	4.00	72.7%
Support Staff	1.25	22.7%
Other Employees (Workstudy)	0.25	4.5%
TOTAL FTE'S	5.50	100.0%
PERSONAL SERVICES:		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ 237,500	36.4%
Support Staff	\$ 38,750	5.9%
Other Employees (Workstudy)	\$ 1,716	0.3%
Total Salaries	\$ 277,966	42.6%
Employee Benefits	\$ 144,150	22.1%
TOTAL PERSONAL SERVICES	\$ 422,116	64.7%
OPERATING EXPENSES:		
Contracted Services ¹	\$ 199,000	30.5%
Supplies and Materials	\$ 1,500	0.2%
Communications ²	\$ 20,000	3.1%
Travel	\$ 5,000	0.8%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ 3,000	0.5%
Total Operating Expenses	\$ 228,500	35.0%
Equipment and Capital	\$ 1,500	0.2%
Total Expenditures	\$ 652,116	100.0%
TOTAL EXPENDITURES BY OBJECT	\$ 652,116	100.0%

¹ Includes Enterprise Management System (\$80,000), Web Management System (\$7,500), MS Office Employee Licenses (\$300), Student Email Client (\$1,200), Accreditation Costs (\$50,000), and Liability/Property/Umbrella Insurance (\$50,000 [+ \$25,000 covered by Designated Funds])

² Includes Telephones (\$4,000), Copier (\$4,000), Data/Internet (\$12,000 [+ \$6,000 covered by Designated Funds])

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: OPERATION AND MAINTENANCE OF PLANT		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0%
Contract Professional & Admin.	0.00	0%
Support Staff	1.00	80%
Other Employees (Workstudy)	0.25	20%
TOTAL FTE'S	1.25	100%
PERSONAL SERVICES:		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ -	0.0%
Support Staff	\$ 30,000	19.0%
Other Employees (Workstudy)	\$ 1,716	1.1%
Total Salaries	\$ 31,716	20.1%
Employee Benefits	\$ 22,230	14.1%
TOTAL PERSONAL SERVICES	\$ 53,946	34.2%
OPERATING EXPENSES:		
Contracted Services	\$ 10,000	6.3%
Supplies and Materials	\$ 6,000	3.8%
Communications	\$ -	0.0%
Travel	\$ -	0.0%
Rent ¹	\$ 57,000	36.1%
Utilities ²	\$ 23,000	14.6%
Repair and Maintenance	\$ 5,000	3.2%
Other	\$ -	0.0%
Total Operating Expenses	\$ 101,000	63.9%
Equipment and Capital	\$ 3,000	1.9%
Total Expenditures	\$ 157,946	100.0%
TOTAL EXPENDITURES BY OBJECT	\$ 157,946	100.0%

¹ \$20,000 in rent covered by Designated Funds

² \$10,000 in utilities covered by Designated Funds

Attachment G. Staffing calculation detail.

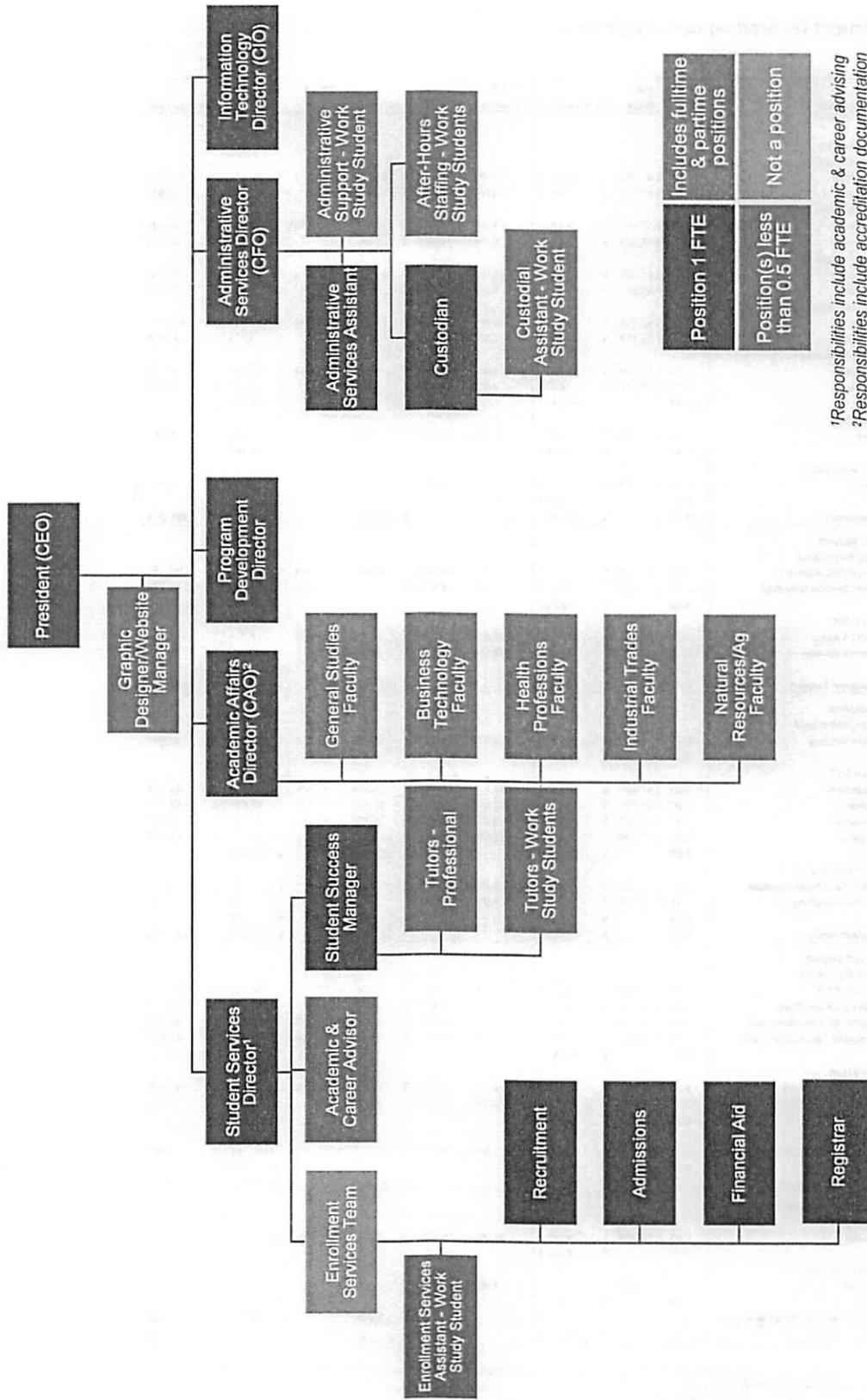
Personal Services	Base		Payroll			Health		Employee		Expense Total
	FTE	Wage Compensation	Deduct % ¹	Retire % ²	Retire \$	Insur ³	Benefits			
Instruction										
Contract Faculty										
General Education										
Tenured	4.00	\$ 50,000	\$ 200,000	6.0%	16.82%	\$ 33,640	\$ 50,592	\$ 96,132	\$	296,132
Adjunct	1.50	\$ 33,572	\$ 50,358	6.0%	16.82%	\$ 8,470	\$ -	\$ 11,467	\$	61,825
Business & Technology										
Tenured	1.00	\$ 57,500	\$ 57,500	6.0%	16.82%	\$ 9,672	\$ 12,648	\$ 25,741	\$	83,241
Adjunct	1.00	\$ 33,572	\$ 33,572	6.0%	16.82%	\$ 5,647	\$ -	\$ 7,644	\$	41,216
Health Professions										
Tenured	1.00	\$ 65,000	\$ 65,000	6.0%	16.82%	\$ 10,933	\$ 12,648	\$ 27,449	\$	92,449
Adjunct	0.50	\$ 33,572	\$ 16,786	6.0%	16.82%	\$ 2,823	\$ -	\$ 3,822	\$	20,608
Industrial Technology										
Tenured	2.00	\$ 62,500	\$ 125,000	6.0%	16.82%	\$ 21,025	\$ 25,296	\$ 53,759	\$	178,759
Adjunct	0.50	\$ 33,572	\$ 16,786	6.0%	16.82%	\$ 2,823	\$ -	\$ 3,822	\$	20,608
Natural Resources										
Tenured	1.00	\$ 57,500	\$ 57,500	6.0%	16.82%	\$ 9,672	\$ 12,648	\$ 25,741	\$	83,241
Adjunct	0.25	\$ 33,572	\$ 8,393	6.0%	16.82%	\$ 1,412	\$ -	\$ 1,911	\$	10,304
	12.75		\$ 630,895					\$ 257,487		
Classified Staff										
Tutors	0.25	\$ 19,200	\$ 4,800	12.5%	16.82%	\$ 807	\$ -	\$ 1,405	\$	6,205
	0.25		\$ 4,800					\$ 1,405		
Student Work Study										
Tutors	0.25	\$ 5,069	\$ 1,267	3.0%	0.00%	\$ -	\$ -	\$ 38	\$	1,305
	0.25		\$ 1,267					\$ 38		
Total Instruction	19.25		\$ 636,962			\$ 106,924		\$ 258,930		\$ 895,892
Academic Support										
Contract Professional										
Program Development	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$	80,515
Student Services (advising)	0.50	\$ 52,500	\$ 26,250	12.5%	16.82%	\$ 4,415	\$ 6,324	\$ 14,007	\$	40,257
	1.50		\$ 78,750					\$ 42,022		
Classified Staff										
Student Success	1.00	\$ 40,000	\$ 40,000	12.5%	16.82%	\$ 6,728	\$ 12,648	\$ 24,356	\$	64,356
Academic Advisor	0.45	\$ 37,500	\$ 16,875	12.5%	16.82%	\$ 2,838	\$ -	\$ 4,939	\$	21,814
	1.45		\$ 56,875					\$ 29,295		
Total Academic Support	2.95		\$ 135,625			\$22,612		\$ 73,317		\$ 205,942
Student Services										
Contract Professional										
Student Services	0.50	\$ 52,500	\$ 26,250	12.5%	16.82%	\$ 4,415	\$ 6,324	\$ 14,007	\$	40,257
	0.50		\$ 26,250					\$ 14,007		
Classified Staff										
Recruitment	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$	61,124
Registrar	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$	61,124
Financial Aid	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$	61,124
Admissions	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$	61,124
	4.00		\$ 150,000					\$ 94,497		
Student Work Study										
Enrollment Services Assistant	0.25	\$ 6,864	\$ 1,716	3.0%	0.00%	\$ 0	\$ -	\$ 51	\$	1,767
After-Hours Staffing	0.50	\$ 6,178	\$ 3,089	3.0%	0.00%	\$ 0	\$ -	\$ 93	\$	3,181
	0.75		\$ 4,805					\$ 144		
Total Student Services	8.25		\$ 181,055			\$29,645		\$ 109,649		\$ 289,703
Institutional Support										
Contract Professional										
President (CEO)	1.00	\$ 80,000	\$ 80,000	12.5%	16.82%	\$ 13,456	\$ 12,648	\$ 38,064	\$	116,064
Academic Affairs (CAO)	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$	80,515
Administrative Services (CFO)	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$	80,515
Information Technology (CIO)	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$	80,515
	4.00		\$ 237,500					\$ 120,108		
Classified Staff										
Administrative Services Assistant	1.00	\$ 30,000	\$ 30,000	12.5%	16.82%	\$ 5,046	\$ 12,648	\$ 21,429	\$	51,429
Graphic Designer/Website Manager	0.25	\$ 35,000	\$ 8,750	12.5%	16.82%	\$ 1,472	\$ -	\$ 2,561	\$	11,311
	1.25		\$ 38,750					\$ 23,990		
Student Work Study										
Administrative Support	0.15	\$ 6,864	\$ 1,716	3.0%	0.00%	\$ -	\$ -	\$ 51	\$	1,767
	0.25		\$ 1,716					\$ 51		
Total Institutional Support	9.50		\$ 277,966			\$ 46,465		\$ 144,150		\$ 422,116
Plant Operation/Maintenance										
Classified Staff										
Custodial	1.00	\$ 30,000	\$ 30,000	15.0%	16.82%	\$ 5,046	\$ 12,648	\$ 22,179	\$	52,179
	1.00		\$ 30,000					\$ 22,179		
Student Work Study										
Custodial	0.25	\$ 6,864	\$ 1,716	3.0%	0.00%	\$ -	\$ -	\$ 51	\$	1,767
	0.25		\$ 1,716					\$ 51		
Total Plant Operation/Maintenance	1.25		\$ 31,716			\$ 5,046		\$ 22,230		\$ 53,946
Total Personal Services	28.20		\$ 1,253,324			\$ 210,893		\$ 605,276		\$ 1,858,600

¹ Payroll Deductions: Unemployment 0.45%; Workers Comp 0.5% (high rate on 2% for Plant & Student Workers); SJA/Term Assessment 11.5% (Professional & Classified); SN (Faculty)

² Retirement: MORE 1.45%, GASDI 6.2%, PERK/715 8.17%

³ Health Insurance: MUS Health Insurance employer contribution is \$1054/month.

Attachment H. Organizational chart (for positions on Unrestricted Operating Account only).



Position 1 FTE	Includes fulltime & parttime positions
Position(s) less than 0.5 FTE	Not a position

¹Responsibilities include academic & career advising
 ²Responsibilities include accreditation documentation

Attachment I. Sample instructional contract.

**—SAMPLE—
INTERGOVERNMENTAL SERVICE AGREEMENT
BETWEEN
OREGON COMMUNITY COLLEGE
AND
PORTLAND COMMUNITY COLLEGE**

THIS INTERGOVERNMENTAL AGREEMENT, as authorized by ORS 190.010, is entered into on the date of last signature below, between Oregon Community College, hereinafter referred to as "OCC", and Portland Community College, hereinafter referred to as "PCC".

WHEREAS, OCC and PCC desire to cooperate in enabling OCC to provide instructional and administrative services to patrons of the OCC service area, and to do so without requiring PCC patrons to subsidize the operation of the OCC district.

THEREFORE, the parties agree as follows:

I. OCC agrees to:

Adhere to and to comply with all applicable federal and state laws, PCC Board policies, Northwest Commission on Colleges and Universities (NWCCU) standards, and PCC's academic policies and procedures. PCC will periodically monitor compliance with all applicable laws, standards, policies, and procedures.

Comply with all applicable Oregon and United States statutes governing the employment relationship including, but not limited to, the Americans with Disabilities Act, the Family Medical Leave Acts, and the Fair Labor Standards Act.

Be solely responsible for hiring, employing, supervising, evaluating, and compensating faculty and staff to provide instruction, student support, and administrative services. The recruitment and selection of faculty and staff at OCC must be in compliance with the "Uniform Guidelines on Employee Selection Procedures" jointly adopted by the U.S. EEOC and the Office of Federal Contract Compliance. PCC will not provide and will not bill OCC for any workers compensation coverage. PCC will monitor all hiring processes and supervision practices periodically. All faculty hired by OCC must meet the qualifications established by PCC which will review the qualifications of all faculty on a periodic basis.

Be solely responsible for processing grievances filed by their students, administrators, faculty, and staff, for handling discrimination and affirmative action complaints, and for addressing violations of any of the above referenced employment laws. OCC agrees to hold PCC harmless for any violations or resulting complaints or claims relative to this section. PCC assumes no liability for these actions and any services provided by PCC at OCC's request relative to these actions are not covered in the agreement.

Consult with PCC regarding all contracts that have been or are being developed to provide instruction or other services related to instruction or instructional support

services at OCC for example, but not limited to, credit instruction and advanced placement. Contracts to provide training services to business and industry are exempted from this provision.

Reimburse PCC for any other services not described in this agreement and agreed to by both parties in writing before the service is performed. Billing for additional services will be done on a quarterly basis by the PCC Financial Services Office with appropriate documentation to justify billings for all additional services.

II. PCC agrees to:

Provide the following comprehensive community college services to OCC in compliance with PCC Board policies and NWCCU accreditation standards.

A. ACADEMIC SERVICES:

process and approve all OCC's curricular changes and new programs following PCC procedures;

periodically review instructor files to assure they are qualified in the subject areas they teach and to review implementation of the credit instructor approval policy;

periodically review hiring and evaluative procedures to assure compliance with established PCC procedures;

provide course content guides, the approved textbook and materials lists and other up-to-date curriculum information;

review OCC's instructional approval and evaluation procedures according to NWCCU standards;

provide opportunities for OCC, upon mutual agreement, to confer with PCC faculty and administrators for the purpose of providing technical assistance;

provide opportunities for OCC staff to participate in Subject Area Committees (SAC's), attend Educational Advisory Committee (EAC) meetings, and participate in other committees relevant to the agreement such as assessment and accreditation.

B. ENROLLMENT SERVICES:

provide class schedule entry support;

maintain academic records for all OCC students attempting credit/CEU classes; provide transcript, transfer articulation, and related services;

provide financial aid services to OCC as described in the Financial Aid addendum to this agreement.

C. INSTITUTIONAL RESEARCH:

provide the programming for OCC to generate OCCURS and IPEDS data to prepare the reports OCC will submit to the Department of Community Colleges and Workforce Development.

D. LIBRARIES:

provide library support services as specified in the Library Services addendum

E. FINANCIAL SERVICES:

be responsible for billing OCC for services identified in paragraph VI and for all additional services in a timely manner;

provide appropriate documentation to justify billings for all additional services.

- III.** In return for services rendered under paragraph II of this agreement, OCC will pay PCC an overhead charge of (xx) percent based on OCC's actual, annual costs for its full-time and part-time faculty (salary and fringe benefit payments), plus (xx) percent indirect charge on the value of this agreement.
- IV.** Payments as identified in Paragraphs I and III will be made quarterly. Total payments to be made under this agreement as identified in the budget addendum will be estimated in advance each year, with adjustments to the estimate made on an annual basis. Final fiscal year billings for all costs will be provided no later than August 30.
- V.** The budget agreement shall be adjusted annually by negotiations between OCC and PCC. Any changes in the financial arrangement will be agreed upon by both parties by December 15 prior to the July 1 effective date. The financial arrangement identified in this agreement will be validated annually by submitting a budget for approval. Appropriate signatures on the budget document will be required for validation.
- VI.** The Vice President of Academic Services at PCC will have overall responsibility for administering this agreement and designating other staff, as needed, to carry out this agreement.
- VII.** The parties each agree to indemnify and hold harmless the other for any damages, disbursements, and attorney fees which may result from the party's actions or failures to act.
- VIII.** This agreement is intended to be continuous from year to year unless terminated in one of the following ways:
- A.** Either party may terminate this agreement effective at the start of the next fiscal year by at least six (6) months notice in writing.
- B.** The parties must agree annually in advance on all services and costs for each fiscal year. If they fail to agree, either party may give notice to terminate. During

the one hundred and eighty (180) day notice period, the agreement in effect for the ending fiscal year will be continued.

- C. If either party breaches this agreement, the other may terminate the agreement upon ninety (90) days written notice to the breaching party. This right is in addition to any other rights hereunder or by law.
 - D. By mutual agreement with mutually agreeable timelines.
- IX. The parties have entered into two addenda in conjunction with this Agreement, which are attached hereto and hereby incorporated by reference. The parties may agree on additional addenda provided that are reduced to writing and fully executed by both parties.
- X. Any amendment to this Agreement will not be effective unless reduced to writing and executed by both parties, except as otherwise provided in Paragraph V.

LIBRARY SERVICES ADDENDUM A

TO INTERGOVERNMENTAL SERVICE AGREEMENT BETWEEN OREGON COMMUNITY COLLEGE AND PORTLAND COMMUNITY COLLEGE

As an Addendum to their Intergovernmental Service Agreement and in further compliance with the standards of the Northwest Commission on Colleges and Universities (NWCCU), Portland Community College and Oregon Community College agree to provide the following:

Portland Community College will:

1. Provide access to the PCC library system via the Internet;
2. Loan PCC's print and media collection in a timely manner and for loan periods specified by LRC systems plus shipping periods;
3. Provide full library service to students and staff of OCC who come to any PCC library.

Oregon Community College will:

1. Designate a space and a contact person to receive and distribute loaned library materials;
2. Provide all necessary hardware and software applications needed to access the Internet including any special applications needed to access PCC library services such as telnet;
3. Pay for costs associated with interlibrary loans for all materials, rental costs for films from outside vendors, etc., by establishing an account with PCC's delivery service at the Sylvania Bookstore and pay for replacement costs for lost materials;
4. Initiate a planning process to provide library services for all students enrolled at Oregon Community College by acquiring a collection at OCC, which in ten years would generate normal community college library use (10 circulations per FTE per year). On an interim basis, until a permanent facility is available, develop contracts or participate in consortium agreements to provide quality library services to meet Northwest Accreditation Association standards.

FINANCIAL AID ADDENDUM B

TO INTERGOVERNMENTAL SERVICE AGREEMENT BETWEEN OREGON COMMUNITY COLLEGE AND PORTLAND COMMUNITY COLLEGE

As an Addendum to their Intergovernmental Service Agreement and in further compliance with the standards of the Northwest Commission on Colleges and Universities (NWCCU), Portland Community College and Oregon Community College agree to provide the following:

Portland Community College:

1. Establish and maintain all official financial aid records for OCC students.
2. Supply all financial aid related forms and documents.
3. Process all financial aid applications and related forms.
4. Perform file evaluation and analysis (needs analysis, data verification, student eligibility determination, professional judgment decisions) for all aid applicants.
5. Determine award eligibility and award amounts for all aid applicants.
6. Certify all loan applications.
7. Disburse and deliver financial aid according to PCC's disbursement schedule and federal cash management regulations.
8. Perform all federal refund/repayment calculations for students who withdraw or stop attending classes.
9. Bill OCC for federal refunds and direct expenses incurred by PCC on behalf of OCC.
10. Approve all Federal Work-Study contracts (PCC is the designated institution).
11. Approve all consortium agreements with other institutions (PCC is the home institution) for purposes of awarding financial aid for concurrent enrollment.
12. Monitor satisfactory academic progress for all financial aid students.
13. Adjudicate all satisfactory academic progress, time frame, and financial aid appeals.
14. Provide financial aid advising/counseling by phone or e-mail.

Note: OCC students are not eligible for PCC Institutional Grants, nor are they eligible to charge books (using financial aid) at the PCC Bookstore.

- 15. Provide OCC with copies of all appropriate financial aid policies, procedures, and related documentation.**
- 16. Provide financial aid training to OCC staff.**
- 17. Provide query access to appropriate Banner financial aid screens.**

Oregon Community College:

- 1. Disseminate financial aid information and forms to students and distribute financial aid checks to students.**
- 2. Act as liaison between students and financial aid advisors at PCC.**
- 3. Assist students in completing financial aid forms.**
- 4. Maintain logging system to track all forms and documents submitted to PCC.**
- 5. Conduct loan counseling (entrance and exit interviews) for all loan applicants according to PCC policies and federal regulations.**
- 6. Conduct Federal Work-Study orientation sessions and make job referrals according to PCC policies and procedures.**
- 7. Provide attendance verification and tuition account information to PCC for financial aid students who withdraw or stop attending classes by submitting the last date of attendance**
- 8. Access Banner financial aid screens through data link to assist students in determining financial aid status.**
- 9. Return all financial aid checks (aid canceled, student withdrawal, aid revision, etc.) according to PCC policies and federal cash management regulations.**
- 10. Conduct financial aid workshops for students and parents according to PCC policies and procedures.**
- 11. Attend OASFAA/OSSC financial aid training workshops.**
- 12. Attend PCC financial aid training sessions.**
- 13. Reduce or collect on OCC students who have been shown to be in default.**