

January 29, 2018

TO Nicole M. Cromwell, AICP, Zoning Coordinator and the County Review Development Committee

FROM The City of Billings' Heights Community Development Task Force, Roger Gravgaard Chair

RE: County Zone Change 687 – Planned Development – Barret Rd. Zoning change request from R-70 to RMF-R involving 10 acres fronting Barret Rd

POSITION: We believe this zone change is not in the best interest in the development of the City of Billings Heights and recommend rejection of this zone change.

ISSUES RAISED BY MEMBERS IN ATTENDANCE ON DECEMBER 26, 2017 AND/OR JANUARY 25, 2018

At both community meetings, Heights residents voiced strong opposition to the proposed zone change as evidenced by the questions asked and the applause to concerns raised. The December 25<sup>th</sup> meeting was more informative given that the project manager for the proposed development was present. The January 25<sup>th</sup> meeting was attended only by a representative from Performance Engineering who expressed that he was unable to answer questions about the proposed construction outside of "engineering."

1. Whether the new zoning will facilitate the adequate provision of transportation, water, sewerage, schools, parks and other public requirements.

RMF-R Residential Multi-Family – Restricted requires lots are to be served by public water and sewer services. The county has Heights County Water district. The existing land is in the county and does not have sewer. Performance Engineering staff have indicated that the plan is to seek a county zone change and then apply for annexation in the City of Billings. Sewer service is not provided to any County developed property in this area. Nicole Cromwell says "There are allowed uses in the RMF and RMF-R zone that could develop without access to public sewer services. The district description does not make it "unavailable" to those properties without current access to public water and sewer."

If the zone change does not require existing sewage services, is there adequate space on 10 acres to provide septic tanks for 100+ units? If the county approves the zone change, shouldn't the county verify that services can be provided? Currently, the county is being asked to approve a zone change that will require the city to provide services.

- School Capacity Pat Weber indicated at the December 26<sup>th</sup> meeting that the development in the Elysian School District had 107 units with 78 students (31 were high school). He anticipated that fewer children would rent as the plan was for more 1 bedroom, 1 bathroom units. Why are the developers targeting "young professionals" in an area adjacent to two schools?

Jerome McKibben, the demographer hired by SD predicted “School District 2 enrollment is expected to barely grow in the next decade, but elementary schools will see a slight decrease, according to updated enrollment projections.... The flip side is that high schools are expected to see an increase in enrollment.”

The Billings Public Schools, MT Demographic Study December 2017 predicts the following growth:

**Table 5: Elementary Enrollment (K-5), 2017, 2022, 2027**

	2017	2033	2017-2022 Change	2027	2022-2027 Change	2017-2027 Change
<b>BEARTOOTH</b>	385	418	8.6%	407	-2.6%	5.7%
<b>BENCH</b>	385	401	4.2%	379	5.5%	-1.6%
<b>BITTERROOT</b>	369	420	13.8%	391	-6.9%	6.0%
<b>DISTRICT TOTAL</b>	<b>7440</b>	<b>7468</b>	<b>.4%</b>	<b>7306</b>	<b>-2.2%</b>	<b>1.8%</b>

New schools always stimulate development. When Skyview was built, it was surrounded by bare land. Now there are new homes surrounding the school and new development continues.

When the school district purchased the land for Medicine Crow Middle School, the Satorie property was considered. Mike Satorie is now developing his family property and constructing single family homes. Development and pressure on the capacity of the schools in the Heights will continue; while fewer elementary students are predicted in the next decade in Billings Public Schools, the schools nearest to this development are projected to see an increase in students. Residents want to see development consistent with the existing neighborhood.

Medicine Crow Middle School had a 6-8 enrollment of 704; the projected 2019-2020 enrollment is 772, 6.7% increase. Skyview will experience a comparable growth in this period. Planners need to work cooperatively with the school district; residents expressed concern that there is limited additional capacity in Heights schools. Development does not increase available local tax dollars to schools.

2. Whether the new zoning will effect motorized and nonmotorized transportation;  
Traffic in Barrett Road

Medicine Crow Middle School has dramatically increased traffic and residents have expressed concern about pedestrian and bicycle safety. Adding 200+ cars which would more than double the current traffic on Barrett (not to mention construction traffic) with road improvements in a very limited area may result in loss of life (as it did in Lockwood).

The 2017 Billings Urbanized Area Traffic Count Map lists a 3 year average count of 620 cars per day on Barrett Road. This count undercounts the increase in traffic when Medicine Crow

Middle School opened in August 2016. Adding 100+ more units along a county road with sidewalks provided only on the south side for a portion of the street is a hazard to students, pedestrians, and existing residents.

The 2 attached photos show Barrett Road. No sidewalks will be provided for the majority of Barrett Road. Many children live east of the proposed development. Hundreds of additional vehicles can only increase vehicular hazards to school children walking along this narrow road. This will exacerbate an already hazardous situation.

Residents also noted that construction of Medicine Crow Middle School severely damaged the entire length of Barrett Road. The county has made minor repairs but the road is in worse condition than prior to construction. Construction of this development would add large vehicles to a small residential road, endangering children and further damaging the road.

(ATTACHMENTS: **Barrett Road sidewalk improvement**  
<http://billingsheights.com/barrett-road-sidewalk-improvement/>; **Billings residents discuss safety issues near new middle school** Posted: Jan 24, 2017 10:06 PM  
MST Updated: Jan 29, 2017 10:06 PM MST By Dustin Klemann - MTN News  
<http://www.ktvq.com/story/34339516/billings-residents-discuss-safety-issues-near-new-middle-school>; **Task force, local officials work to keep Medicine Crow kids safe to and from school** By MIKE FERGUSON [mferguson@billingsgazette.com](mailto:mferguson@billingsgazette.com) Jan 24, 2017  
[http://billingsgazette.com/news/local/government-and-politics/task-force-local-officials-work-to-keep-medicine-crow-kids/article\\_af5d7d8f-799d-5711-87e7-acb5f4b2a864.html](http://billingsgazette.com/news/local/government-and-politics/task-force-local-officials-work-to-keep-medicine-crow-kids/article_af5d7d8f-799d-5711-87e7-acb5f4b2a864.html))

3. Whether the new zoning will be compatible with urban growth in the vicinity of cities or towns.
  - Whether the new zoning considers the character of the district and the peculiar suitability of the property for particular uses;
  - Whether the new zoning will, as nearly as possible, be compatible with the zoning of nearby cities and towns.
  - Whether the new zoning will conserve the value of buildings

PLAN PRESENTED (see attached) The written plan presented by Performance Engineering and Consulting, Scott Aspenlieder at the January 25, 2018 meeting specifies a maximum density of 6 units per building x 10 units per acre x 10 acres for a total of 100 units (plus 2%). There was also discussion of purchasing 1 additional acre from the seller for a "greenspace". The current zoning allows 90 units. Verbal comments suggest the units would be 900-1000 square feet.

The explanation from Scott Aspenlieder is that there is only a marginal increase in the allowable density in the zone change. There are a number of reasons that it (the existing zone code) doesn't pencil out and they all have to do with the economics of development. There are economies of scale when you're building 4 and 6-plex buildings as opposed to duplexes that help drive down the cost of vertical construction. Secondly, the economics differ when you're talking about building and selling duplexes versus creating a rental property. "With the land priced as it is the numbers make it difficult to do as a duplex/twin home development. Let's not forget either that we're likely investing

\$300,000 or more in off-site improvements to Barrett Road and sidewalks along our frontage for the benefit of not just the development but the entire community. All of that impacts a development and its feasibility”.

The neighborhood is currently mixed agricultural and single family homes on ½ acre and acre lots (see attached list of homes & projected values from Spokeo). The average home on Barrett Road is valued at 3x the projected sale price by the developers (who we were told at the December 26<sup>th</sup> meeting plan to sell the units individually in 8 years).

Currently, Mike Satorie is developing Pumpkin Cove, single family homes contingent to the proposed development. This development is compatible with the nearby properties. The buy/sell for the proposed development is contingent upon the seller obtaining a zone change. The value of the property may be less for the existing zoning, but it is compatible with the existing neighborhood and does “pencil out” for developers with a different business model. Realtor.com lists 29 multi-family homes currently for sale in Billings.

Neighborhood Compatability A high density development is being proposed on a non-arterial street in a neighborhood of single family homes with no plan for a buffer zone. There are 10 adjacent acres and a zone change on this parcel may set a precedent for a zone change for the adjacent acres. Property owners expressed concern about the impact of property values given that the current neighborhood is single family homes (see attachment *Barrett Road existing houses*).

#### OTHER DEVELOPMENTS COMPLETED BY THE DEVELOPED AND REFERENCED DURING THE DECEMBER 26TH MEETING

- Green Meadow Helena LLC *Proposed annex of 20 acres still concerns city commission*  
AL KNAUBER Independent Record Sep 30, 2015  
[http://helenair.com/news/local/proposed-annex-of-acres-still-concerns-city-commission/article\\_c222186b-850d-5e88-afab-2ab85a0dcf50.html](http://helenair.com/news/local/proposed-annex-of-acres-still-concerns-city-commission/article_c222186b-850d-5e88-afab-2ab85a0dcf50.html)
- Grand Slam Patio Homes Grand Slam Patio Homes (406) 894-2102 | Happy Homes Apartments <https://www.happyhomesapartments.com/properties/grand-slam-patio-homes/>  
Grand Slam patio homes is a brand new 2017 construction off Elysian Rd and Mullowney Ln. This single level apartment community is a mile to the freeway for a quick commute anywhere in Billings. Scenic rural views with access to a community garden. Close to Costco, Yellowstone river with fishing and recreational ...

**ATTACHMENTS:**

**Community** #1-5 Sign in Sheets from January 25, 2018 meeting (5 pages); #6 Neighborhood feedback; #7 Barrett Road existing houses

**Traffic** #8 *Barrett Road sidewalk improvement*, #9 *Billings residents discuss safety issues near new middle school*; #10 *Task force, local officials work to keep Medicine Crow kids safe to and from school* By MIKE FERGUSON; #11 *2017 Billings Urbanized Area Traffic Count Map*; #12 *24 Traffic citations on Barrett road after community forum*; #13-14 photos of Barrett Road;

**Schools** #15 *Fewer elementary students, more high-schoolers expected for Billings schools in next decade* By MATT HOFFMAN mhoffman@billingsgazette.com Jan 23, 2018; #16 *Billings Public Schools, MT Demographic Study* December 2017;

**Other** #17 *Barrett Road Planned Development Agreement Summary* dated January 25, 2018;

January 25, 2018

***Barrett Road Planned Development Agreement Summary***

The Barrett Road Planned Development is set up for residential multi-family uses only. The goal of the development is to create a family friendly patio home development fitting with the surrounding area and providing access to new educational facilities in the area. The Planned Development will be completed such that it compliments adjacent neighborhoods and adds value to the community as a whole.

**Off-Site Improvements**

Below is a list of off-site improvements likely to be required by the City of Billings as part of the development:

- Barrett Road widening
- Sidewalk installation on Barrett Road
- Connection to Holling Drain Trail

**Prohibited Uses**

- Commercial retail stores
- Offices or professional buildings
- Bars, liquor stores or gaming/casinos
- Convenience stores
- Radio towers, broadcasting equipment, etc.

**Site Development Restrictions**

- Single story construction w/max height of 24-ft
- Maximum of 6 units per building
- Maximum density of 10 units per acre
- Signage either flat against a building or as part of architectural feature
- Outdoor lighting max 15-ft and fully shielded
- Minimum 20-ft green belt along all property boundaries w/1 tree per 25-ft
- One tree per two units in front yards
- All lawns irrigated and maintained
- Parking screened from Barrett Road and open spaces

Any comments or concerns can be submitted by written letters and mailed to Performance Engineering and Consulting at 7100 Commercial Ave., Ste. 4, Billings, MT 59101, attention Scott Aspenlieder, or emails may be sent to [scott@performance-ec.com](mailto:scott@performance-ec.com). We look forward to your continued participation.

Sign-In Sheet

January 25, 2018 Meeting

Name

Address/Zip

Mike & Jessica Rykowski	1129 Barrett Road 59105
Bob & Becky OWENS	2020 W Echo 59105
Ashley KALE	2015 W Echo Dr 59110
Nancya Barry Marsl	1808 Joyce St 59105
Anaue Withman	1024 Claremore Ln 59110
JOHN BOEHMKE	2020 ECHO DR.
H MARTENSON	832 KALE DR
DEE MARTENSON	832 KALE DR.
Casey Klein	<del>Cass</del> 1709 Cheryl
Lindsay & Bridger	McImpsey 1327 Bitterroot.
Jaimie Wilson	1252 Nasturtium Dr.
Jena Laughery	908 Rollman way
Brent Cumberley	235 Parkh. 11 Dr.

Sign-In Sheet	January 25, 2018 Meeting	Heights Community Development Task Force		
Name	Address/Zip	Email	Phone	
Rebecky & Colleen Boehm	838 Kale Dr	rboehm@hotmail.com		
Brittany Boehm	838 Kale Drive	Brittany.boehm@gmail.com		
Troy Rineberg	2050 Hawthorne Lane	troy.rineberg@gmail.com		
Kellee Pierce	1512 Hawthorne Ln	k.pierce@bessan.net		
STUART Kaufman	1447 Caryl ST.	stokast@gmail.com		
Michael Swarely	1115 Pumpkin Cove	mswarely14@gmail.com		
Nicole Brondino	1115 Pumpkin Cove	nibrondino2014@gmail.com		
Nicole Santonic	1880 Hawthorne Ln	SANTONIC@bessan.net		

Sign-In Sheet

January 25, 2018 Meeting

Name

Address/Zip

Wilma Alexander

2133 W Echo

Kernan Pfeiffer

2216 E Echo

Jim & Cheryl Hoover

2315 Columbine

Nancy Steel

931 Nutter Blvd

Terry Odegard

214 Lake Hill

Ron Kaminski

1205 Barrett Rd

Melanie Krenz

1205 Barrett Rd

Jason Lillie

Doug King

415 W Wicks Ln

Peggy Webb

1132 Ginger Ave.

Ashley Kelle

2015 W Echo

Dave + Heidi Christensen

1070 Claremore Ln.

Pam Ellis

2000 Outback Drive

Sign-In Sheet

January 25, 2018 Meeting

Name

Address/Zip

NEMOY OFFUTT

1543 CALEB CL.

Roger CRAIGHEAD

993 SIESTA 59105

Tom Zwickchen

1747 Wicks

DAW + Judy Quigley

2125 W. Echo Dr

AMELIA + JASON SCHIMMELZ

1919 NATALIE ST.

Danny Petty

2071 S ECHO DR

Chris + Lorraine Nielsen

1125 Barrett Rd

CHUCK BARTHOLY

300 EAST LAKE

Krystle Henry

2130 E. Echo

Tara Sether

1650 Brewington

Janet Grundel

1910 Bannack Dr.

DAVID WHITMORE

2106 W. ECHO DR

Clarence Brown

914 Mossman Ar.

Nedra Brown

"

Scott + Tammy McClellan

2011 Echo Dr

Sign-In Sheet

January 25, 2018 Meeting

Name

Address/Zip

Nikki Hofmann

900 Barrett Rd

Virgil Middendorf

1692 Natalie St

Angelika

2010 W. Elm

Dennis Kumpfner

1447 Gravel St

Roy Neese

rice chow

# Facebook comments and letters regarding Barrett Road received by Heights Task Force

28 December at 14:04

I don't think apartments are a good idea for that area. Homes - Okay. Apartments - No! The roads in the area will not support this.

**Jaima Wilson**

28 December at 16:23

Thank you for sharing. Because of the short notice and the timing of the meeting being directly after the holiday, I wasn't able to attend but my concerns mirror the concerns in these notes. My highest concern being the traffic on Barrett and safety of the children walking to and from school and the close proximity of these 100+ "young professional" dwellings to Medicine Crow. In my opinion this area is not suitable for apartments and/or duplexes and would greatly effect property values.

**Penny McDonald**

28 December at 15:43

Right, the one road that will be the most affected by this and they don't notify anyone because it's a private road. What a crock! Further more, they can't serve the owner of the road because he passed away last year. Satori Farms is all for it.. They are set up to receive his many millions with this sale? Barrett isn't set up for the new school list alone an apartment subdivision.

**Krystle Henry**

28 December at 16:17

Satori doesn't own the property sold it a while ago

**Krystle Henry** I am very concerned about traffic. That road cannot handle the New middle school as it is and exiting out onto Bench from Barret can be especially tricky with the parking along Bench. There is also a significant amount of children pedestrians that walk the streets especially when it snows. This is a picture of traffic today. I sat at Bench and Barrott along with many other cars trying to exit onto Bench.[Manage](#)



**Krystle Henry**



**Krystle Henry**



**Krystle Henry** Cars were lined up behind us.

**Krystle Henry** Yes, I am also concerned because we have to drive our son out of the district because they anticipated 28 in his kindergarten class. Multiple units in this school district isn't a good idea. They had class rooms in a closet when our kids were in the school.

**Dawn K. Ikener**

12 January at 20:42

A light & sidewalks all the way down the street. Terrible terrible idea!

**Dawn K. Ikener**

And the elementary schools are fairly full already

**Jaima Wilson**

12 January at 17:56

It would seem they changed their plans in a pretty quick fashion. Honestly, a little too quick. I'm familiar with land development just enough to know you don't go from a "young professional", 103 dwelling, high density apartment complex to suddenly a family friendly patio home environment in just a few weeks. Conveniently after the negative feedback from the entire community and neighborhood....

**Jaima Wilson**

12 January at 17:56

It would seem they changed their plans in a pretty quick fashion. Honestly, a little too quick. I'm familiar with land development just enough to know you don't go from a "young professional", 103 dwelling, high density apartment complex to suddenly a family friendly patio home environment in just a few weeks. Conveniently after the negative feedback from the entire community and neighborhood....

[anessa Alaina Ferguson](#) also replied to [Jaima Wilson](#)'s comment on [Heights Task Force's post](#).

**Vanessa Alaina Ferguson**

13 January at 11:09

Jaima Wilson that's exactly what I was thinking.

**Rebecca Weisser**

12 January at 17:27

how sad to see more housing instead of maybe a park

**Morgan Leeson**

12 January at 16:37

The area that was Sartoris Pumpkin patch!

[Morgan Leeson](#) also replied to [Alysia Rhianna Polak](#)'s comment on [Heights Task Force's post](#).

**Morgan Leeson**

13 January at 14:23

Probably a zoning requirement with widening both nearby roads to 34 ft across.

**Jaima Wilson**

15 January at 07:42

I've been wondering where they intend any of the kids in this new development to go to school also! The elementary schools are full

**Jaima Wilson**

15 January at 07:48

Does anyone know who will be responsible for the costs of widening the street? And also, is widening it going to be for sidewalks or for street parking? Or both?

## **Facebook comments regarding Preliminary Review of proposed zone change received by Heights Task Force**

**Krystle Henry Eric Henry Penny McDonald**



**Penny McDonald** Thanks!



**LuAnn Udall Rinebarger** Cant they do these after work hours?



**Penny McDonald** I agree. I will take the day off if it means that at all be heard



**LuAnn Udall Rinebarger** That's just very hard for some. I just can't get a reply to if people can't attend. I'd like to get that information to people!



**Penny McDonald** Do you think it's a ploy?



**LuAnn Udall Rinebarger** I think eventually people will get tired of all the meetings that don't have the people with the answers there



**Penny McDonald** Do you think that since we are county.... We won't matter?



**LuAnn Udall Rinebarger** I still think we need our opinion heard and to know what's going on. Daylon was almost hit two weeks ago

## Barrett Road zone change bad idea

Jan 20, 2018 [http://billingsgazette.com/opinion/letters/barrett-road-zone-change-bad-idea/article\\_e284e693-36ba-5f79-80c6-41b2d92223bb.html](http://billingsgazette.com/opinion/letters/barrett-road-zone-change-bad-idea/article_e284e693-36ba-5f79-80c6-41b2d92223bb.html)

The proposed 10-acre county zone-change request from Residential 7000 to Multi-Family Restricted, immediately southeast of Medicine Crow School along Barrett Road is a bad proposal. Residents in the surrounding area and those using Barrett Road and adjacent roads as a regular means of travel would be adversely impacted.

Instead of developing this land with the typical single-family home design consistent with R7000 criteria, a zone change to multi-family housing simply means a great deal more people concentrated on 10 acres using Barrett Road

as the only means of access, as well as major potential impacts to our local schools.

With the ultimate goal to annex this parcel into city limits, this would also impact many city services required to support a high-density community. Those who research the background of this developer will learn that a number of other problems (crime) associated with their past projects can be predicted and can only have a negative effect on our surrounding community.

As many of you already know, Barrett Road is a disaster during school and work commute hours. Compounding traffic with more vehicles entering and leaving this potential development defies any logic. The traffic issues (i.e. congestion, speeding and pedestrian safety) have never been completely mitigated.

Two meetings are planned, one at Medicine Crow Middle School at 7 p.m. on Thursday and another at 3:30 p.m. on Feb. 5, at the Planning and Community Department downtown.

**Chris Nielsen**

**Billings**

## **Proposed Zoning Change Off Barrett Rd**

Inbox x



**Josh Blotkamp**

to cromwelln

I will not be able to attend the meeting on January 25th in regards to the proposed zoning change. I am writing to let you know that I am against this zoning change. There are already traffic and pedestrian safety issues on Barrett and other area roads. A housing development of this density in this location is a bad idea. It would already make a bad situation worse, not to mention the impact to the schools in the area.

I also believe a this proposed zone change and it's subsequent development would have an adverse impact on property owners in all surrounding neighborhoods. Both to the property values, and increased stress on city utilities and resources.

Thank you

**From:** [zurbuchen@bresnan.net](mailto:zurbuchen@bresnan.net) [mailto:[zurbuchen@bresnan.net](mailto:zurbuchen@bresnan.net)]  
**Sent:** Friday, January 26, 2018 1:04 PM  
**To:** Cromwell, Nicole <[CromwellN@ci.billings.mt.us](mailto:CromwellN@ci.billings.mt.us)>  
**Cc:** '[scott@performance-ec.com](mailto:scott@performance-ec.com)' <[scott@performance-ec.com](mailto:scott@performance-ec.com)>  
**Subject:** Zone Change 687 Barrett Road

I have concern about zone change #687 on Barrett Road;

1) Going to Thursday's meeting at Medicine Crow I say no ZONE CHANGE signs on the property. I drove by in daylight Friday and no posting of a zone change was visible. To be correct does not there need to be a sign? I would hate to see this denied on such a technicality. **No Zoning Application sign is posted until the PD is finalized and the Public Hearing notice is published and mailed to surrounding property owners. We have not yet entered this phase of the process.**

2) At Thursday's meeting at Medicine Crow there was confusing information. All previous paperwork listed the area at 10.00 acres but they had a large display that showed 10.39 acres. This needs clarity and the Planned Development Agreement needs the correct value to be proper. **The application was submitted as the "north 10 acres of C/S 840, Parcel 1 Corrected". If materials are presented with additional area, this will need to be corrected before the Legal Notices are sent out and the description corrected in the PD agreement.**

3) The Planned Development Agreement must have a maximum density number listed. This is extremely important in that as presented that number is 100 or 103 depending on where it is written. With no number in the Planned Development Agreement one must use maximum density from the restrictions listed as largest multi-family unit being 6 and code saying a 6 plex requires 13,00 square feet of land, 10.00 acres equals 33 6 plexus or 198 living units and 10.39 acres equals 34 6 plexus or 204 living units. This huge difference will make a huge difference in the results of a traffic study causing the developer traffic mitigation to be hugely different than 100 or 103 living units traffic study would require. **I believe this is being contemplated by the applicant.**

4) The planned Development Agreement must show the internal street width and require a hard surface. The streets are reported to be private so this is probably the best way to insure pavement and adequate width. **I believe this is under consideration as well by the applicant.**

Once these are in the Planned Development Agreement I hope a presentation will highlight the fact that the zone change is really only responsible for the small increase in density that results, not the entire 100 or 103 development. As currently zoned the 10.00 acres zoned R 7,000 could have 45 duplexes or 90 living units (10.39 acres allows 47 duplexes or 94 living units) Making additional density relatively minute. While traffic is always a concern, the zone change cannot be held responsible for all the traffic from the development but just the increase. The remaining Planned Development Agreement is well written and contains good restrictions and

will ensure a nice development. This development will ensure Barrett Road see improvement which is sorely needed!

Tom Zurbuchen

From: [zurbuchen@bresnan.net](mailto:zurbuchen@bresnan.net) [mailto:[zurbuchen@bresnan.net](mailto:zurbuchen@bresnan.net)]

Sent: Friday, January 26, 2018 1:04 PM

To: Cromwell, Nicole <[CromwellN@ci.billings.mt.us](mailto:CromwellN@ci.billings.mt.us)>

Cc: '[scott@performance-ec.com](mailto:scott@performance-ec.com)' <[scott@performance-ec.com](mailto:scott@performance-ec.com)>

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be held responsible for all the traffic from the development but just the increase. The remaining Planned Development Agreement is well written and contains good restrictions and will ensure a nice development. This development will ensure Barrett Road see improvement which is sorely needed!

Tom Zurbuchen

**Christopher Nielsen**

to Nicole, me, Roger, Lorraine

1. The Developer/Property Owner must be required to demonstrate that a high density project as proposed will not have adverse impacts with traffic on Barrett, Bench and Hawthorne roads. A Traffic Study paid for by the Developer/Owner must be required in advance to determine potential impacts to the elementary, middle school and surrounding community who must use these roads on a daily basis. Failure to do so can only have negative consequences on an indefinite basis to all stakeholders.
2. An environmental assessment (EA) must be performed in advance to identify any potential health hazards resulting from major disturbances/ excavations to the property. The history of the property has been primarily agriculture where decades of pesticides, herbicides, and heavy metals may be present and once disturbed pose significant health and environmental hazards to the surrounding community. Mitigation alternatives must be disclosed in advance if laboratory analysis reveals any health or environmental issues/hazards on the property. An independent environmental contractor without interest in the property must be utilized.
3. The Developer/Owner must be required to accept responsibility for all damages to Barrett, Hawthorne, and Bench Roads resulting from heavy equipment traffic using these roads to develop any approved project on this property.
4. The Developer/Owner must demonstrate that the ground water table will not be impacted by a high density development project. Restrictions/ requirements on the use of all groundwater must be specified for any approved development.
5. Specific requirements for snow removal off any sidewalks the Developer constructs must be specified. This must not become a taxpayer responsibility.
6. The Developer/Owner must provide in advance any proposed ingress/egress roads accessing this property. This must include any signage such as street signs, stop signs, etc. This must be included in advance as "actuals" in the design specifications for public review and comment.
7. The Developer/Owner must specify actual locations and types of buffers/ green zones surrounding the proposed development site. This must include: types of fencing, trees, plants, types of environmental friendly lighting, noise pollution controls, and any security related measures not mentioned.
8. The Developer/Owner must disclose the intended purpose of any remaining lands (the other 10 acres) if owned by this developer/property owner. This includes any land adjacent to the proposed 10-11 acre site but not included in this project. This must be disclosed in advance so public decision makers and surrounding property owners have the opportunity to provide any comments or concerns with future impacts.

1. 9. The scope of the Developer/Owner proposed project is unprecedented for the surrounding area. It is inconsistent with the entire surrounding area developments. There is a reason for this. High density congested living conditions for residents who purchased homes in the east Heights who value home ownership and enjoy a certain quality of life did not purchase their property to have it devalued with high density rental duplexes. This project must be disapproved by decision makers to protect the interests of all homeowners who pay County and City property taxes, value their property, and their quality of life.

10. According to the Developer's representative, over 100 duplex units would be constructed on the property. Assuming rental units average 2 or more residents who work and drive daily, this would increase road usage on Barrett Road with 200 or more vehicles on an on-going basis. This is a conservative estimate not counting all of the potential visitors and guests of tenants living in the duplexes. All of these vehicles would ingress and egress Barrett Road at any given time. The traffic impacts to the elementary and middle school locations as well as Bench, Hawthorne and the remaining portion of Barrett Road would be significant and defies all logic to allow approval for this kind of project.

11. Pedestrian safety for our school children and residents is presently a major safety concern. To date there have been no successful resolutions in addressing traffic hazards. The current high volume of vehicular traffic on Barrett, Bench and Hawthorne roads has now reached epic proportions. Adding hundreds of more vehicles to this problem is irresponsible and dangerous for all pedestrians and bicyclists who use Barrett and Hawthorne Roads on a regular basis. Adding a sidewalk in front of the proposed development will do nothing to reduce congested traffic problems overall. Most of Barrett Road is in the County and a great deal of school children live east of the proposed development site. Pedestrians who live east of the proposed site will continue to be at risk and more so with the increased volume of traffic caused by this type of development should it be approved.

12. The property owned by Mr. Schulz and Developer should not receive County approval to develop any type of high density projects. This is foolish and irresponsible to allow any kind of development that creates increased traffic safety hazards to our children, pets and adults. Our surrounding area cannot accommodate develop of this extreme. It is reckless to ignore the obvious and deliberately inherit new problems that should never be created. This type of project will create identified and unidentified problems for certain.

13. Our bike path is a highly valued and used public area for pedestrians, pet owners and bicyclists. The quality and experience of the bike path is predicated upon the amount of usage at any given time. Congestion on the bike path caused by high density housing will destroy the ascetics and overall experience for those who presently live in the surrounding area and use the pathway regularly. It's assumed that use of the bike path by tenants in the development would exponentially increase bike trail usage near the two schools. This assumes that many more pet owners, pedestrians and bicyclists would be accessing the trail in the immediate area. The experience and quality of the bike path significantly diminishes as high use increases in congested areas. Nobody enjoys a crowd in one place. Not in our backyard.

14. It is incumbent upon the City-County Planning Division to determine the following:

If the proposed high density development is in accordance with the County and City's Growth Policy; 2. Whether the proposed new zoning promotes compatible urban growth in the surrounding area; 3. Whether the proposed new zoning is the most appropriate use of the land. Based on this criteria it is more than obvious that the proposed development doesn't fit into the neighborhood design whatsoever.

County Commissioners and City Planners must discern how growth proposals will affect our community. A Cost of Service Study is necessary for determining how this proposed development will

affect the local tax base and the cost of providing public services, such as street maintenance, bike path, police and fire protection. Billings has used similar studies for years on water and sewer service rates. The Developer should pay for this study.

15. Billings citizens deserve to know how growth will affect County and City finances since the surrounding area is mixed in both County and City jurisdictions. Reliable data will ensure that citizen costs are being shared equitably. This is imperative for the long term and not based on short meeting presentations. The County and City are responsible to its citizens for providing adequate information on the following:

1. How the predicted property tax return of high density residential use development or other type of development compares to the cost of serving the development;
2. How development patterns and the way services are funded affect actual cost distribution across the community;
3. Whether police and fire service levels are adequate now and what will be needed in the future with development and growth patterns;
4. How any level of development, particularly high density development will affect local school enrollment both currently and in the future.

Submitted by:

Chris Nielsen  
1125 Barrett Rd.  
Billings, MT 59105

406-850-1287



February 19, 2018

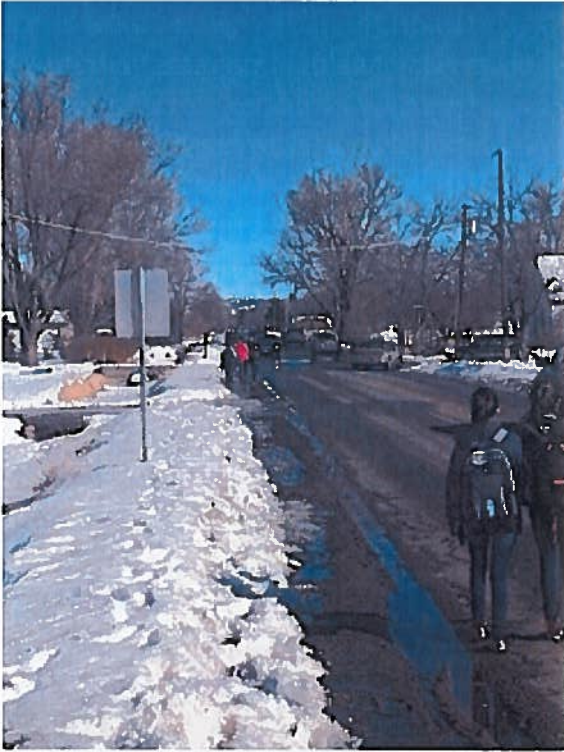
These photos document the present conditions and hazards on Hawthorne Rd. The contractor is snow plowing and leaving large amounts of snow on both sides of the road making it most difficult for vehicles to drive by one another, yet alone creating an extremely hazardous condition for all pedestrians using this road. There are no safe clearances on this extremely narrow road.

The number of vehicles using Hawthorne Rd as a crossroad to avoid using Barrett Road has exponentially increased because of the huge amount of school traffic in the morning and afternoon. Hawthorne Rd is due east of the proposed Barrett Road project which would potentially add hundreds of more vehicles using both Barrett and Hawthorne roads. Both roads are already significantly impacted with traffic congestion. Without significant road improvements along the entire traffic corridors, the probability of an impending miscue is likely. Comments and photos are submitted for the record.

Submitted by:

Chris Nielsen  
1125 Barrett Road  
Billings, MT 59105

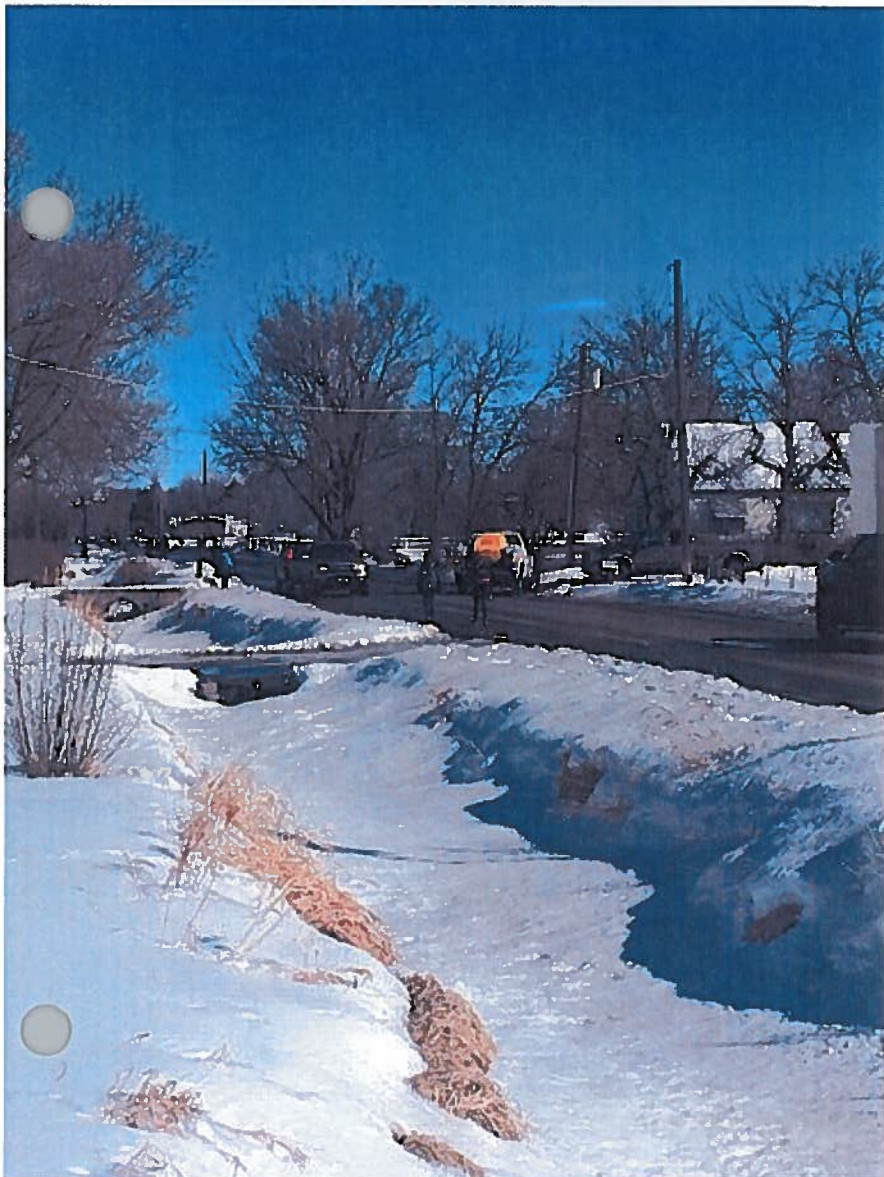




These pictures were taken on Barrett Road near the Hawthorne Road intersection. These pictures document a random number of school children walking home just east of the proposed Barrett Road high density land development proposal. The children are all east and well beyond the location where the property developer has proposed to install a 510' sidewalk on the south side of Barrett Road.

Obviously, a south side sidewalk serves little purpose since most children live east of the proposed development site. Snow, rain and mud will always be an issue along the edges of most of Barrett and all of Hawthorne Roads. The children walk on the roads to avoid deep snow and getting their feet wet and muddy. Barrett and Hawthorne roads experience many snow and rain days. Potentially adding hundreds of more vehicles on these arterial roads can only have a negative effect and increase the likelihood of an unwanted consequence.

Submitted by: Chris Nielsen 1125 Barrett Road  
Billings, MT 59105 406-850-1287





## After School Picture

Heights Task Force x

**Christopher Nielsen**  
to me

This picture documents the safety issues on Barrett Road east of the proposed development. No sidewalks will be provided for the majority of Barrett Road. Many children live east of the proposed development. Hundreds of additional vehicles can only increase vehicular hazards to school children walking along this narrow road. This will exacerbate an already hazardous situation. The children are walking on the road because of melting snow and mud.



[HTTPS://WWW.SPOKEO.COM/BARRETT+RD+BILLINGS+MT+ADDRESSES](https://www.spokeo.com/barrett+rd+billings+mt+addresses)

ADDRESS

**1342 Barrett Rd  
Billings, MT 59105**

DETAILS

Single Family House

RESIDENTS

17 residents

ADDRESS

**1404 Barrett Rd  
Billings, MT 59105**

DETAILS

4 Beds / 2 Baths  
1,184 sqft  
Single Family House  
Built in 1971  
Value: \$223K

RESIDENTS

13 residents

ADDRESS

**1435 Barrett Rd  
Billings, MT 59105**

DETAILS

4 Beds / 3 Baths  
1,430 sqft  
Single Family House  
Built in 1971  
Value: \$311K

RESIDENTS

2 residents

ADDRESS

**1439 Barrett Rd  
Billings, MT 59105**

DETAILS

Single Family House

RESIDENTS

9 residents

ADDRESS

**1704 Barrett Rd  
Billings, MT 59105**

DETAILS

2 Beds / 3 Baths  
1,242 sqft  
Single Family House  
Built in 1967  
Value: \$210K

RESIDENTS

5 residents

ADDRESS

**1706 Barrett Rd  
Billings, MT 59105**

DETAILS

3 Beds / 3 Baths  
1,308 sqft  
Single Family House  
Built in 1993  
Value: \$275K

RESIDENTS

3 residents

ADDRESS

**1724 Barrett Rd  
Billings, MT 59105**

DETAILS

3 Beds / 2 Baths  
2,100 sqft  
Single Family House  
Built in 1994  
Value: \$354K

RESIDENTS

15 residents

ADDRESS

**1732 Barrett Rd  
Billings, MT 59105**

DETAILS

5 Beds / 2 Baths  
1,344 sqft  
Single Family House  
Built in 1965  
Value: \$265K

RESIDENTS 7 residents

ADDRESS

**1744 Barrett Rd  
Billings, MT 59105**

DETAILS

Single Family House

RESIDENTS

3 residents

ADDRESS

**1820 Barrett Rd  
Billings, MT 59105**

ADDRESS

**1832 1/2 Barrett Rd  
Billings, MT 59105**

DETAILS

Single Family House

RESIDENTS

1 resident

ADDRESS

**1832 Barrett Rd  
Billings, MT 59105**

DETAILS

4 Beds / 4 Baths  
2,500 sqft  
Single Family House  
Built in 1979  
Value: \$366K

RESIDENTS

10 residents

ADDRESS

**1906 Barrett Rd  
Billings, MT 59105**

DETAILS

4 Beds / 2 Baths  
1,782 sqft  
Single Family House  
Value: \$278K

RESIDENTS

2 residents

DETAILS

2,190 sqft  
Single Family House  
Built in 1998  
Value: \$296K

RESIDENTS

4 residents

INCLUDES

ADDRESS

**1909 Barrett Rd  
Billings, MT 59105**

DETAILS

Single Family House  
Value: \$315K

RESIDENTS

1 resident

ADDRESS

**1918 Barrett Rd  
Billings, MT 59105**

DETAILS

5 Beds / 3 Baths  
1,652 sqft  
Single Family House  
Built in 1982  
Value: \$288K

RESIDENTS

12 residents

ADDRESS

**1930 Barrett Rd  
Billings, MT 59105**

DETAILS

3 Beds / 3 Baths  
1,356 sqft  
Single Family House  
Built in 1977  
Value: \$240K

RESIDENTS

3 residents

ADDRESS

**1937 Barrett Rd  
Billings, MT 59105**

DETAILS

3 Beds / 2 Baths  
2,111 sqft  
Single Family House  
Value: \$287K

RESIDENTS

5 residents

ADDRESS

**1942 Barrett Rd  
Billings, MT 59105**

DETAILS

4 Beds / 2 Baths  
1,236 sqft  
Single Family House  
Built in 1977  
Value: \$250K

RESIDENTS

6 residents

ADDRESS

**1947 Barrett Rd  
Billings, MT 59105**

DETAILS

4 Beds / 3 Baths  
1,748 sqft  
Single Family House  
Built in 1968  
Value: \$325K

RESIDENTS

13 residents

**2005 Barrett Rd  
Billings, MT 59105**

DETAILS

Single Family House  
Value: \$243K

RESIDENTS

19 residents

ADDRESS

**2011 Barrett Rd  
Billings, MT 59105**

DETAILS

5 Beds / 4 Baths  
1,669 sqft  
Single Family House  
Built in 1994  
Value: \$320K

RESIDENTS

5 residents

**2015 Barrett Rd  
Billings, MT 59105**

DETAILS

3 Beds / 2 Baths  
1,559 sqft  
Single Family House  
Built in 2009  
Value: \$340K

RESIDENTS

2 residents

ADDRESS

**2020 Barrett Rd  
Billings, MT 59105**

DETAILS

2 Beds / 3 Baths  
3,537 sqft  
Single Family House  
Value: \$584K

RESIDENTS

6 residents

# Barrett Road sidewalk improvement

<http://billingsheights.com/barrett-road-sidewalk-improvement/>



Excellent attendance at the community forum on Barrett Road Pedestrian Safety. There were nearly 100 people there.

One of the challenges is the fact that Barrett Road is 80% County and 20% City. Putting a sidewalk from the bike path to Hawthone is along the county portion of the road. The county does not have funds for such a project. They expect property owners served by the project to pay for its installation and maintenance. In this case, the burden would fall on two property owners south of Barrett Road. The irrigation ditch to the north of the road prevents property owners to the north from being asked to pay for the project, because they cannot directly access the sidewalk.

City also usually requires property owners to pay for sidewalks installed along their property. The city could install the sidewalk, but they could not charge the two property owners, so other funding needs to be found. It could be that the city is not allowed to build sidewalks out of city boundaries.

Residents in the area could petition the city and the county to implement an SID and RSID, respectively. It could be done over an area East of Bench or over the boundaries of Medicine Crow Middle School (although that would include the area that covers the Independent School District). This would require a vote by affected residents to raise their property taxes for this purpose.

Funds for the project could also be raised privately. There were other ideas that could be implemented in the interim. Ideas include a three way stop

at Barrett Rd and Hawthorne. Train students to walk on one side of the road and on the side of the road facing oncoming traffic. Train students to wear visible clothing when it is dark. Implement a lower school zone speed limit. Encourage the police department to enforce speed limit before and after the school day.

# Billings residents discuss safety issues near new middle school

Posted: Jan 24, 2017 10:06 PM MST Updated: Jan 29, 2017 10:06 PM MST

By Dustin Klemann - MTN News <http://www.ktvq.com/story/34339516/billings-residents-discuss-safety-issues-near-new-middle-school>



Pedestrians along Barrett Road (MTN News Photo)

BILLINGS -

Barrett Road in the Billings Heights near the new Medicine Crow Middle School is under the spotlight for safety issues.

On Tuesday, dozens of parents and city and county leaders met to discuss improvements to the road.

"Our number one priority is safety. I want to stress to everyone here this is public service," said Angela Cimmino, city council member representing the Heights.

Among the laundry list of ideas, parents want a sidewalk. But that request will require a petition to create a Special Improvement District (SID) at the county level.

"The issue is dollars and cents and money," said Yellowstone County Commissioner John Ostlund. "So we have to decide how to raise the money."

Among the solution of creating an SID, the city will extend the nearby Kyle Road to allow a passage to the east without using Barrett.

Still, students who are within three miles of the school are not able to use the bus system to get home.

Several parents raised the issue of vehicle speed, which is a 25 mph zone.

The city estimates 430 vehicle trips are made per day along the road. Due to its narrow width, 12 feet per lane, the city will request police assign traffic detail to enforce the speed limit.

Tuesday's meeting also highlighted the effort SD2 is working on with the soon-to-be opened Ben Steele Middle School on the West End.

"The city's really stepped up," said Lew Anderson, SD2's bond manager. SD2 is committing \$700,000 in sidewalks that will be made from Rimrock Road to Grand including a signal at 54th Street West. A hawk signal for pedestrians will be created at 58th Street West.

## **Task force, local officials work to keep Medicine Crow kids safe to and from school**

By MIKE FERGUSON [mferguson@billingsgazette.com](mailto:mferguson@billingsgazette.com) Jan 24, 2017

[http://billingsgazette.com/news/local/government-and-politics/task-force-local-officials-work-to-keep-medicine-crow-kids/article\\_af5d7d8f-799d-5711-87e7-acb5f4b2a864.html](http://billingsgazette.com/news/local/government-and-politics/task-force-local-officials-work-to-keep-medicine-crow-kids/article_af5d7d8f-799d-5711-87e7-acb5f4b2a864.html)

Heights Task Force members with safety concerns over their children walking along Barrett Road to and from Medicine Crow Middle School huddled with county, city and School District 2 officials Tuesday to brainstorm solutions to the roadway's lack of sidewalks.

Constructing sidewalks would require a pot of money the county road department doesn't have, Yellowstone County Commission Chair John Ostlund told the 50 or so people in attendance at the middle school, at 900 Barrett Road.

"It's a stretch to manage the budget we have," Ostlund said, noting that the department has 30 employees and a \$9 million budget to take care of about 1,600 miles of county roads. "You're going to have to decide how to raise the money or put in a (Special Improvement District)."

The SID is probably the quickest solution, Billings City Administrator Tina Volek told task force members.

Complicating the matter along Barrett Road is the fact that the county owns and maintains 80 percent of the roadway while the City of Billings owns and maintains 20 percent.

Dave Mumford, Billings' public works director, said in an email that there's one fix on the way that will help students who live south of Barrett Road.

The department is developing what Mumford called “a small project for next summer” to complete a small section of Kyhl Lane south of the school and then install a culvert and path over the Holland Drain. That will get those students walking or biking to school to the Kiwanis Trail east of the school, which would get students directly to the school.

“That project is admirable,” said Jason Lille, Heights Task Force chair.

But many students walking or biking to the new middle school from their homes north of Barrett Road must still negotiate the trip to and from school without sidewalks.

“This is going to take a lot of coordination,” said County Commissioner Denis Pitman. “We understand the frustrations. What are the solutions?”

Tim Miller, the county’s public works director, said residents could go the route that Lockwood residents did, creating, with the county commissioners’ help, a safety district, taxing themselves to help pay for sidewalk construction and, where necessary, right-of-way acquisition.

“It’s something for you to consider,” Miller said.

Some parents suggested additional stop signs could help slow traffic near the new school. Stop signs, Volek said, can be erected only after a traffic study warrants their installation.

Lille said he was happy that school, county and city officials “have taken this to heart, realizing there is concern here on the part of Heights citizens. We’ve got a beautiful new school which has increased pedestrian and vehicle traffic on Barrett Road.”

Lew Anderson, the bond manager for Billings Public Schools, said that \$700,000 in bond funds has been spent on making routes to Billings schools safer, and plans aided by city efforts are in place to make the route to Ben Steele Middle School in the West End, which opens at the start of the 2017-18 school year, as safe as possible.

Many more students than anticipated are now riding their bikes to Medicine Crow Middle School, Anderson said.

“We put out the normal number of bike racks, but after the first week we realized we were short,” Anderson said, so additional bike racks were put in place.

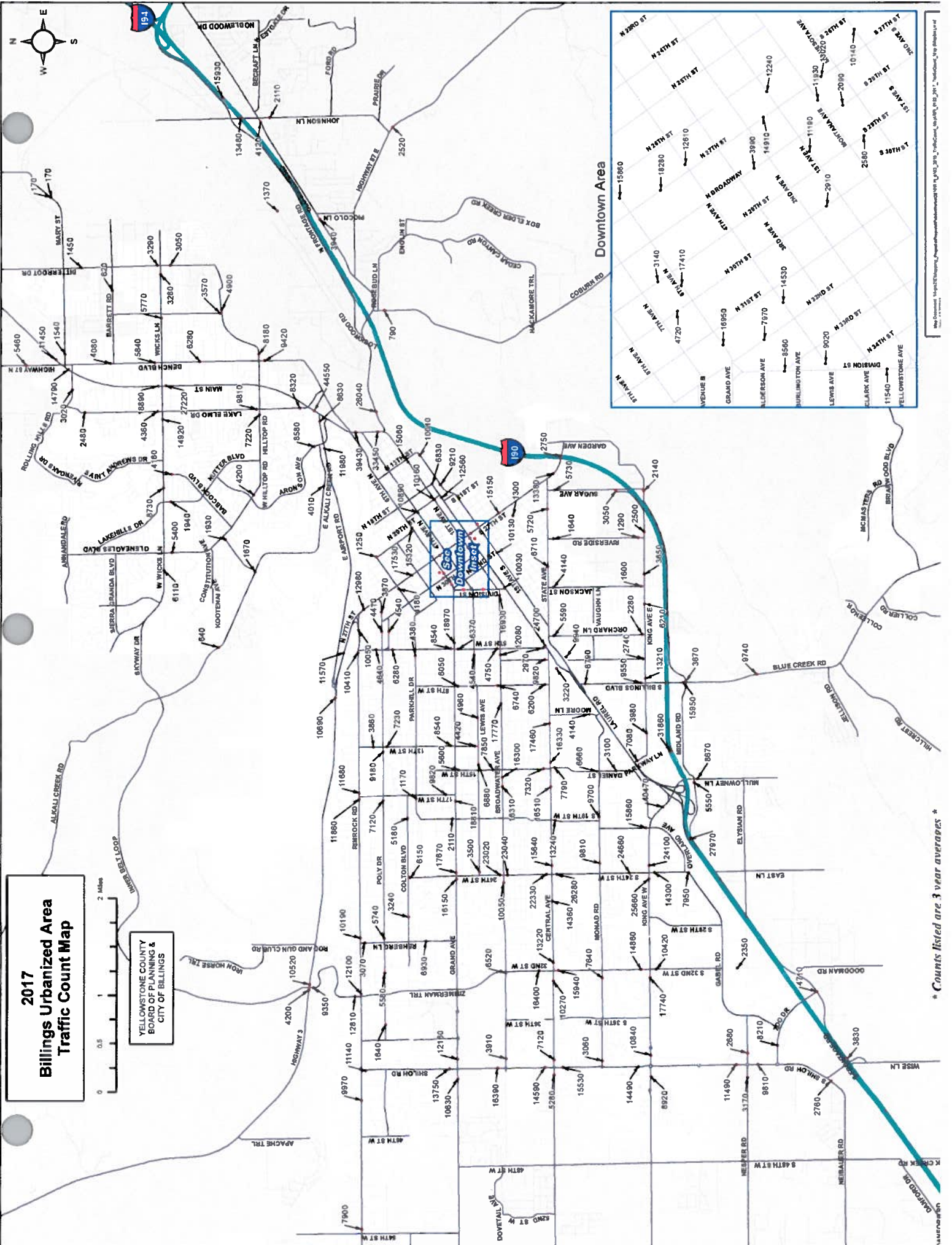
Two Billings City Council members who represent the Heights, Angela Cimmino and Larry Brewster, were present at the task force meeting.

“Our number one priority is public safety,” Cimmino told the group. “This isn’t lip service — it’s public service.”

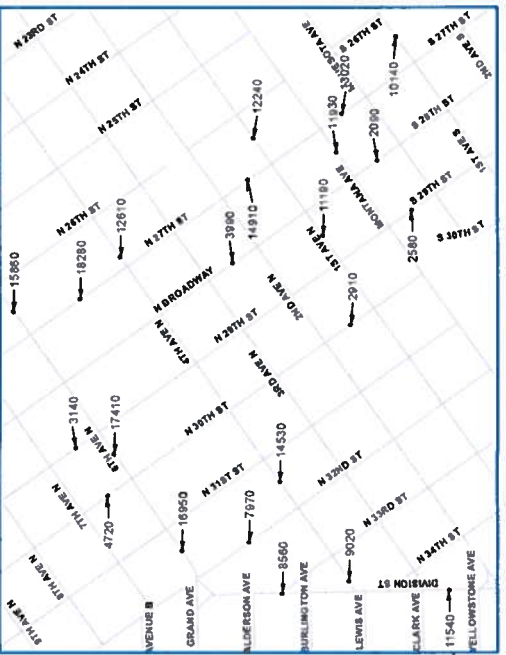
# 2017 Billings Urbanized Area Traffic Count Map



YELLOWSTONE COUNTY  
BOARD OF PLANNING &  
CITY OF BILLINGS



## Downtown Area



\* Counts listed are 3 year averages \*

## 24 Traffic citations on Barrett road after community forum



24 traffic citations issued on Barrett road after community forum on safe access to Medicine Crow Middle School.

<http://billingsheights.com/24-traffic-citations-issued-barrett-road/>

Update from our Heights City Council representative Angela Cimmino. As promised at the Heights Task Force meeting last Thursday night. I contacted our Chief of Police and requested a speed trailer at Medicine Crow Middle School. The Chief immediately responded. He coordinated two STEP (Selective Traffic Enforcement Program) officers, Inde and Gilmore, to enforce traffic this past Monday at the school. The 25 mph speed limit on Barrett Road enforcement produced 24 citations and warnings. The citations involved speed, cell phone and right-of-way violations. Traffic enforcement will continue as time permits.

## Fewer elementary students, more high-schoolers expected for Billings schools in next decade

- By MATT HOFFMAN [mhoffman@billingsgazette.com](mailto:mhoffman@billingsgazette.com) Jan 23, 2018

[http://billingsgazette.com/news/local/fewer-elementary-students-more-high-schoolers-expected-for-billings-schools/article\\_d8677cca-25bb-5763-915c-90fa4a56349d.html](http://billingsgazette.com/news/local/fewer-elementary-students-more-high-schoolers-expected-for-billings-schools/article_d8677cca-25bb-5763-915c-90fa4a56349d.html)

School District 2 enrollment is expected to barely grow in the next decade, but elementary schools will see a slight decrease, according to updated enrollment projections.

The companies that prepared both the update and original report, Cropper GIS and Mckibben Demographics, first created enrollment projections for SD2 in 2012.

“You’re actually at the elementary level hitting kind of a plateau,” said demographer Jerome McKibben.

The flip side is that high schools are expected to see an increase in enrollment.

This update shaves down K-12 expectations for growth by the 2027-28 school year by about 200 students compared to the original report, but is still about 400 students more than are currently enrolled.

Projections come with a whole shaker of salt. Birth rates, trends for people moving in and out of the area, home values, and the strength of the local economy must remain stable. And they assume that Lockwood won’t vote to expand from a K-8 to K-12 school district, which will [likely be on the May ballot](#).

The report predicts significant school-to-school variability. For example, Central Heights Elementary’s enrollment would drop 17 percent using current school boundaries; Arrowhead Elementary’s enrollment would increase 15 percent.

Overall, elementary enrollment is expected to drop 1.8 percent; middle school is expected to increase 2.7 percent; high school is expected to increase 8.3 percent.

Part of the high school increase is driven by expected growth in K-8 districts, like Elder Grove, whose students attend SD2 high schools.

The report has been a major driver of district policy in the past; the original version played a starring role in the 2012 bond campaign that funded two new middle schools and districtwide elementary renovations.

But K-8 enrollment fell well short of initial projections, and McKibben revised the projections to reflect current enrollment.

“The wave of kids is actually still there, they’re just not in your schools,” McKibben told trustees in 2014.

Instead, they headed to outlying districts. Both Laurel and Elder Grove have experienced explosive enrollment growth, and projections commissioned by those districts expect the trend to continue.

District officials are eyeing high school facilities plans. While a new high school is likely off the table, a push for renovations — [especially at the Career Center](#) — seems likely.

Enrollment at Skyview and West High is expected to grow by about 300 students over the next decade. Senior High’s enrollment is expected to shrink by about 150 students.

“You have a wave aging in, and your feeder districts have a wave aging in as well,” McKibben said. “That’s the line I have the most confidence in.”

He also addressed recent facilities growth from the 2012 bond.

“You have barely caught up,” he said, citing 90 percent of capacity as an ideal operating figure.

SD2's state accreditation was threatened by overcrowded classrooms before the bond.

"Actually I think it's kind of a gift that enrollment's not going up at a steep rate," said SD2 superintendent Terry Bouck.

McKibben highlighted high school growth as the most pressing issue, suggesting that high school boundaries should be redrawn in the next decade based on the uneven growth between high schools.

"The bigger problem is, 'do you have space for 500 more kids in the high schools?'" McKibben said.



# **Billings Public Schools, MT Demographic Study**

**December 2017**

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Executive Summary

1. The resident total fertility rate for the Billings Public Schools over the life of the forecasts is below replacement level. (2.04 versus replacement level of 2.1)
2. Most non-college in-migration to the district continues to occur in the 0-to-4 and 25-to-39 year-old age groups.
3. The local 18-to-24 year-old population continues to leave the district, going to college or moving to other urbanized areas. This population group accounts for the largest segment of the service area's out-migration flow. The second largest out-migration flow is the 30-to-44 year-old population moving to suburban areas.
4. The primary factors causing the district's enrollment to decline after 2024 are the large cohorts leaving after 12<sup>th</sup> grade and an increase in the number of empty nest households.
5. Changes in year-to-year enrollment (until the 2022-23 school year) will primarily be due to larger grade cohorts entering and moving through the school system in conjunction with smaller grade cohorts leaving the system.
6. The elementary enrollment will have a slight decline after the 2022-23 school year. This is due primarily to the fact that the rising 5<sup>th</sup> grade cohort will be greater than 1,250 in size.
7. The median age of the population will increase from 37.5 in 2010 to 38.7 in 2025. This is a large increase for a major urbanized area.
8. Even as the district continues to have a sustained level of new home construction, particularly compared to the 2001-2008 time period; the rate, magnitude and price of existing home sales will become the increasingly dominant factors affecting the amount of population and enrollment change.
9. Total enrollment is forecasted to increase by 464 students, or 2.8%, between 2017-18 and 2022-23. Total enrollment will decrease by 46 students, or -0.3%, from 2022-23 to 2027-28.

## INTRODUCTION

By demographic principle, distinctions are made between projections and forecasts. A projection extrapolates the past (and present) into the future with little or no attempt to take into account any factors that may impact the extrapolation (e.g., changes in fertility rates, housing patterns or migration patterns) while a forecast results when a projection is modified by reasoning to take into account the aforementioned factors.

To maximize the use of this study as a planning tool, the ultimate goal is not simply to project the past into the future, but rather to assess various factors' impact on the future. A variety of factors influence the future population and enrollment changes of each school district. Not all factors will influence the entire school district at the same level. Some may affect different areas at dissimilar magnitudes and rates causing changes at varying points of time within the same district. The forecaster's judgment, based on a thorough and intimate study of the district, has been used to modify the demographic trends and factors to more accurately predict likely changes. Therefore, strictly speaking, this study is a forecast, not a projection; and the amount of modification of the demographic trends varies between different areas of the district as well as within the timeframe of the forecast.

To calculate population forecasts of any type, particularly for smaller populations such as a school district, realistic suppositions must be made as to what the future will bring in terms of age specific fertility rates and residents' demographic behavior at certain points of the life course. The demographic history of the school district and its interplay with the social and economic history of the area is the starting point and basis of most of these suppositions particularly on key factors such as the age structure of the area. The unique nature of each district's and attendance area's demographic composition and rate of change over time must be assessed and understood to be factors throughout the life of the forecast series. Moreover, no two populations, particularly at the school district and attendance area level, have exactly the same characteristics.

The manifest purpose of these forecasts is to ascertain the demographic factors that will ultimately influence the enrollment levels in the district's schools. There are of course, other non-demographic factors that affect enrollment levels over time. These factors include, but are not limited to: transfer policies within the district, student transfers to and from neighboring districts, placement of "special programs" within school facilities that may serve students from outside the attendance area, state or federal mandates that dictate the movement of students from one facility to another (No Child Left Behind was an excellent example of this factor), the development of charter schools in the district, the prevalence of home schooling in the area, and the dynamics of local private schools.

Unless the district specifically requests the calculation of forecasts that reflect the effects of changes in these non-demographic factors (such as state policy changes or economic

changes for example), their influences are held constant for the life of the forecasts. Again, the main function of these forecasts is to determine what impact demographic changes will have on future enrollment. It is quite possible to calculate special "scenario" forecasts to measure the impact of school policy modifications as well as planned economic or facility changes. However in this case the results of these population and enrollment forecast are meant to represent the most likely scenario for changes over the next 10 years in the district and its attendance areas.

The first part of the report will examine the assumptions made in calculating the population forecasts for the Billings Public Schools. Since the results of the population forecasts drive the subsequent enrollment forecasts, the assumptions listed in this section are paramount to understanding the area's demographic dynamics. The remainder of the report is an explanation and analysis of the district's population forecasts and how they will shape the district's grade level enrollment forecasts.

## DATA

The data used for the forecasts come from a variety of sources. The Billings Public Schools provided enrollments by grade and attendance center for the school years 2015-2016 to 2017-18. Birth and death data for the years 2000 through 2015 were obtained from the Montana Department of Health. The net migration values were calculated using Internal Revenue Service migration reports for the years 2000 through 2016. The data used for the calculation of migration models came from the United States Bureau of the Census, 2005 to 2010, and the models were designed using demographic and economic factors. The base age-sex population counts used are from the results of the 2010 Census.

Recently the Census Bureau began releasing annual estimates of demographic variables at the block group and tract level from the American Community Survey (ACS). There has been wide scale reporting of these results in the national, state and local media. However, due to the methodological problems the Census Bureau is experiencing with their estimates derived from ACS data, particularly in areas with a population of less than 60,000, the results of the ACS are not used in these forecasts. For example, given the sampling framework used by the Census Bureau, each year only 1,400 of the over 45,000 current households in the district would have been included. For comparison 6,600 households in the district were included in the sample for the long form questionnaire in the 2000 Census. As a result of this small sample size, the ACS survey result from the last 5 years must be aggregated to produce the tract and block group estimates.

To develop the population forecast models, past migration patterns, current age specific fertility patterns, the magnitude and dynamics of the gross migration, the age specific mortality trends, the distribution of the population by age and sex, the rate and type of existing housing unit sales, and future housing unit construction are considered to be primary variables. In addition, the change in household size

relative to the age structure of the forecast area was addressed. While there was a slight drop in the average household size in the Billings Public Schools as well as most other areas of the state during the previous 20 years, the rate of this decline has been forecasted to slow over the next ten years.

## ASSUMPTIONS

For these forecasts, the mortality probabilities are held constant at the levels calculated for the year 2010. While the number of deaths in an area are impacted by and will change given the proportion of the local population over age 65, in the absence of an extraordinary event such as a natural disaster or a breakthrough in the treatment of heart disease, death rates rarely move rapidly in any direction, particularly at the school district or attendance area level. Thus, significant changes are not foreseen in district's mortality rates between now and the year 2027. Any increases forecasted in the number of deaths will be due primarily to the general aging of the district's population and specifically to the increase in the number of residents aged 65 and older.

Similarly, fertility rates are assumed to stay fairly constant for the life of the forecasts. Like mortality rates, age specific fertility rates rarely change quickly or dramatically, particularly in small areas. Even with the recently reported rise in the fertility rates of the United States, overall fertility rates have stayed within a 10% range for most of the last 40 years. In fact, the vast majority of year to year change in an area's number of births is due to changes in the number of women in child bearing ages (particularly ages 20-to-29) rather than any fluctuation in an area's fertility rate.

The resident total fertility rate (TFR), the average number of births a woman will have while living in the school district during her lifetime, is estimated to be 2.04 for the total district for the ten years of the population forecasts. A TFR of 2.1 births per woman is considered to be the theoretical "replacement level" of fertility necessary for a population to remain constant in the absence of in-migration. Therefore, in the absence of any migration into or out of the district, fertility alone would not be sufficient to maintain the current level of population and enrollment within the Billings Public Schools over the course of the forecast period.

A close examination of data for the Billings Public Schools has shown the age specific pattern of the non-college net migration will be nearly constant throughout the life of the forecasts. While the number of in and out migrants has changed in past years for the Billings Public Schools (and will change again over the next 10 years), the basic age pattern of the migrants has stayed nearly the same over the last 30 years. Based on the analysis of data it is safe to assume this age specific migration trend will remain unchanged into the future. This pattern of migration shows that the largest of the local out-migration occurring in the 18-to-24 year-old age group as young adults leave the area to go to college or move to other urbanized areas. A second group of out-migrants are those householders aged 30-to-44 years old that move to the outlying suburban areas. Most of the non-college local in-migration

occurs in the 0-to-4 and 20-to-29 age groups (the bulk of the which come from areas within 150 miles of the Billings Public Schools) primarily consisting of younger adults and their children.

As Yellowstone County is not currently contemplating any major expansions or contractions, the forecasts also assume that the current economic, political, social, and environmental factors, as well as the transportation and public works infrastructure (with a few notable exceptions) of the Billings Public Schools and its attendance areas will remain the same through the year 2027. Below is a list of assumptions and issues that are specific to the Billings Public Schools. These issues have been used to modify the population forecast models to more accurately predict the impact of these factors on each area's population change. Specifically, the forecasts for the Billings Public Schools assume that throughout the study period:

- a. The national, state or regional economy does not go into deep recession at any time during the 10 years of the forecasts; (Deep recession is defined as four consecutive quarters where the GDP contracts greater than 1% per quarter)
- b. Interest rates have reached a historic low and will not fluctuate more than one percentage point in the short term; the interest rate for a 30 year fixed home mortgage stays below 5.0%;
- c. The rate of mortgage approval stays at 1999-2003 levels and lenders do not return to "sub-prime" mortgage practices;
- d. There are no additional restrictions placed on home mortgage lenders or additional bankruptcies of major credit providers;
- e. The rate of housing foreclosures does not exceed 125% of the 2005-2007 average of Yellowstone County for any year in the forecasts;
- f. All currently platted and approved housing developments are built out and completed by 2026. All housing units constructed are occupied by 2027;
- g. The unemployment rate for Yellowstone County will remain below 7.5% for the 10 years of the forecasts;
- h. The rate of students transferring in to and out of the Billings Public Schools will remain at the 2013-14 to 2017-18 average;
- i. No additional private or charter school opens in the district over the next 10 years;
- j. The Lockwood School District doesn't become a K-12 district anytime in the next 10 years;
- k. No existing private or charter school closes in the district over the next 10 years;
- l. The State of Montana does not change the current policies on school vouchers or open enrollment over the next 10 years;
- m. The inflation rate for gasoline will stay below 5% per year for the 10 years of the forecasts;
- n. There will be no building moratorium within the district;

- o. Businesses within the district and the Billings Public Schools area will remain viable;
- p. The number of existing home sales in the district that are a result of "distress sales" (homes worth less than the current mortgage value) will not exceed 20% of total homes sales in the district for any given year;
- q. Housing turnover rates (sale of existing homes in the district) will remain at their current levels. The majority of existing home sales are made by home owners over the age of 60;
- r. Private school and home school attendance rates will remain constant;
- s. The rate of foreclosures for commercial property remains at the 2004-2008 average for Yellowstone County;

If a major employer in the district or in the greater Billings Metropolitan Area closes, reduces, or expands its operations, the population forecasts would need to be adjusted to reflect the changes brought about by the change in economic and employment conditions. The same holds true for any type of natural disaster, major change in the local infrastructure (e.g., highway construction, water and sewer expansion, changes in zoning regulations etc.), a further economic downturn, any additional weakness in the housing market or any instance, or situation that causes rapid and dramatic population changes that could not be foreseen at the time the forecasts were calculated.

The high proportion of high school graduates from the Billings Public Schools that attend college or move to urban areas outside of the district for employment is a significant demographic factor. Their departure is a major reason for the extremely high out-migration in the 18-to-24 age group, and was taken into account when calculating these forecasts. The out-migration of graduating high school seniors is expected to continue over the period of the forecasts and the rate of out-migration has been forecasted to remain the same over the life of the forecast series.

Finally, all demographic trends (i.e., births, deaths, and migration) are assumed to be linear in nature and annualized over the forecast period. For example, if 1,000 births are forecasted for a 5-year period, an equal number, or proportion of the births are assumed to occur every year, 200 per year. Actual year-to-year variations do and will occur, but overall year to year trends are expected to be constant.

## METHODOLOGY

The population forecasts presented in this report are the result of using the Cohort-Component Method of population forecasting. (Siegel, and Swanson, 2004: 561-601) (Smith et. al. 2004) As stated in the INTRODUCTION, the difference between a projection and a forecast is in the use of explicit judgment based upon the unique features of the area under study. Strictly speaking, a cohort projection refers to the future population that would result from a mathematical extrapolation of historical trends. Conversely, a cohort-

component forecast refers to the future population that is expected because of a studied and purposeful selection of the components of change (i.e., births, deaths, and migration) and forecast models are developed to measure the impact of these changes in each specific geographic area.

Five sets of data are required to generate population and enrollment forecasts. These five data sets are:

1. a base-year population (here, the 2010 Census population for Billings Public Schools and its attendance areas);
2. a set of age-specific fertility rates for the district to be used over the forecast period and its attendance areas;
3. a set of age-specific survival (mortality) rates for the district and its attendance areas;
4. a set of age-specific migration rates for the district and its attendance areas; and;
5. the historical enrollment figures by grade.

The most significant and difficult aspect of producing enrollment forecasts is the generation of the population forecasts in which the school age population (and enrollment) is embedded. In turn, the most challenging aspect of generating the population forecasts is found in deriving the rates of change in fertility, mortality, and migration. From the standpoint of demographic analysis, the Billings Public Schools is classified as a "small area" population (as compared to the population of the state of Montana or to that of the United States). Small area population forecasts are more complicated to forecast of the migration calculate because local variations in fertility, mortality, and migration may be more irregular than those at the regional, state or national scale. Especially challenging is the rates for local areas, because changes in the area's socioeconomic characteristics can quickly change from past and current patterns. (Peters and Larkin, 2002)

The population forecasts for Billings Public Schools were calculated using a cohort-component method with the populations divided into male and female groups by five-year age cohorts that range from 0-to-4 years of age to 85 years of age and older (85+). Age- and sex-specific fertility, mortality, and migration models were constructed to specifically reflect the unique demographic characteristics of each of the attendance areas in the Billings Public Schools.

The enrollment forecasts were calculated using a modified average survivorship method. Average survivor rates (i.e., the proportion of students who progress from one grade level to the next given the average amount of net migration for that grade level) over the previous five years of year-to-year enrollment data were calculated for grades two through twelve. This procedure is used to identify specific grades where there are large numbers of students changing facilities for non-demographic factors, such as private school transfers or enrollment in special programs.

The survivorship rates were modified or adjusted to reflect the average rate of forecasted in and out migration of 5-to-9, 10-to-14 and 15-to-17 year-old cohorts to each of the

attendance centers in Billings Public Schools for the period 2010 to 2015. These survivorship rates then were adjusted to reflect the forecasted changes in age-specific migration the district should experience over the next five years. These modified survivorship rates were used to project the enrollment of grades 2 through 12 for the period 2015 to 2020. The survivorship rates were adjusted again for the period 2020 to 2025 to reflect the predicted changes in the amount of age-specific migration in the district for the period.

The forecasted enrollments for kindergarten and first grade are derived from the 5-to-9 year-old population of the age-sex population forecast at the elementary attendance center district level. This procedure allows the changes in the incoming grade sizes to be factors of forecasted population change and not an extrapolation of previous class sizes. Given the potentially large amount of variation in kindergarten enrollment due to parental choice, changes in the state's minimum age requirement, and differing district policies on allowing children to start kindergarten early, first grade enrollment is deemed to be a more accurate and reliable starting point for the forecasts. (McKibben, 1996) The level of the accuracy for both the population and enrollment forecasts at the school district level is estimated to be  $\pm 2.0\%$  for the life of the forecasts.

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