



Our Missoula Development Guide



2018-2020 Yearbook

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View of city from Missoula Peace Park. Photo by Benjamin Brewer.

View of city from Mt. Jumbo. Cover Photo by Laval Means

Introduction

Since 2007, Missoula has conducted a periodic process of updating community planning information with an emphasis on determining how the community should accommodate housing needed for the expected increase in population over the next 20 years. It was expected that about 15,000 residential units would be needed in the period from 2008 to 2028.

In 2015, the City adopted the “Our Missoula, City Growth Policy 2035.” The major theme of the plan is to focus new growth toward areas already established or well planned, with services and infrastructure readily available. The Growth Policy also integrated policy direction and implementation ideas that support sustainability and community place making.

The Urban Fringe Development Area (UFDA) reports served the community well by highlighting the type, location, and potential impacts of new residential development. However, the UFDA approach fell short in that it broadly directed (or “allocated”) residential development to certain areas without a strong direction on how that development would best serve its residents.

A new approach was sought that considered the updated Growth Policy directives, and level of service mapping for certain community services interfacing with a metric for developable lands in order to represent opportunities for new growth.

In 2018, in observation of the 10-year (halfway) mark of the study, an update to the process was carried out and the Urban Fringe Development Area Project (UFDA) was replaced with the Our Missoula Development Guide (OMDG). A major part of this new approach was a greater focus on the area of land in which development was possible in and around the City of Missoula. Through this framework, tiers of “suitability” were established.

Suitability

Suitability is a measure of access to infrastructure, services, and amenities deemed desirable for new developments in the *2015 Our Missoula Growth Policy*. Suitability is intended to be a measure of what land should be developed.

The most basic requirement for land to be considered suitable is access to water and sewer infrastructure - land must be within 500 feet of public sewer or water mains.

Access to other services and amenities made up the rest of the suitability score. These Suitability Tiers follow planning principles derived from the Growth Policy and incorporate the data available to produce a quantitative spatial assessment of the most suitable places for development. The higher the number, the more suitable a location is for development. Below is the breakdown of Suitability Tiers:

Suitability Tier Definitions

Tier 1: “Minimally Suitable” hexagons are within 500 feet of public sewer and water. Infrastructure costs can be a burden on development, so developing where infrastructure already exists helps lower construction overhead and should translate to improved affordability. This tier is primarily found along the fringe.

Tier 2: “Fairly Suitable” hexagons are within a quarter mile distance of any two of the following suitable features: commercial service areas, grocery stores, transit stops, commuter trail, parks, or schools. This generally runs along the edge of the core.

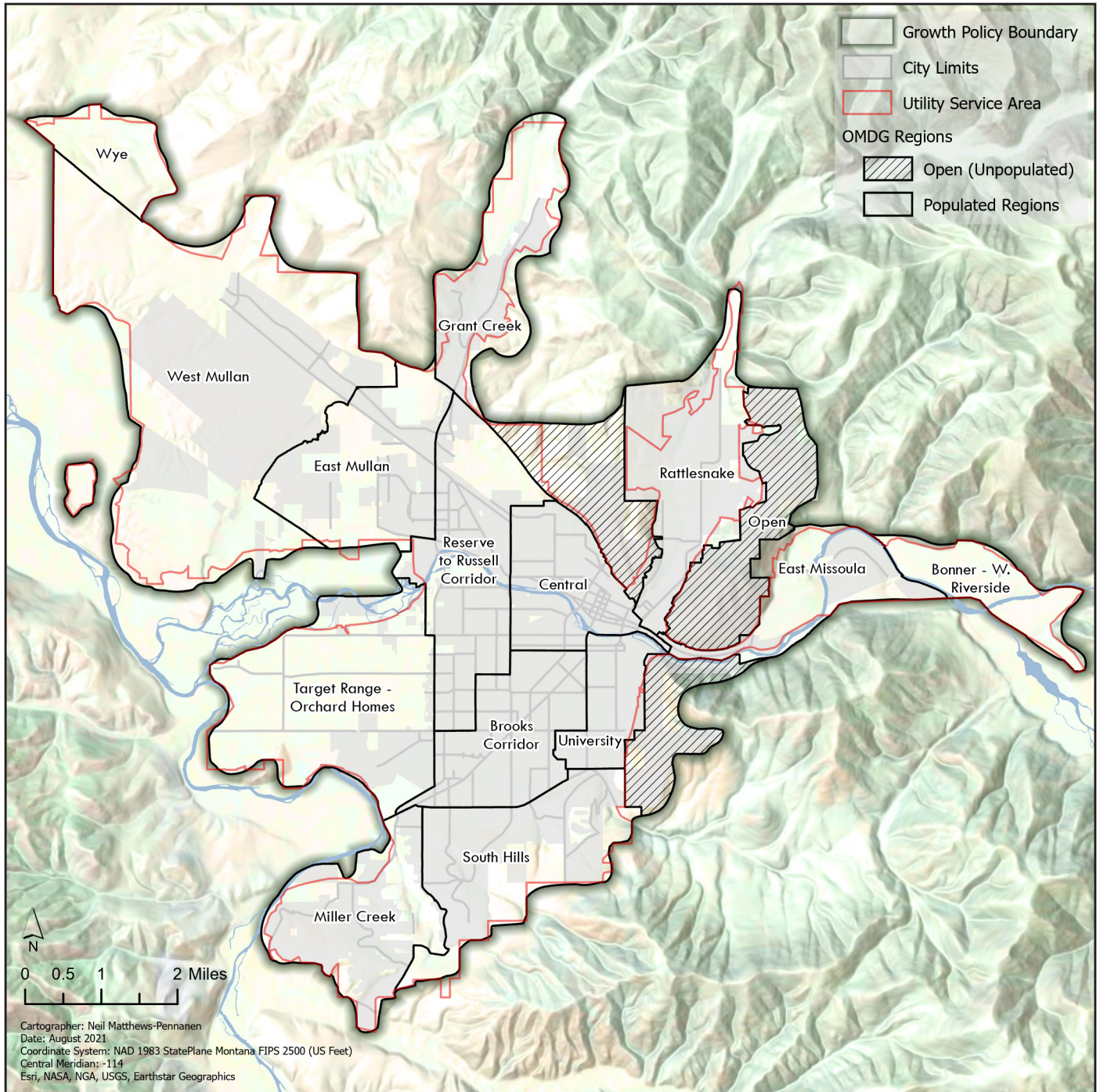
Tier 3: “Suitable” hexagons have similar criteria to Tier 2, but require that three or more features are within a quarter mile.

Tier 4: “Very Suitable” hexagons are within a quarter mile of a commercial service area, a grocery store, a commuter trail, and a transit stop. These strict criteria show the top tier of suitability inside the core.

Tier 0: “Future Potential” hexagons have future suitability in either Tier 2 or 3 once they receive sewer, water, or both. A large area of Tier 0 can be found near the Fort Missoula regional park where added sewer and services would increase to Tier 3.

This OMDG Yearbook will focus on the development that occurred from 2018 through 2020 through the lens of Suitability established in the *OMDG Looking Forward 2018-2028* report. Like the earlier reports, this yearbook informs community policy primarily pertaining to housing, population, development, acquisitions, and infrastructure for the Missoula Urban Services Area.

OMDG Study Area and Regions



The UFDA/OMDG project has used the Growth Policy Boundary (~40,250 acres) from the *Our Missoula 2035 City Growth Policy* since it was adopted in 2015 as the project study area.

Previous versions of the UFDA project used Urban Services Area (URSA, ~33,000 acres). The Growth Policy Boundary is based upon, and closely follows the Urban Services Area, but extends into open lands surrounding the urban area where not much development is expected, adding over 7,000 acres to the study area.

The UFDA/OMDG “Regions” are divisions of the study area that are used for analyzing development. There are 14 regions designated in this study where development is expected. These regions do not follow the same boundaries as City Neighborhood Council boundaries.

The “Open” region fills the area covered by the Growth Policy Boundary in lands where development is not expected due to topographical constraints and designation as open space. These areas are shown hatched on the map above.

Summary

Quick Facts

- OMDG Study Area: 40,253 Acres
- Est. Population: 96,300
- Est. Housing Units: 45,109
- Est. Gross Density*: 1.1 Dwelling Units per Acre
- Est. Net Density**: 2.66 DUAC
- Ann. Growth Rate of DUs (2011-2020): 1.36%

- 1636 residential units added 2018-2020
- 5702 residential units added since 2010
- 570 units added per year from 2011-2020

- New Major Subdivisions (2018-2020): 2 City, 0 County
- Reserve of Entitlements: 4,358

* Gross Density = DUs/ Growth Policy Area

** Net Density = DUs/(Growth Policy Area minus land contrained from development through physical (i.e. slope, floodplain) or social (ownership) factors)

Estimates based on Building Permit Data

Year	New Dwellings	Est Dwellings	Growth Rate
2011	538	39945	1.37%
2012	288	40233	0.72%
2013	546	40779	1.36%
2014	516	41295	1.27%
2015	533	41828	1.29%
2016	795	42623	1.90%
2017	850	43473	2.01%
2018	496	43969	1.14%
2019	494	44463	1.12%
2020	646	45109	1.45%
Average	570		1.36%

Estimates based on Decennial Census Data

2010	Annual Net: 444	37279	
2020	Total: 4,444	41723	1.19%

Development of new residential dwellings has averaged 570 units over the past 10 years. This falls within the Growth Policy's stated range of new housing: 510 to 700 units per year. Over this 10-year period there has been a wide fluctuation in annual development, from 288 units in 2012 to 850 units in 2017.

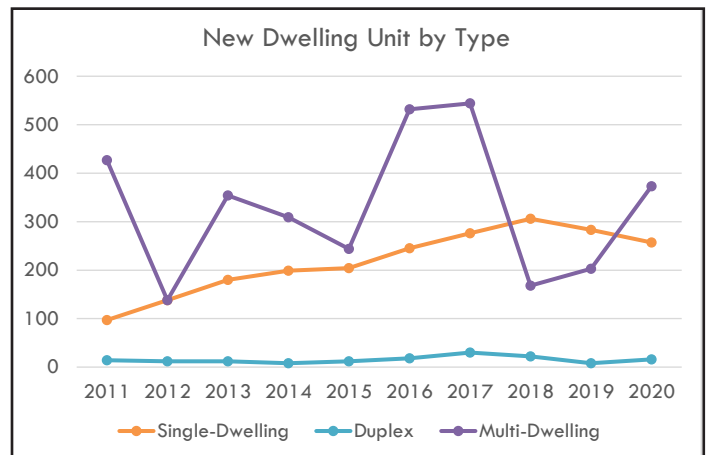
This variation has continued during the three years covered by this report. In 2018 and 2019, just below 500 new residential units were built. In 2020, production increased to almost 650 units. The average over the decade has been an increase in dwelling units of 1.36% each year.

This has resulted in a slow increase in net housing unit density over the course of this project from 2.0 dwelling units per acre (DUAC) in 2007 to 2.57 DUAC in 2017 to 2.66 DUAC in 2020.

Development over the last 10 years has averaged 570 additional units per year. This only looks at new dwelling units added, not those that have been lost. Using US Census totals for 2010 and 2020 gives a closer approximation of the net dwelling unit addition of 444 units per year for a total of 41,723 dwelling units.

New to the yearbook analysis in this version is the assessment of new development by Suitability Tier. Over the three-year period, the Suitability Tiers with the most development were tiers 1 and 2 (minimally suitable and fairly suitable). There was more development on land determined to be not suitable than on land in the highest Suitability Tier.

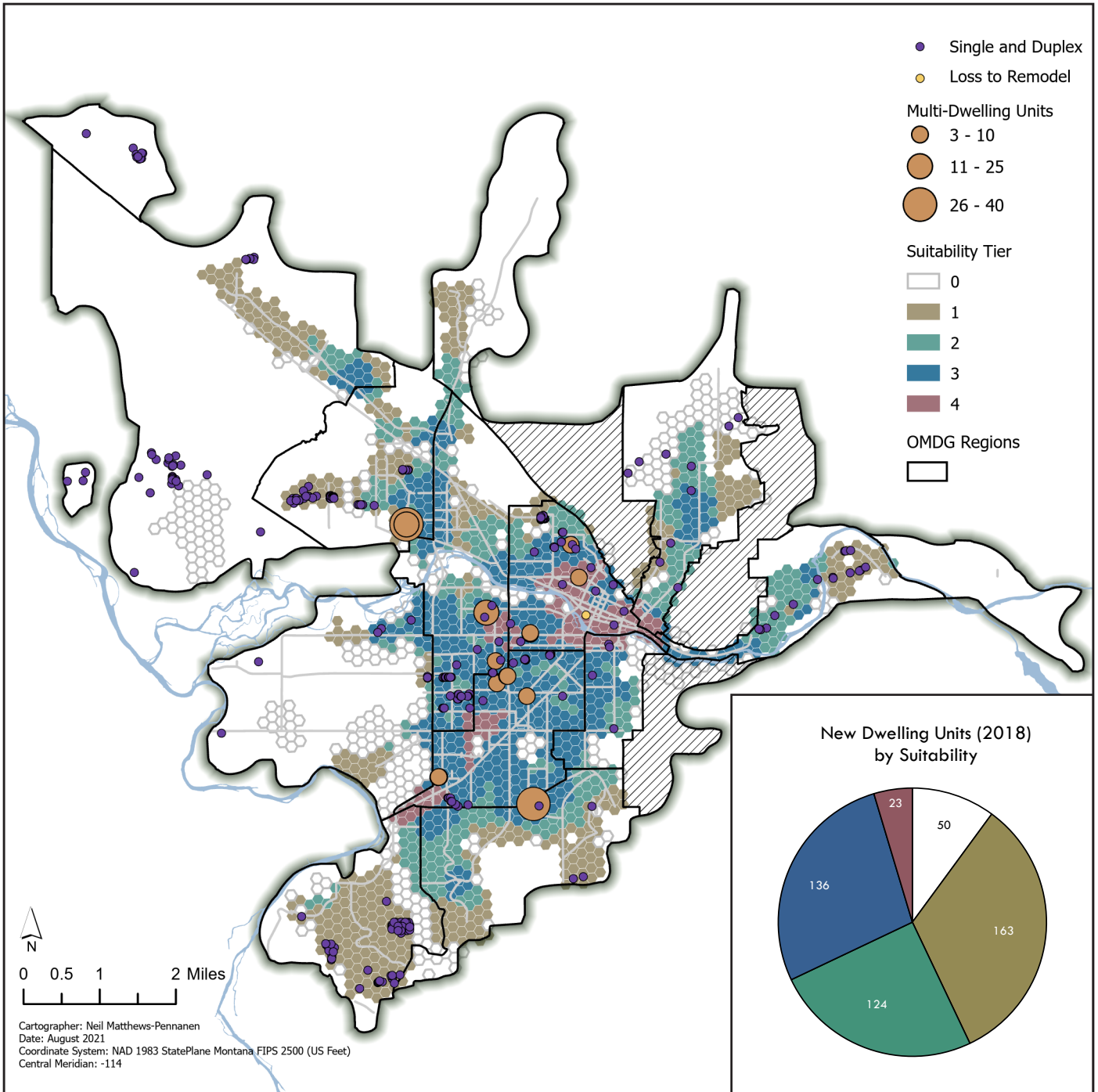
Over the last 10 years, only 2018 and 2019 saw production of more single-dwelling (SD) units than multi-dwelling (MD) units. We believe this is more a result of the high variability of multi-dwelling unit production from year to year than a long-term trend. This is supported by the increase of multi-dwelling unit production in 2020 after these two lower MD production years.



Two new subdivisions were approved in the study area between 2018 and 2020. Both are in the East Mullan OMDG region, within the City of Missoula, and were approved in 2020. These include Heron's Landing, with a potential buildout of 342 new dwelling units, and Remington Flats, with a potential buildout of 152 new dwelling units. McNett Flats is another subdivision that has been approved in 2021 and has the potential to contribute 671 new residential units when it is built out.

Residential Building Permits

2018



Cartographer: Neil Matthews-Pennanen
 Date: August 2021
 Coordinate System: NAD 1983 StatePlane Montana FIPS 2500 (US Feet)
 Central Meridian: -114

In 2018, the City issued 461 residential building permits and the County issued 35 within the study area. A total of 496 new units were permitted: 306 units were single-dwelling homes, 22 units were in duplexes, and 168 units were in 16 multi-dwelling developments.

The region with the most new development was East Mullan (126 units). Significant development occurred closer to the core of the City, like in the Central region (64 units) and the Reserve to Russell Corridor (72 units).

2018 Permits by Dwelling Type

Admin	Dwelling Type	2018 Permits	2018 Units	2018 Percent Units
City	Single	273	273	59.2%
	Duplex	10	20	4.3%
	Multi	16	168	36.4%
	Total (City)	299	461	
County	Single	33	33	94.3%
	Duplex	1	2	5.7%
	Multi	0	0	0%
	Total (County)	34	35	

Development Summary

2018

Development in Each Region by Suitability

New Dwellings (2018)	Very Suitable	Suitable	Fairly Suitable	Minimally Suitable	Future Potential	Not Suitable	Total by Region
Bonner - W. Riverside	0	0	0	0	0	0	0
Brooks Corridor	2	30	19	1	0	0	52
Central	18	20	4	22	0	0	64
East Missoula	0	0	0	18	0	0	18
East Mullan	0	0	76	50	0	0	126
Grant Creek	0	0	0	0	0	0	0
Miller Creek	0	0	0	59	0	0	59
Rattlesnake	0	1	1	3	0	5	10
Reserve to Russell Corridor	0	48	21	2	0	0	71
South Hills	0	36	0	3	0	0	39
Target Range - Orchard Homes	0	0	3	4	0	2	9
University	3	1	0	1	0	0	5
West Mullan	0	0	0	0	0	33	33
Wye	0	0	0	0	0	10	10
Total by Suitability Tier	23	136	124	163	0	50	496

Development was spread across the Suitability Tiers, though only 5% of new development occurred in areas deemed “very suitable”. A higher proportion of development occurred in the next tier down, “suitable” areas - 27%. The vast majority (85%) of development occurred in areas in the middle of the Suitability Tiers - “minimally suitable” (tier 1) to “suitable” (tier 3).

A smaller, but consequential portion of development occurred in areas determined to be “not suitable” (10% of new dwelling units). This means that this proportion of development was more than 500 feet from existing sewer and water infrastructure, requiring significant new sewer and water infrastructure.

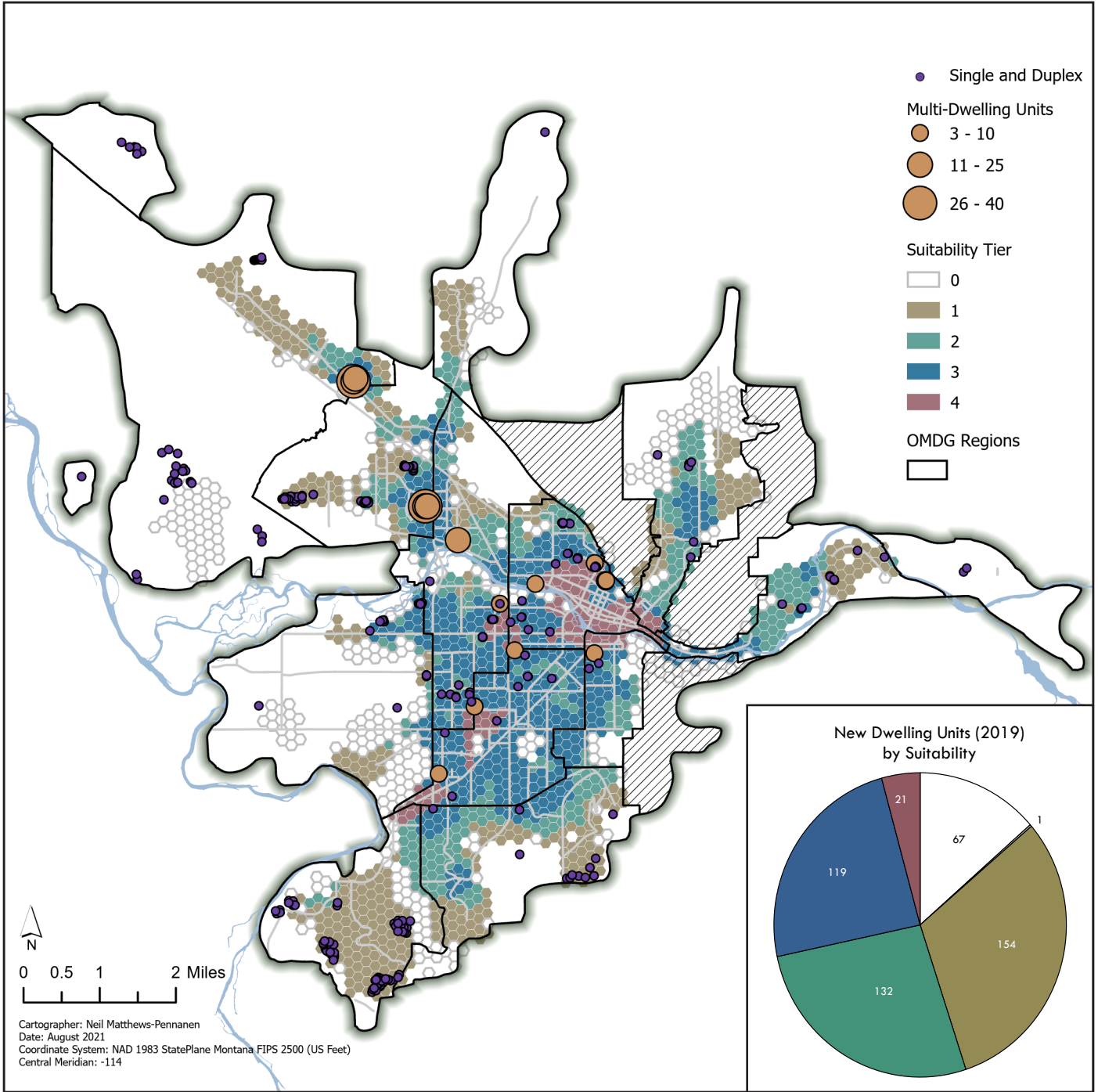
2018 Proportion of Development by Suitability

Suitability	Percent of Development (2018)
Not Suitable	10%
Tier 0: Future Potential	0%
Tier 1: Minimally Suitable	33%
Tier 2: Fairly Suitable	25%
Tier 3: Suitable	27%
Tier 4: Very Suitable	5%



Residential Building Permits

2019



In 2019, the City issued 462 residential building permits and the County issued 32 within the study area. A total of 494 new units were permitted: 283 units were single-dwelling homes, 8 units were in duplexes, and 203 units were in 18 multi-dwelling developments.

The regions with the most new development were East Mullan (113 units) and West Mullan (119 units).

2019 Permits by Dwelling Type

Admin	Dwelling Type	2019 Permits	2019 Units	2019 Percent Units
City	Single	253	253	54.8%
	Duplex	3	6	1.3%
	Multi	18	203	43.9%
	Total (City)	274	462	
County	Single	30	30	93.8%
	Duplex	1	2	6.3%
	Multi	0	0	0.0%
	Total (County)	31	32	

Development Summary

2019

Development in Each Region by Suitability

New Dwellings (2019)	Very Suitable	Suitable	Fairly Suitable	Minimally Suitable	Future Potential	Not Suitable	Total by Region
Bonner - W. Riverside	0	0	8	0	0	3	11
Brooks Corridor	0	27	5	0	0	0	32
Central	13	23	0	7	0	0	43
East Missoula	0	0	2	0	0	0	2
East Mullan	0	54	0	57	0	2	113
Grant Creek	0	0	0	0	0	1	1
Miller Creek	0	0	0	62	0	18	80
Rattlesnake	0	0	2	3	0	1	6
Reserve to Russell Corridor	8	8	13	13	1	0	43
South Hills	0	2	0	8	0	2	12
Target Range - Orchard Homes	0	0	15	4	0	2	21
University	0	5	0	0	0	0	5
West Mullan	0	0	87	0	0	32	119
Wye	0	0	0	0	0	6	6
Total by Suitability Tier	21	119	132	154	1	67	494

Development was spread across the Suitability Tiers, though only 4% of new development occurred in areas deemed “very suitable”. The vast majority (82%) of development occurred in areas in the middle of the Suitability Tiers - “minimally suitable” (tier 1) to “suitable” (tier 3).

A smaller, but consequential portion of development occurred in areas determined to be “not suitable” (14% of new dwelling units). This means existing water and sewer infrastructure was more than 500 feet away from these projects.

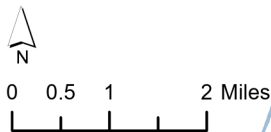
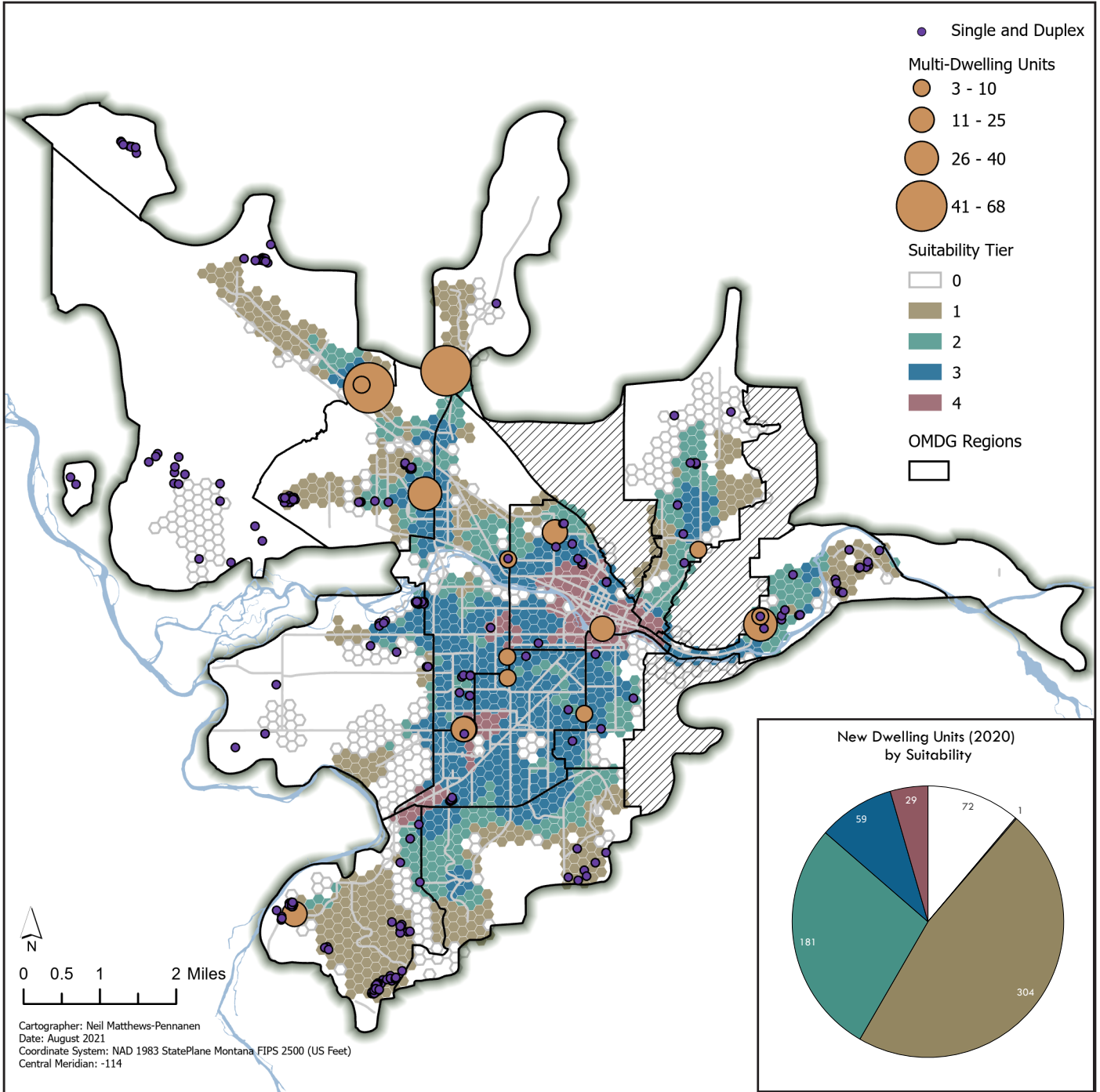


2019 Proportion of Development by Suitability

Suitability	Percent of Development (2019)
Not Suitable	14%
Tier 0: Future Potential	0%
Tier 1: Minimally Suitable	31%
Tier 2: Fairly Suitable	27%
Tier 3: Suitable	24%
Tier 4: Very Suitable	4%

Residential Building Permits

2020



Cartographer: Neil Matthews-Pennanen
 Date: August 2021
 Coordinate System: NAD 1983 StatePlane Montana FIPS 2500 (US Feet)
 Central Meridian: -114

In 2020, the City issued 551 residential building permits and the County issued 47 within the study area. A total of 646 new units were permitted: 257 units were single-dwelling homes, 16 units were in duplexes, and 373 units were in 20 multi-dwelling developments.

Development was spread throughout the study area, though more than half of the new dwelling units were built in Miller Creek, Grant Creek, and East Mullan regions - areas outside the urban core.

2020 Permits by Dwelling Type

Admin	Dwelling Type	2020 Permits	2020 Units	2020 Percent Units
City	Single	210	210	38.1%
	Duplex	4	8	1.5%
	Multi	16	333	60.4%
	Total (City)	230	551	
County	Single	47	47	49.5%
	Duplex	4	8	8.4%
	Multi	2	40	42.1%
	Total (County)	53	95	

Development Summary

2020

Development in Each Region by Suitability

New Dwellings (2020)	Very Suitable	Suitable	Fairly Suitable	Minimally Suitable	Future Potential	Not Suitable	Total by Region
Bonner - W. Riverside	0	0	0	0	0	0	0
Brooks Corridor	0	29	17	0	0	0	46
Central	28	10	16	11	0	0	65
East Missoula	0	0	3	65	0	0	68
East Mullan	0	0	102	43	0	0	145
Grant Creek	0	0	0	105	0	1	106
Miller Creek	0	1	0	58	0	22	81
Rattlesnake	0	1	3	11	0	2	17
Reserve to Russell Corridor	1	14	8	1	0	0	24
South Hills	0	0	0	7	0	1	8
Target Range - Orchard Homes	0	0	22	2	1	3	28
University	0	4	1	1	0	0	6
West Mullan	0	0	9	0	0	34	43
Wye	0	0	0	0	0	9	9
Total by Suitability Tier	29	59	181	304	1	72	646

Infill development in highly suitable areas did occur, though development in higher tiers of suitability (namely Tier 3: Suitable and Tier 4: Very Suitable) only made up 13% of new development. Development in minimally suitable and not suitable areas made up 58% of development. Development in fairly suitable areas accounted for the other 28% of residential development.

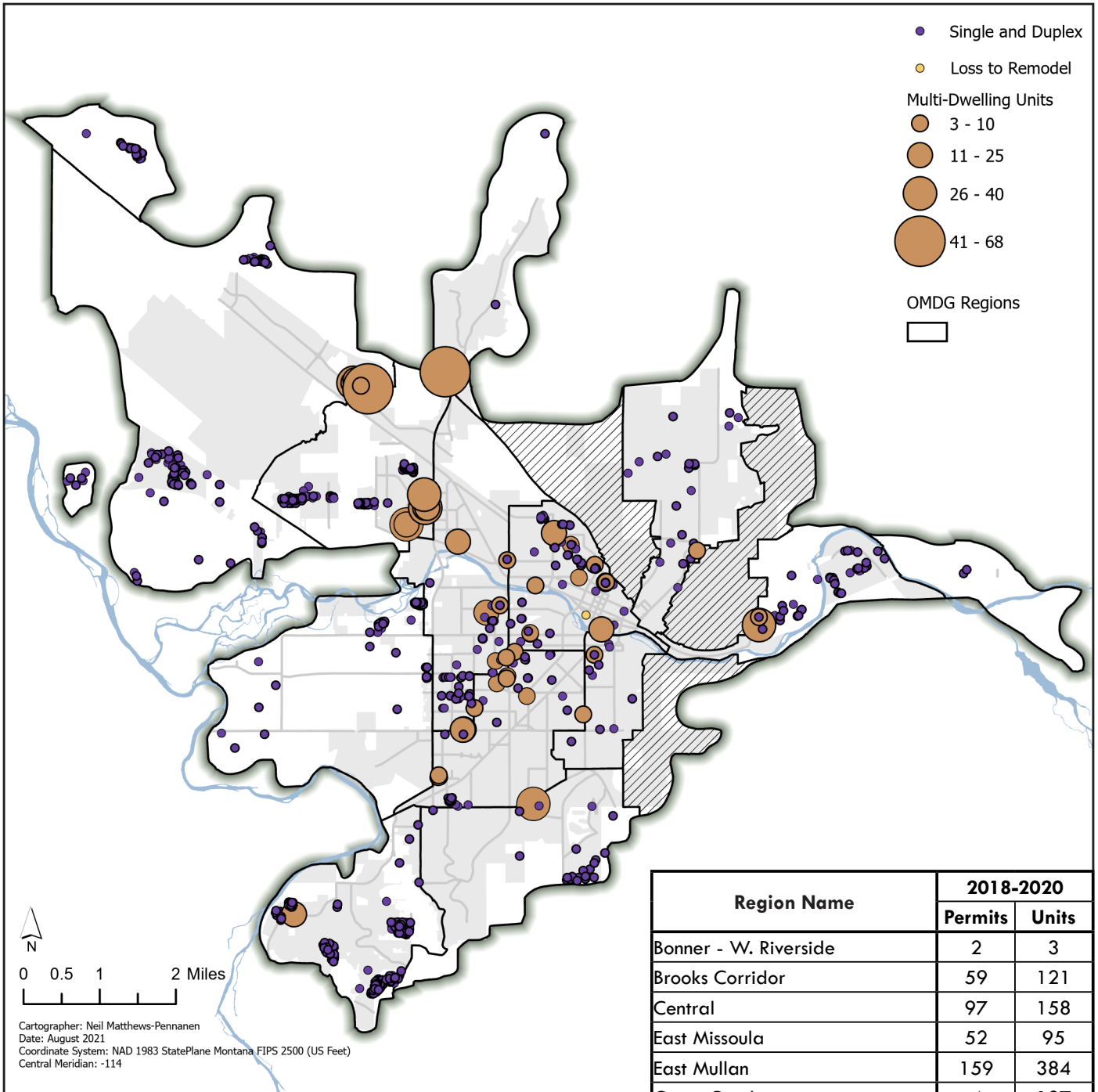


2020 Proportion of Development by Suitability

Suitability	Percent of Development (2020)
Not Suitable	11%
Tier 0: Future Potential	0%
Tier 1: Minimally Suitable	47%
Tier 2: Fairly Suitable	28%
Tier 3: Suitable	9%
Tier 4: Very Suitable	4%

Residential Building Permits

2018-2020



Region Name	2018-2020	
	Permits	Units
Bonner - W. Riverside	2	3
Brooks Corridor	59	121
Central	97	158
East Missoula	52	95
East Mullan	159	384
Grant Creek	4	107
Miller Creek	196	221
Rattlesnake	27	33
Reserve to Russell Corridor	96	156
South Hills	24	58
Target Range - Orchard Homes	64	64
University	12	16
West Mullan	102	195
Wye	24	25
Total	918	1636

From 2018-2020 more residential units were developed in East Mullan than in any other region. Development pressure in this area prompted the adoption of the Sx*tpqyen Area Master Plan in 2020 to shape the way development occurs.

Development in the core regions of Brooks Corridor, Central, Reserve to Russell Corridor, and University totaled 451 units - about 28% of total development.

Multi-Dwelling Development

Multi-Dwelling Projects by Number of Units

Number of Units per Multi-Dwelling Project	2018		2019		2020		2018-2020 Total	
	Projects	Total Units	Projects	Total Units	Projects	Total Units	Projects	Total Units
3-7	11	43	11	50	4	22	26	115
8-10	0	0	0	0	4	35	4	35
11-20	3	50	3	45	4	50	10	145
21-50	2	75	4	108	4	135	10	318
50+	0	0	0	0	2	131	2	131
Total	16	168	18	203	18	373	52	744

Developments designed for affordability and individuals with unstable housing over the three year period included 7 units at Lee Gordon Place (Suitability Tier 4), 6 units on Montana St (Tier 2), and 12 units in the Cornerstone apartments (Tier 1). This means the developments on Montana St and the Cornerstone apartments will have less-than-ideal access to services. For affordable developments in particular this could present challenges as residents who live there will be less likely to each have access to personal vehicles.

In 2018 and 2019, similar profiles of multi-dwelling projects occurred with most projects in the 3-7 unit range. Development in 2020 included projects larger than 50 units, something that had not occurred in 2018 or 2019. This included projects in Grant Creek Village and on Majestic Rd, contributing 131 new units to the study area's housing stock.



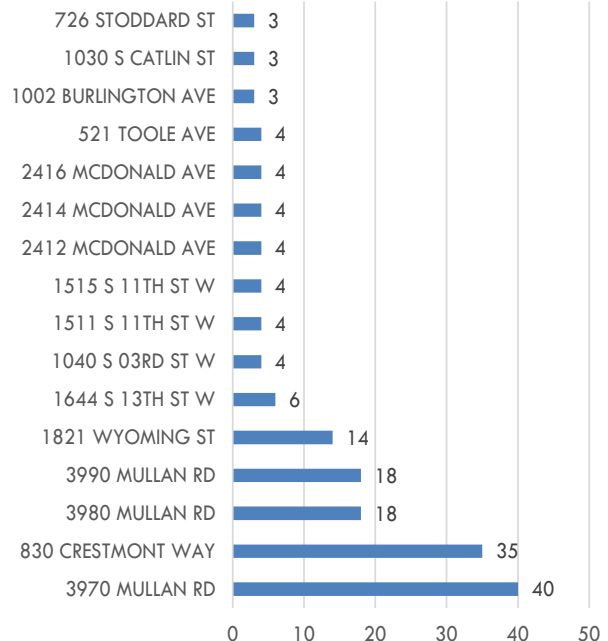
3970 Mullan Rd - Brooklyn West Apartments (49 DUAC)

In 2018, multi-dwelling projects averaged approximately 11 units per project and 33 dwelling units per acre.

Multi-Dwelling Units by Region

Region Name	2018-2020
	MD Units
Bonner - W. Riverside	0
Brooks Corridor	72
Central	65
East Missoula	40
East Mullan	232
Grant Creek	105
Miller Creek	27
Rattlesnake	7
Reserve to Russell Corridor	62
South Hills	35
Target Range - Orchard Homes	0
University	3
West Mullan	96
Wye	0
Total	744

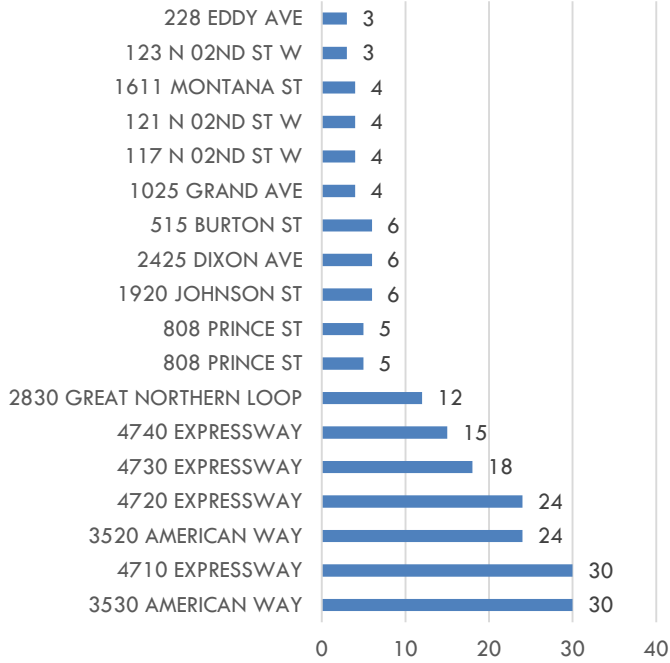
2018 Multi-Dwelling Units by Project



Multi-Dwelling Development

In 2019, multi-dwelling projects averaged about 11 units per project and 36 dwelling units per acre.

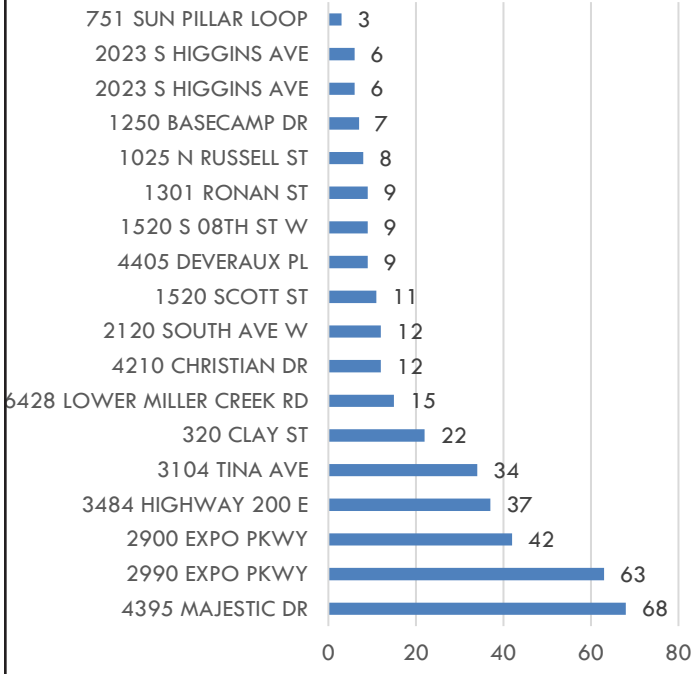
2019 Multi-Dwelling Units by Project



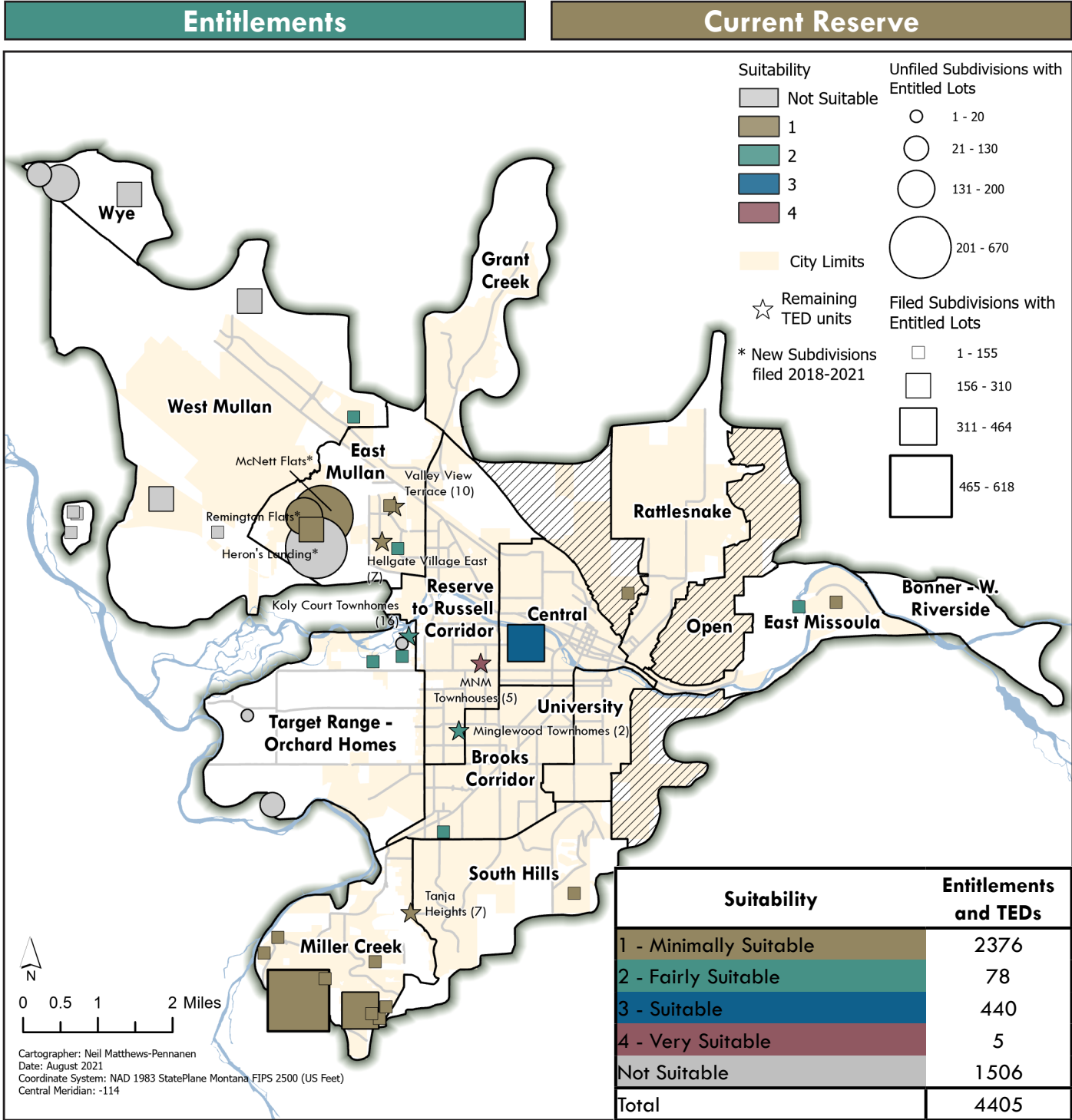
4395 Majestic Dr (39 DUAC)

In 2020, multi-dwelling projects averaged approximately 21 units per project and 39 units per acre.

2020 Multi-Dwelling Units by Project



3530 American Way (44 DUAC)



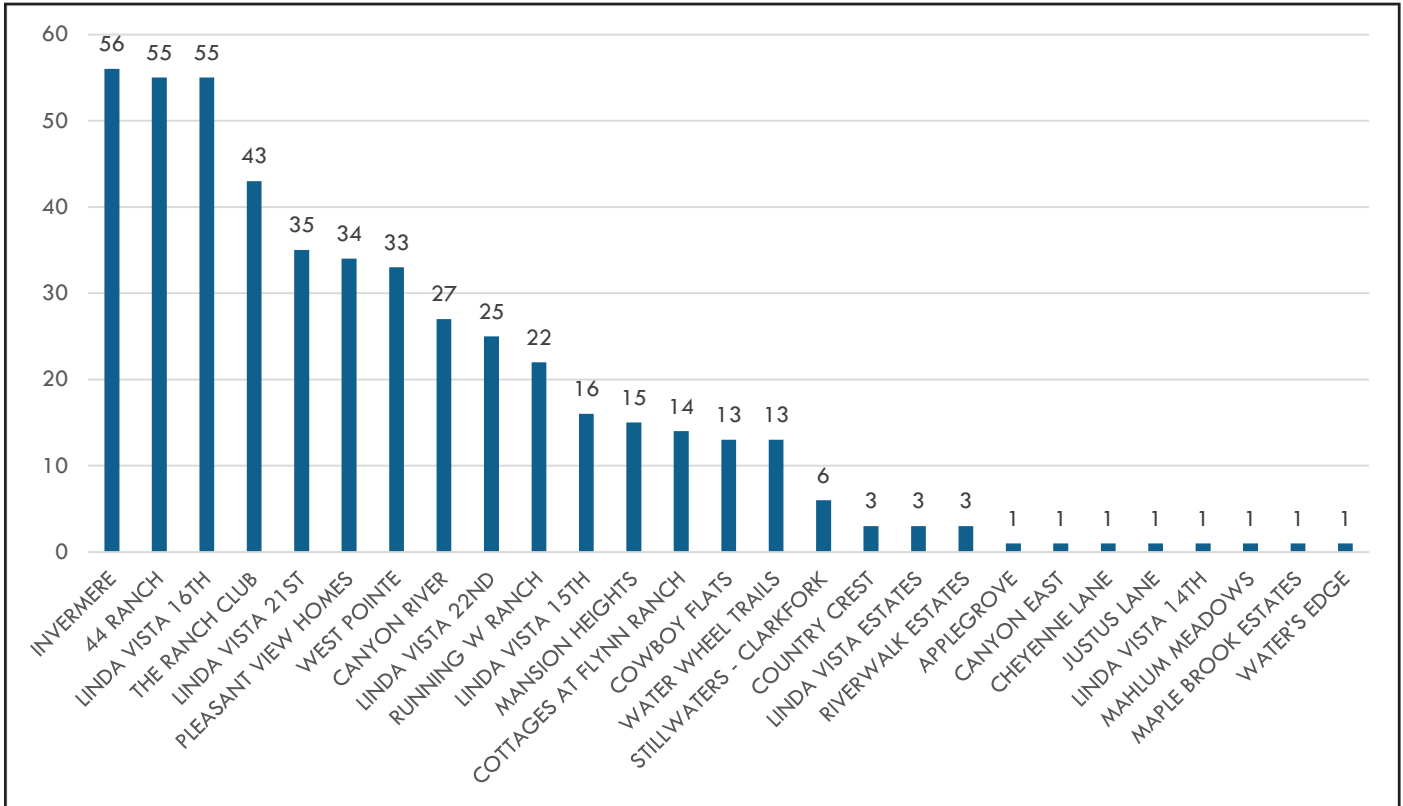
Entitlements are defined as residential units expected from platted lots in approved subdivisions, and expected units from preliminarily approved subdivisions that have not yet been platted. They are a measure of approved development that has not yet occurred. Tracking them gives an idea of how much development is “in the pipeline”. One confounding factor in tracking entitlements is the number of lots expected from particular subdivisions can change over time. This can happen when phases expire or development occurs at a lower density than that preliminarily approved. Both

of these events have occurred in several subdivisions over the past three years, resulting in a lower than expected total reserve of entitlements. Canyon Creek Village had 15 entitled single-family lots but has been fully built out, so these are no longer counted in the entitlement reserve. That is to say, Canyon Creek was ultimately built out at a lower density (by 15 dwelling units) than approved when the preliminary plat was approved. Forty-Four Ranch subdivision still has large areas to be platted and built upon, but after plat amendments the potential number of units is lower than initially approved. There would be 273

Entitlements

Buildout in 2018-2020

Units Developed on Entitlements by Subdivision



lots yet to be developed but given the amount of land remaining, 224 is the maximum number of lots anticipated, resulting in a loss of 49 entitled units. Stonybrook, approved in 2008, is a subdivision where about half of the approved development of 43 lots occurred before it expired in 2020, resulting in a loss of 20 entitled units to the area.

New additions to the entitlement reserve help to balance out these losses. Three new subdivisions (Heron’s Landing, Remington Flats, McNett Flats) have been approved in 2020 and 2021, resulting in 1,170 new entitlements added to the reserve. This results in a current estimated reserve of 4,358 units, or 4,405 when the remaining units on major TEDs are added. Of those 4,358 units, 1,606 are in subdivisions that had not yet filed any phases at the end of 2020. The other 2,752 units are composed of platted lots that have not yet developed and lots that will be platted in future phases of subdivisions that have started filing phases (all lots associated with filed subdivisions). Breaking that number down further, 511 of these units are on vacant lots ready for building and the other 2,241 are lots to be platted in future phases of these filed subdivisions.

Entitled Lots Built and Remaining by Region

Region	New Units	Remaining
Brooks Corridor	13	19
Central	0	440
East Missoula	29	145
East Mullan	103	1474
Miller Creek	191	1060
Rattlesnake	1	21
Reserve to Russell Corridor	1	0
South Hills	15	18
Target Range - Orchard Homes	14	171
West Mullan	89	460
Wye	23	550
Total	479	4358

Entitlements

Development of entitlements made up 32% of new residential development in 2018, 35% in 2019, and 23% in 2020. Over the three years from 2018 to 2020 this meant 29% of this development occurred on entitled land. This follows the previously observed trend that approximately 1/3 of development has occurred on entitlements.

The intent of tracking entitlements is to estimate the number of units that may possibly be developed in the coming years. The table at the right shows units that have been preliminarily approved that will result in newly platted lots by the corresponding expiration years for particular phases of a subdivision. This table can be used to give an estimate of how many developments are in the pipeline, but cannot be counted upon as sure-fire developments in the future. Plats are amended and subdivisions that are preliminarily approved do end up expiring before lots are platted.

These projections do not include all unplatted lots. These are only for subdivisions that are relatively recent or have shown progress since they were preliminarily approved. There are a number of subdivisions approved over 10 years ago that have not platted any lots and none of these are shown in this potential timeline. Consequently, the table shows a subset of unplatted lots that are more likely to be platted by their respective expiration years.

Of these 3,156 potential units, 2,094 are expected to be on lots scheduled to be platted before the end of 2025. An additional 783 potential units are on lots expected to be platted by 2030. There are subdivisions in the study area with phasing plans that extend out to 2040. There are 279 potential units that could be built on lots expected to be platted between 2031 and 2040.

It is important to keep in mind that the future projections are of potential units from lots scheduled to be platted. The rate at which those lots eventually develop may occur at a different (and probably slower) rate. For instance, the 770 units expected to be platted by 2021 are unlikely to all develop in one year.

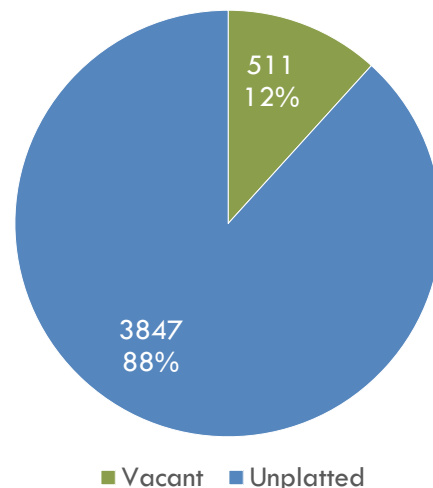
Although there are a large number of new lots expected to be platted in the next decade, these lots do not exist yet. Only 12% of the total entitlement reserve is on vacant land platted in a subdivision. The other 88% is on unplatted land that will become developable once the final platting has been completed.

Future Projections

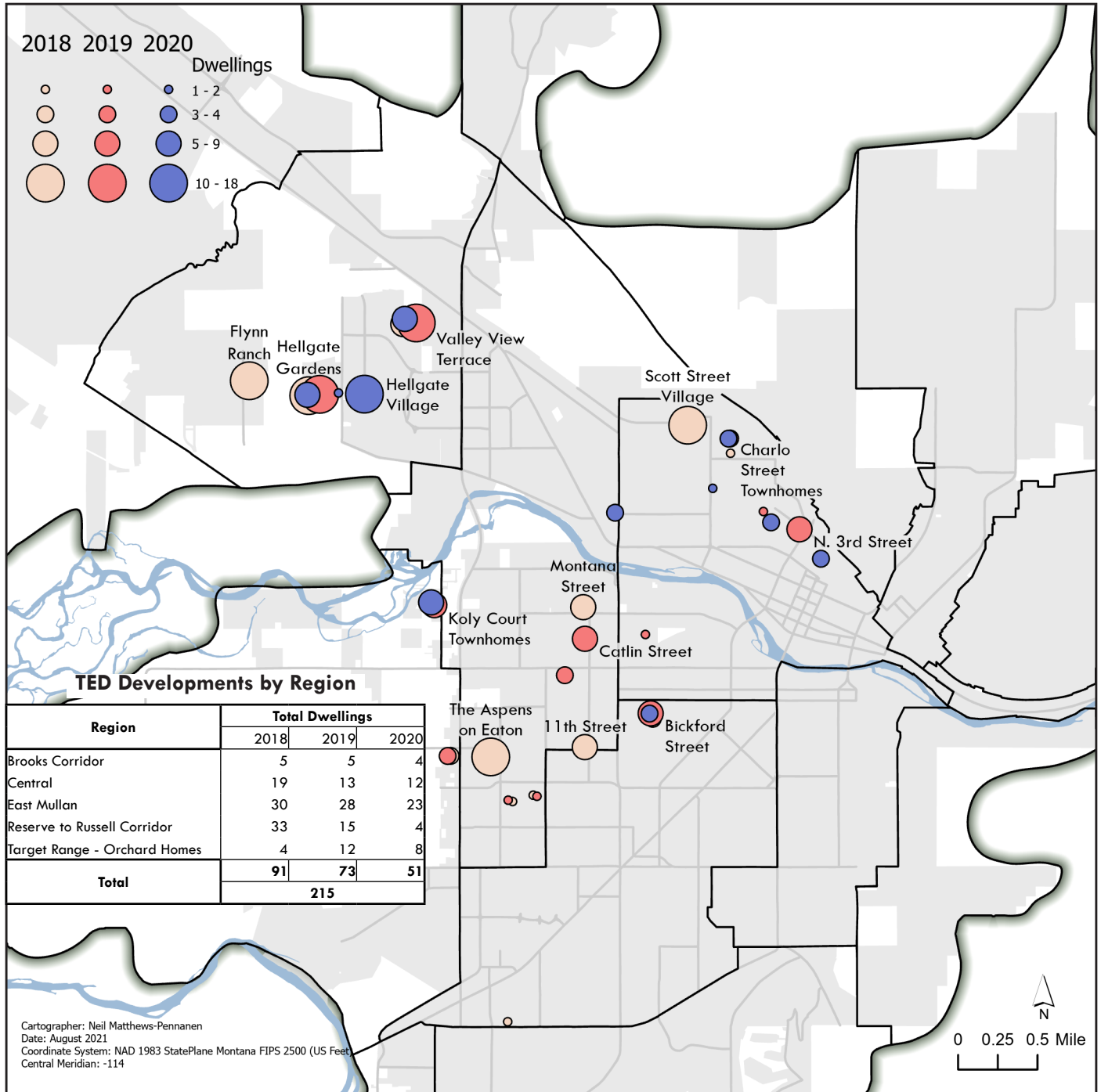
Future Lots to be Platted by Expiration Year

Expiration Year	Units
2021	770
2022	66
2023	116
2024	392
2025	750
2021-2025 Total	2094
2026	48
2027	373
2028	79
2029	58
2030	225
2026-2030 Total	783
2031	82
2032	43
2033	27
2034	0
2035	42
2036	0
2037	26
2038	0
2039	43
2040	16
2031-2040 Total	279
Total	3156

Breakdown of Entitlements



Townhome Exemptions



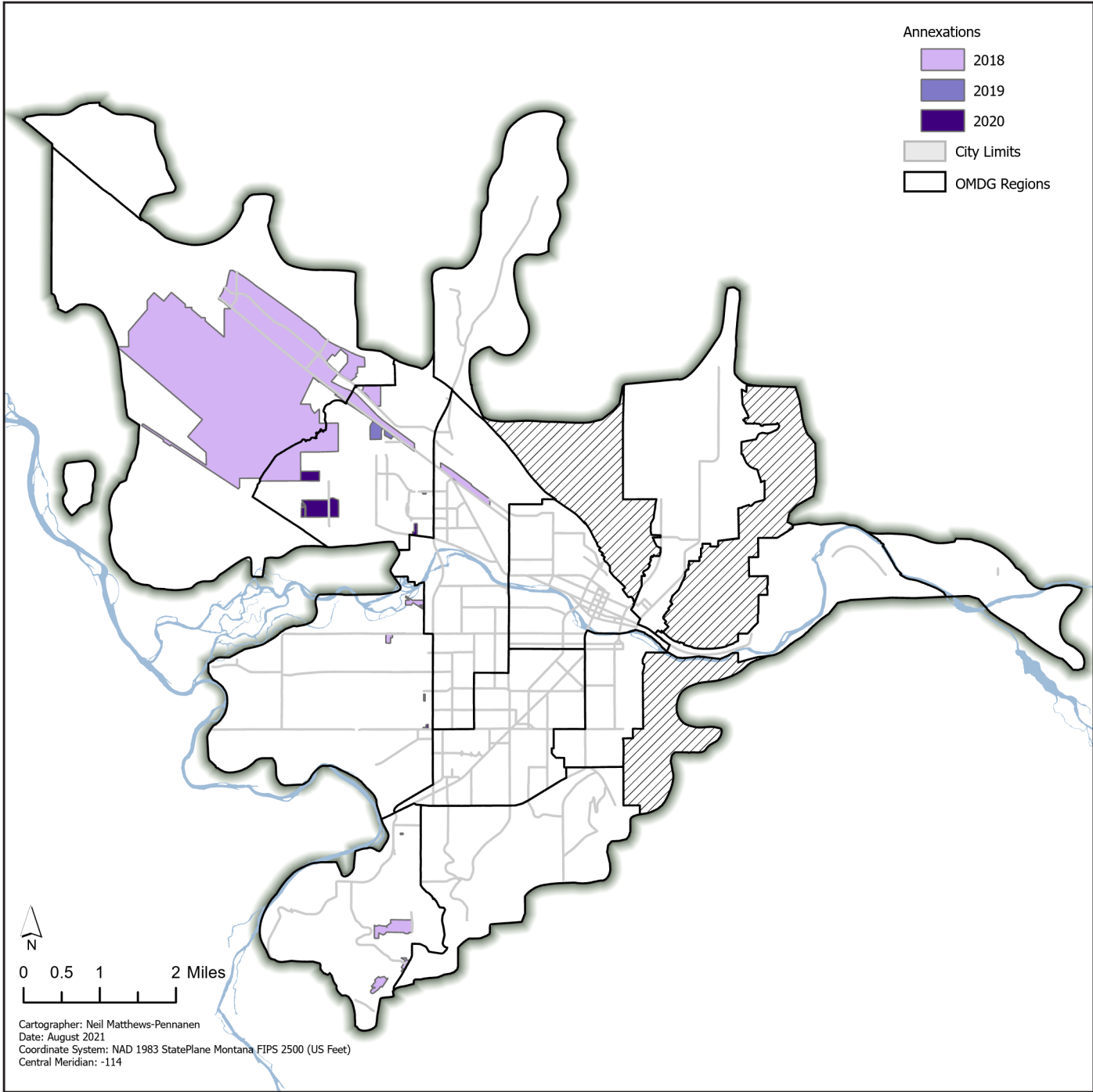
Townhome Exemption Development (TED) is an option for the creation of residential units available through state law as an exemption to the subdivision process.

Major TED development accounted for 215 units from 2018-2020 (minor TEDs are tracked in general building permits). This contributed 13% of the new dwelling units over the 3-year period. The share of new developments decreased over this period, composing 18% of new dwelling units in 2018, 14% in 2019, and 8% in 2020.

In October of 2019, zoning ordinance changes were adopted that focused use of the TED process towards smaller infill development, away from larger greenfield projects. It is therefore unsurprising that there has been a decrease in new building permits associated with TED.

Development through TED is expected to occur relatively fast, and the recent updates codify that this should be the case. For this reason, expected development through TED is treated separately from the larger number of general entitlements.

Annexations



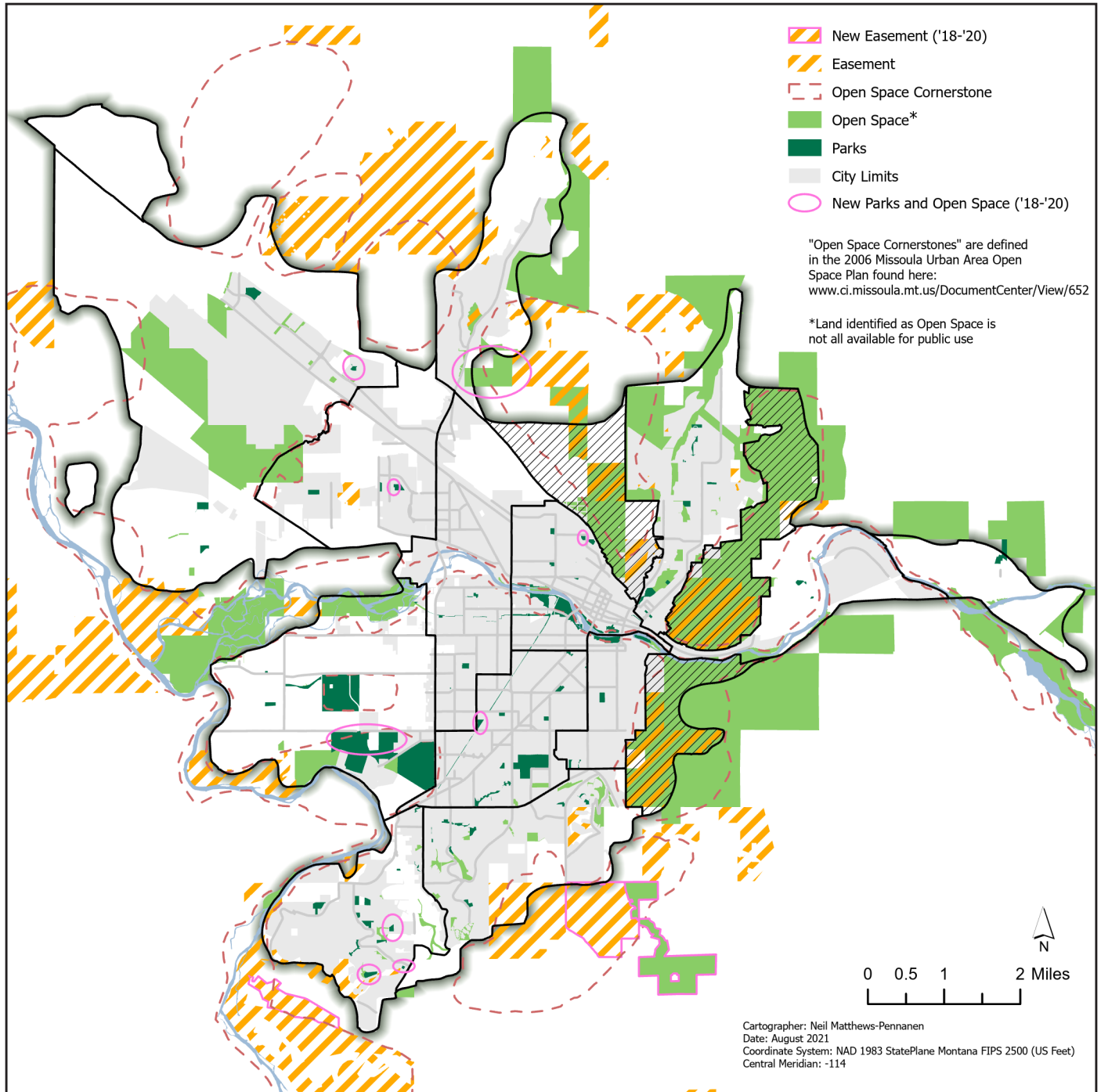
The City annexed approximately 3,309 acres in 2018, 27 acres in 2019, and 93 acres in 2020 for a total of 3429 acres over the three year period.

The vast majority of annexation, occurring in 2018, was composed of the airport and its immediate surroundings. Other significant annexations occurred in regions along the western half of the study area.

Annexations by Region

Region	Annexations	Acres
South Hills	1	1
Miller Creek	2	69
Reserve to Russell Corridor	1	42
Target Range - Orchard Homes	4	23
East Mullan	7	411
West Mullan	1	2884
Total	15	3429

Parks and Conservation



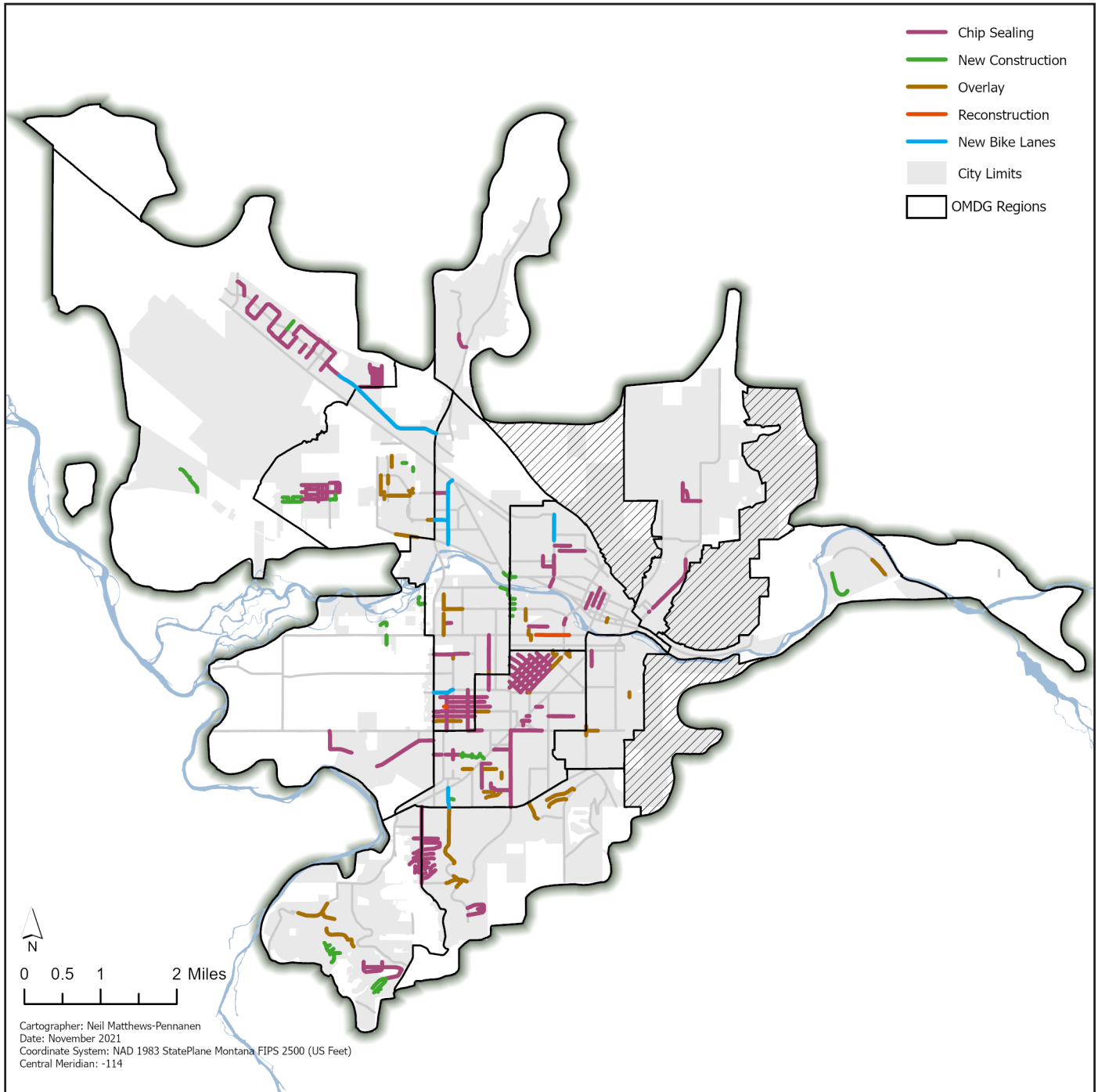
Between 2018 and 2020, 173 acres of Conservation Easements were established near Missoula. These areas are highlighted on the map. The OMDG area now has a total of 11,077 acres of Conservation Easements (including nearby areas shown on map).

In 2020, the Mount Dean Stone acquisition added 360 acres to the City's Open Space land. This acquisition provides potential for a future connection to National Forest Service land.

Parkland acquisition and development totaled 83.8 acres in several regions throughout the City. The largest portion of this new parkland development included phase 1 of development of the Fort Missoula Regional Park (67 acres).

Other park development includes Redfern Park (2.4 acres) in the West Mullan Region and Invermere Park (1.8 acres) in the Miller Creek Region.

Transportation Infrastructure

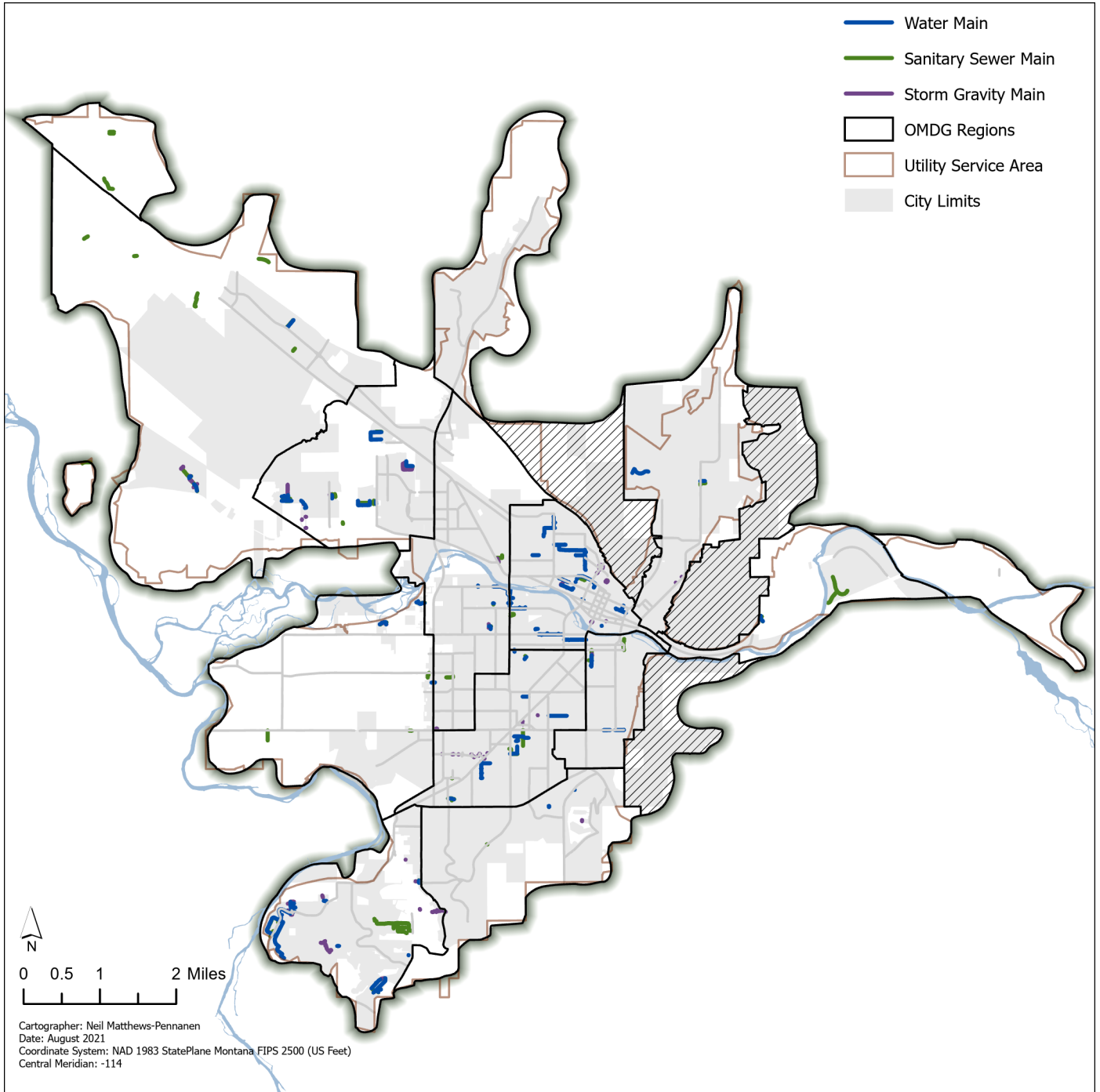


From 2018 through 2020, 49.6 miles of road were constructed, improved, or repaired. Of this work, 35.5 miles were chip sealed; 8.9 miles were overlaid; 4.8 miles were new construction; and 0.5 miles were reconstructed.

the balance between different transportation priorities and how they inform when projects are completed, please refer to the *Missoula Connect 2050 Long-Range Transportation Plan*.

Transportation infrastructure projects completed from 2018 through 2020 added new connections, repaired aging infrastructure, and enhanced the overall transportation network to prepare for population growth and the development that comes with it. For more on

Sewer & Water Infrastructure



During 2018-2020 the City constructed or refurbished 10.4 miles of water main.

Over the same time period the City added 7.1 miles of new sewer main.

Storm water main added from 2018-2020 totaled 2.7 miles.

Generally, more infrastructure was added in regions

farther from the center of the City, particularly in Miller Creek and East Mullan. However, there were significant investments made in infrastructure within the core of the City, notably in the Central and Brooks Corridor regions.

Since a parcel needs to be within 500 feet of sewer and water to be considered “Minimally Suitable”, the expansion of this infrastructure will increase Suitability in some areas of the City. These changes will be reflected the next time the Suitability Tiers are updated.

Conclusion

Development through the Lens of Suitability

The last OMDG report was completed in 2018 and introduced the concept of suitability to this project. The City’s policy to *Focus Inward* means increasing development in areas that are already primed for residential use because infrastructure is in place and services are near. The sorting of the study area into various Suitability Tiers according to the availability of infrastructure and services enables an analysis of how well the City’s Focus Inward goals are being realized by development practices on the ground. This report uses these Suitability Tiers to determine the degree to which recent development has been meeting the goals related to Focus Inward.

Suitability	Percent of Development (18-20)
Not Suitable	12%
Tier 0: Future Potential	0%
Tier 1: Minimally Suitable	38%
Tier 2: Fairly Suitable	27%
Tier 3: Suitable	19%
Tier 4: Very Suitable	4%

From 2018-2020, 23% of new residential development occurred on land determined to be very suitable or suitable. The rest occurred on land with less-than-ideal access to commercial services, parks, transit, biking and walking routes, and water and sewer access. These development outcomes raise the question of whether City development regulations provide enough support to the City’s Focus Inward policy. In the upcoming code reform work, expected to occur 2022-2025, it should be investigated what ways Missoula can adapt its development code to incentivize more development in suitable areas.

Entitled Lots and Subdivision

Over the three years of this study period, development on entitlements made up 29% of new residential units permitted. This is a substantial component of the total development over this time period, contributing to the overall makeup of the developments that occurred from 2018-2020.

After fairly slow development in regions with more single-family lot entitlements for the last decade, development activity increased in Miller Creek and the Wye. Two

Conclusion

new approved subdivisions mark continued additions of entitlements to the reserve. Though 4,358 entitled units is a small increase from the 4,241 entitlements estimated in 2018. This indicates that new entitlements are being added to the reserve at close to the same rate that they are developing.

The Suitability Tiers are a useful lens through which to view development, but other factors aside from suitability influence where development occurs. One such factor is the significance of entitlements to new development within the City. Development through subdivision review tends to happen on larger pieces of land outside of the city core that have limited existing infrastructure or services that were key factors in determining the original Suitability Tiers. As a result of this process of greenfield development, entitlements tend to be on low suitability parcels. Of the 4,405 entitlements in the current reserve, 3,882 (or 88%) are on parcels deemed “Minimally Suitable” or “Not Suitable”.

A Certain Amount of Development is “Baked In”

There is a lag between when land is entitled for development and when that development occurs, with many subdivisions being phased over 10-20 years when they are preliminarily approved. Currently, there is a significant amount of development already “baked in” on existing entitlements. In order to increase the suitability of development on entitlements, considerations of suitability should be incorporated very early in the process and throughout the time leading up to the development of these entitlements. Primarily, the expectation is that subdivisions are implementing City land use tools. The City could investigate changes in land use tools that guide development and would result in more suitable development in the future. A regulatory change like this would be a next step in the process started with the adoption of the concept of *Focus Inward*.

Transition to Focus Inward Development not Immediate

One of the purposes of the suitability assessment was to determine where the low-hanging fruit for new development is - that is to say where, based on the location of existing services and infrastructure, development *should* go. It is far more efficient to add new dwelling units to existing neighborhoods with infrastructure in place than to build new ones. However, it may be a gradual, iterative process to transition from development primarily occurring in greenfield areas to development primarily as intensification in use of developed land (infill).

Conclusion

This assessment provides a baseline of development by suitability. Any shift in the pattern of development will be seen in future versions of this report, which should help indicate whether any implemented regulatory changes are producing the desired results.

Master Planning

A limitation to this approach is that it does not incorporate the greater community benefit of development in areas that have been master planned. Some of these areas may not be identified as suitable before they develop, but because they are incorporating best planning practices, they will end up being sustainable developments that will meet the goals of the Growth Policy once they develop. One of these such master-planned areas is the Sx^wtpqyen Area. There was not substantial development in this area during the study period of 2018-2020 but it is expected there will be much more development there in the future. For this reason, it is important to keep in mind the specific applications of this Suitability Tier approach. The location of existing infrastructure and services is an important lens through which to view development, but it is not the only one. Future assessments may benefit from an additional lens to account for locations where development is desired even though the necessary services and infrastructure are not yet in place.

Another side of the development planning challenge is that in reality the aspiration to Focus Inward will not be able to shape how all development occurs. Even with major regulatory changes, it is not expected that all development will be able to occur in places that already have access to parks, transit, and commercial services. There also needs to be planning for the manner of development when greenfield development does occur. Is development dense enough to enable transit to serve an area? Will parks be close enough so that most people can walk to them? Will residents have access to commercial services without needing to use a car?

Missoula has wonderful existing neighborhoods. At the pace at which the City is growing, it is important that more notable, desirable, distinctive places are added. Those are places that people want to live as well as the places that will be more financially feasible for the City to provide and maintain services to in the long-run. Suitability Tiers are useful in assessing where these places already exist. In order to add new ones, the City will need to proactively plan what types of developments are desired and where they should go.

Acknowledgments

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