

Yellowstone Business Partnership  
Seasonality Project, Southwest Montana Subregion

Commuter Transportation Needs



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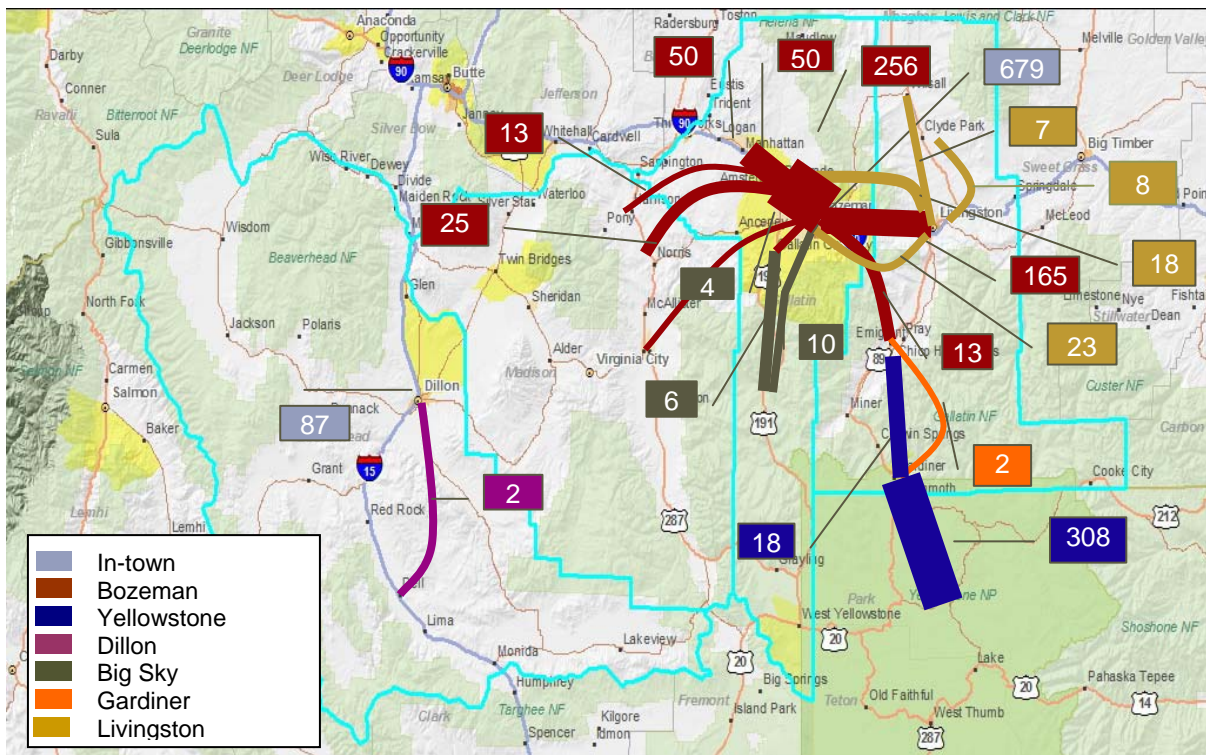
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# Executive Summary

This report conducted for the Yellowstone Business Partnership is one of six economic development projects conducted across the Greater Yellowstone region. This report focuses on commuter transportation across southwest Montana incorporating Beaverhead, Madison, Gallatin, and Park Counties. Because of the principal commuter patterns from Park County, Yellowstone National Park is also included in the analysis

Commutes and perspectives from employers and employees were solicited via web-based surveys. Participation of large employers in each county was solicited using the regional employer survey. The employees of those employers were then surveyed using the regional employee survey. This information was supplemented in the Bozeman area with a short survey sent to all Chamber of Commerce businesses. The survey results identified commuter patterns in the region, documented existing strategies to promote alternate transportation, quantified the region’s perception on commuter cost, and gauged the willingness to fund transportation.

An affordability index was developed using the data for major locations in the region by combining the housing and transportation costs.



Commuter flows between zip codes developed from the survey results reflects the function of Bozeman as the regional economic hub. The commuter flow map developed from employer data also shows a larger commuter flow from Manhattan and Three Forks than from Livingston. It also shows the commuter flow from the Gallatin Valley to Big Sky based on full-time employees. Similarly it shows commute to Yellowstone National Park from within the park, from Emigrant, and from Gardiner.

Dillon commutes are relatively minor; Madison County has few large businesses outside of Big Sky, hence we measured no major commuter flow. Based on a comparison between populations, employer commutes, and employee commutes, we have high confidence in our estimations of flows into Bozeman, Big Sky, and Yellowstone. We have lower confidences in our other estimates.

Other survey results showed a moderate interest in transportation issues. Employers ranked all presented elements of the impact of employee commutes on their business below neutral, although the larger and more remote employers rated issues higher than smaller businesses within Bozeman. Half of the employers were willing to pay something, but no employers were willing to pay more than \$80 per employee per month. In contrast 83% of employees were willing to pay something. A small percent (4%) were willing to pay more than \$80 per month. All of the employees willing to pay more than \$80 per month commute more than 35 miles one way. The amount responders were willing to pay is a small percentage of the actual cost of providing transportation. This leads to the conclusion that either businesses need to be educated about full cost of transportation or public transportation will have to continue relying upon public funding.

Given this difference, the report includes a discussion on the hidden costs of transportation. Individuals rarely consider the costs of car ownership, maintenance, and depreciation when they estimate their commute costs using a car. They also have the perception that fares cover most of the cost of public transportation. In southwest Montana the cost of a parking spot is hidden from the driver.

We ran calculations on one of those hidden costs: housing and transportation. We compared costs of living in different locations, working in Bozeman, and commuting in a single occupancy vehicle. We found that the most affordable choice for a median renter is to live in Bozeman. A home owner that paid the 2007 median home price would find it more affordable to commute from Livingston, although we lacked confidence that the median home price reported for Livingston was accurate. If a family working in Bozeman can walk, bike, bus and carpool to live with one car instead of two it can save between \$6,800 (Bozeman) to \$11,000 (Big Sky) per year. These calculations reinforce that affordability of a location is not just based on housing prices, but should also transportation costs.

Our research identified the travel patterns of commuters started identifying the perspectives of employers as it relates to transportation. The impact of this project was evident from the provider discussion, where individuals agreed to cooperate and think regionally.

We conclude that a next step would be the funding of a regional coordinator to help improve the regional system within the existing funding. The Yellowstone Business Partnership's larger concept of a Greater Yellowstone transportation cooperative incorporating Montana, Wyoming and Idaho will help create the transportation network that should serve the region, but as an in between step, more can be accomplished through regional coordination among the agencies.

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# 1 Introduction

*During the winter of 2007/2008 members of the Livingston community recognized commuter service to Bozeman as the top priority in their transportation coordination plan. Subsequently, Montana State University (MSU), the largest employer in Gallatin County, approached Bozeman's Streamline transit system to start this service. Various meetings between Streamline officials, the Livingston Transportation Advisory Committee, Yellowstone National Park, and MSU Bozeman resulted in a bare bone system to test the efficacy of a commuter bus service. Using buses borrowed from Yellowstone, the MSU contribution of \$35,000 allowed for a year of service consisting of one run in the morning from Livingston to Bozeman with a return trip in the evening.*

*Service began on October 13, 2008 with 9 passengers. By the end of that week, every seat on the 23-passenger bus was taken. In the five weeks the service has been in place, the bus has been at or near capacity almost every day.*

We narrate this story to highlight the relevance of this study in identifying the transportation needs of commuters in the region. The Yellowstone Business Partnership (YBP) selected Current Transportation Solutions to assess the commuter public transportation needs in Southwest Montana. The main intent of this research project is to provide an informational foundation for improved rural and commuter transportation connections.

The research is a part of YBP's *Turning on the Off-Season Project*, funded largely by a \$150,000 USDA Rural Development grant. Six sub-regional groups cover the 25 counties surrounding Yellowstone and Grand Teton National Parks. Each sub-region received \$10,000 to study a topic of its choice. The Southwest Montana sub-regional group identified commuter transportation as the focus of study for the region.

For Southwest Montana the research focuses on commuter patterns and employer willingness to help support alternatives to driving alone. This includes taking a bus, carpooling, biking and walking. The study focuses on employers and employees, and transportation operators scattered across Park, Gallatin, Madison and Beaverhead counties, including Yellowstone National Park (YNP) (see Figure 1).

To collect information, we surveyed different groups involved in transportation issues, including employers, employees, and providers. The largest portion of the study was a web-based survey of employers and employees. In addition, we held a meeting of regional transportation providers to increase communications and to encourage simple, low-cost ideas to improve regional services. The results are presented in this document, intertwined with a discussion of economic issues, institutional issues, and regional descriptions.

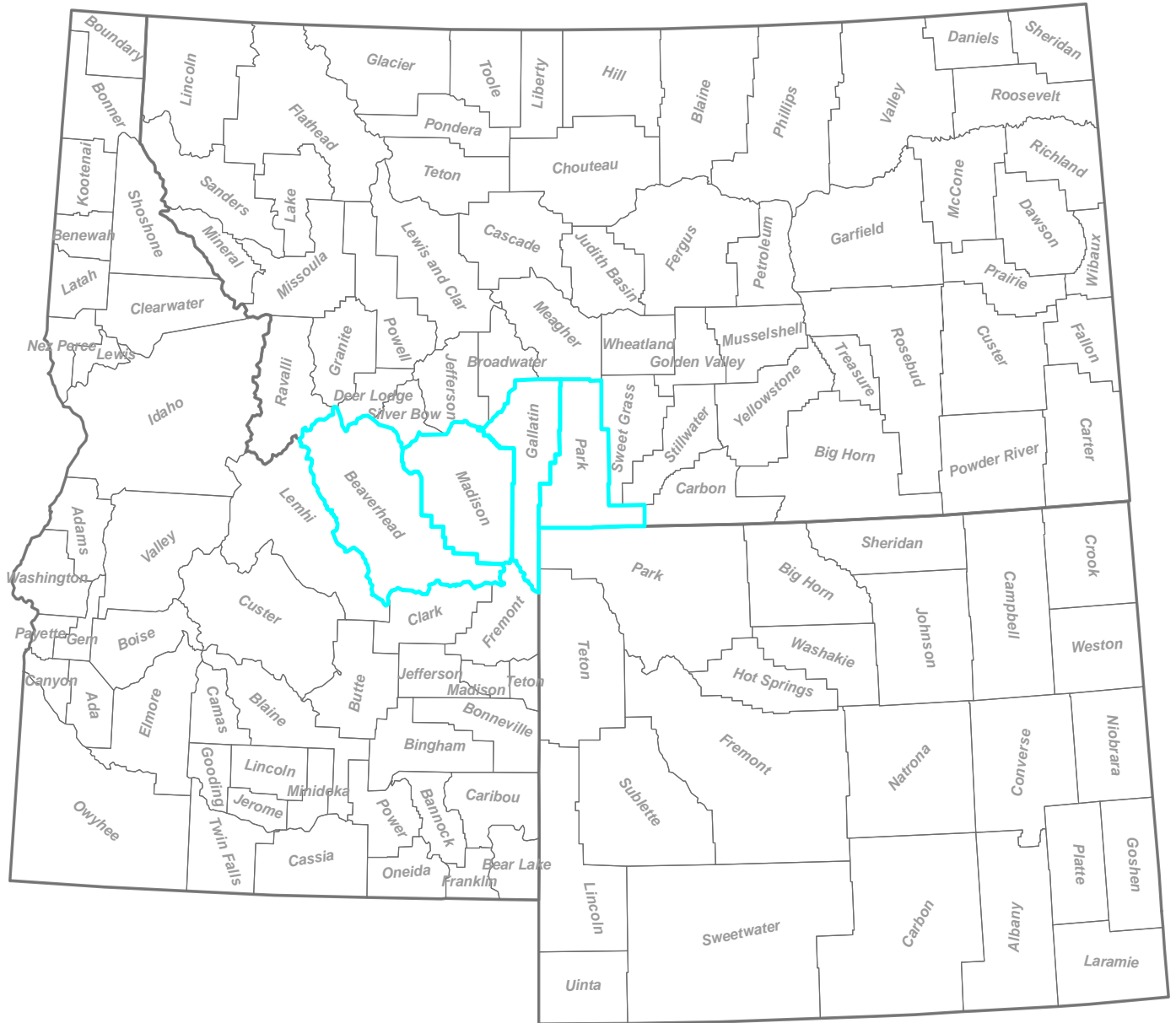


Figure 1: Southwest Montana regional map

## 2 Economic and Institutional Context

To understand the opportunities, importance, and limitations for expanding commuter options in southwest Montana, it is useful to understand a broader picture of transportation’s relationship to economic development and the institutional framework for the alternative mode that requires significant ongoing operational investment, public transportation.

## 2.1 Economic Development

Because this project is an economic development study, we outline the language of economic development and discuss the relationship with transportation. One definition of economic development is,

“to improve the economic well-being and quality of life by creating and/or retaining jobs and supporting or growing incomes and the tax base.”

This can be accomplished through: government undertaking to meet broad economic objectives (e.g. monetary policies); providing infrastructure and services; and creating or retaining jobs.

Considered in relation to transportation, this study assumes three contributions to economic development. First are the effective income issues related to housing prices and the related transportation costs, including both time and financial costs. This is interlinked with healthy living and natural environment issues such as air quality, energy use, carbon emissions, view sheds, water quality, and wildlife corridors. For some commuters, access to reliable, affordable transportation allows them reliably show up to work. This first economic development issue is tied to commuters and, if properly addressed, can effectively increase income by decreasing employee costs.

The second transportation economic development issue relates to aging in place and independent living. Transportation for seniors and people with disabilities decreases societal costs of more expensive living and health care options by providing access to health care, social services, and shopping.

The final issue for our region relates to sustaining or increasing the recreation and tourism economy while sustaining or reducing the tourist and recreation environmental footprint. The natural environment impacts mentioned earlier are also tied to this tourist transportation issue.

This research focuses on the impacts to the commuter.

## 2.2 Layers of Transportation

The meaning of transportation for people who live in rural areas varies widely. For everyone, the ability to access personal, public, pedestrian, or bike transportation is fundamental to connect with employment opportunities, health and medical services, educational services, and the community at large. Quality public transportation, bicycle lanes, pathways, and sidewalks also improve the livability of a community and encourage a healthy lifestyle. Bus service includes charter services, intercity services, general public transportation (also known as community transportation), and human service transportation. Vanpools, like carpools, allow groups of people to share a ride, but a public transportation provider or an agency can own the van organizes the riders. The appropriate mix of modes for a community depends on the community properties, funding, and the groups of people who will use the service.

Given the limited resources, most rural communities provide public transportation to those who have no other choice. But outside the human service world, planners, elected officials, and the general public often expect bus service similar to what is found in cities, like the type of service Streamline and Skyline offer in Bozeman and Big Sky.

The “transportation disadvantaged” include people with disabilities, people with low incomes, and seniors. This group of riders must flex their schedule to use transportation because they have no other choice. A sizable portion of Southwest Montana, Census 2000 counted 10,532 people 65 or older, 9,278 people with disabilities, and 12,861 people living below the poverty line of the 99,578 people living in the region. As the American population ages, and the income gap between the rich and poor continues to grow, we expect these numbers to grow.

By comparison, choice riders can take public transportation or drive themselves (assuming they can afford the gas). For a service to attract these riders, it must be convenient, attractive, and cost effective. Groups of choice riders include:

- College students
- Commuters
- Recreation riders: skiers, summer tours, and tourist shuttles.

Some would like to see the riders pay for the full cost of the transportation service, but the distorted marketplace does not encourage this (see Section 6, page 36) Instead, government and local businesses provide the funding for rural transit in southwest Montana.

## 2.3 Involved Institutions

Community transportation operations and funding becomes very complicated. The spaghetti diagram shown in Figure 2 shows the 62 federal programs that the Congressional Office of Management and Budget identified that have transportation funding programs for the human service portion of community transportation. Layered onto the federal funding sources are the state and local governments, the transportation providers, and the supporting social services. The person looking for a ride and the organizations offering rides can get lost in the complexity of navigating through this. This level of complexity also lies as an obstacle for commuter or tourism transportation and as an obstacle to working with businesses.



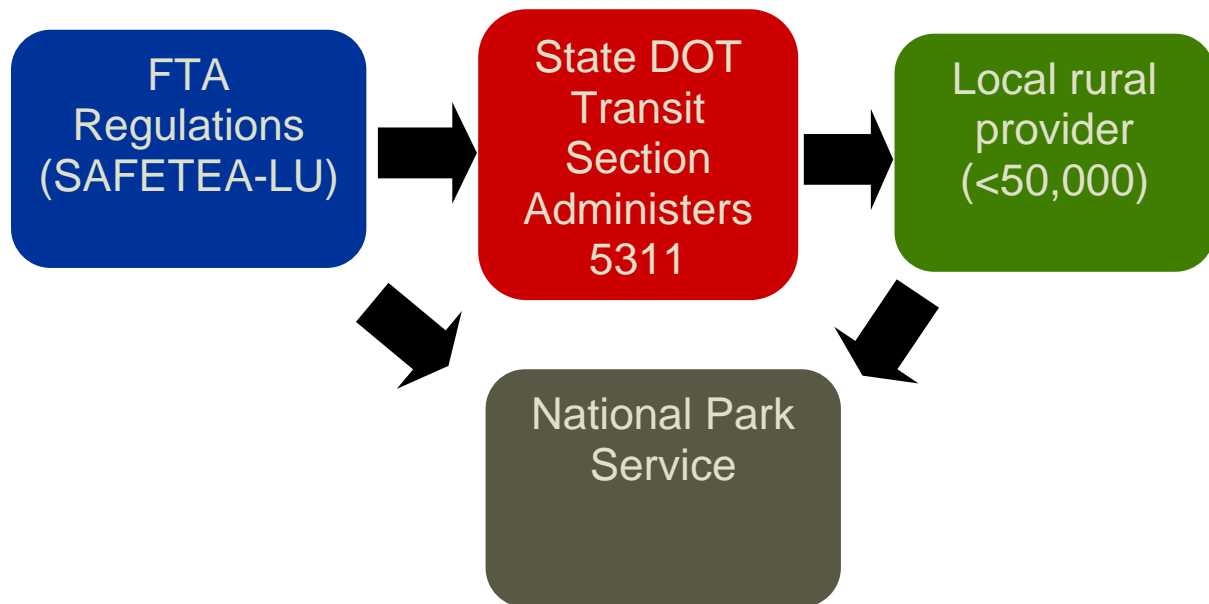
The largest funding source is the Federal Transit Administration (FTA). The FTA has several key programs. In Montana, the program that provides funding to rural (less than 50,000 people) general public transportation systems, known as the FTA Section 5311 program, is administered by the Montana Department of Transportation (MDT). Figure 3 summarizes the principal funding model for rural transportation.

The national parks also work through these complexities. If Yellowstone or Grand Teton were to offer bus service using government investment, they would either work with a local provider and the 5311 program to run the service, or they would receive funding directly from the FTA's Alternative Transportation in the Parks program (Section 5320). Besides these programs, all services need to be in line with the mission of the park, the Federal Lands Highway Program, and the Department of Interior. Currently, all tours and shuttles in the parks are run by concessionaires with no public funding.

Through the Surface Transportation Bill (or "Highway Bill") that was passed by Congress in 2005, known as SAFETEA-LU (Safe, Accountable, Flexible Efficient Transportation Act – a Legacy for Users), Montana saw its allocation of Section 5311 funds increase from approximately \$1.8 million in FY05, to nearly \$6.2 million in FY06. Funding is scheduled to increase through FY09 to 7.4 million dollars. This increased funding resulted in the growth of transit in Montana, from 8 public rural providers to around 30. This latent demand for services has led to the expenditure of the entire increase, resulting in the available federal funds being less than the statutory match provision.

When adequate funds are available, the FTA can cover roughly 54 percent of the cost of operating the transit system. Other programs can fund 80-86 percent of the cost of capital purchases (buses, bus shelters, vehicle storage facilities, etc.). The balance of funds for operations or capital must come from "local" sources, which includes non-transportation federal, state, county or city, business, and community funds.

The funding and operations environment shows the complexity and difficulty in building a cohesive, cost-effective transportation system that meets the community needs.



**Figure 3: Transportation funding model and agencies**

### 3 The Region

The study region includes Beaverhead County, (home to Dillon and the University of Montana Western); Madison County (Ennis and Virginia City), Gallatin County (Bozeman, West Yellowstone, and Big Sky), and Park County (Livingston, Chico, and Gardiner). Yellowstone is also included in the study area because of the proximity between park headquarters and Park County. Figure 4 shows the region with its mountains, roads, and federal lands. The green areas indicate the federal lands, while the colors in yellows to orange show population density. Most of the population is in Bozeman and the Gallatin Valley.

Bozeman is an outdoor-oriented college town with a strong tourist economy. It attracts new residents from out-of-state, leading to high housing prices and the perception that ordinary Montanans can't afford to live in Bozeman. The demographics and both support and contradict this description.

Bozeman ranks 8<sup>th</sup> out of 577 micropolitan areas nationally (top 1%) in economic strength (Prospera 2008). Conversely it has a 20% poverty rate, highest among Montana's 7 cities and comparable to a statewide 15% poverty rate and a national 12% rate (Census 2000). Bozeman's average wage per job is ranked 6th of the seven metropolitan and micropolitan areas in the state, ahead only of Havre (U.S. Bureau of Economic Analysis 2006). These contradictory facts and impressions may be caused by the college students and the high number of people with a college degree (50% compared to 24% in Montana and the nation). As described in the Prospera Business Network's *2008 Economic Profile*, "fewer jobs exist that require a Bachelor's degree than there are people with such degrees", resulting in a low annual wage.

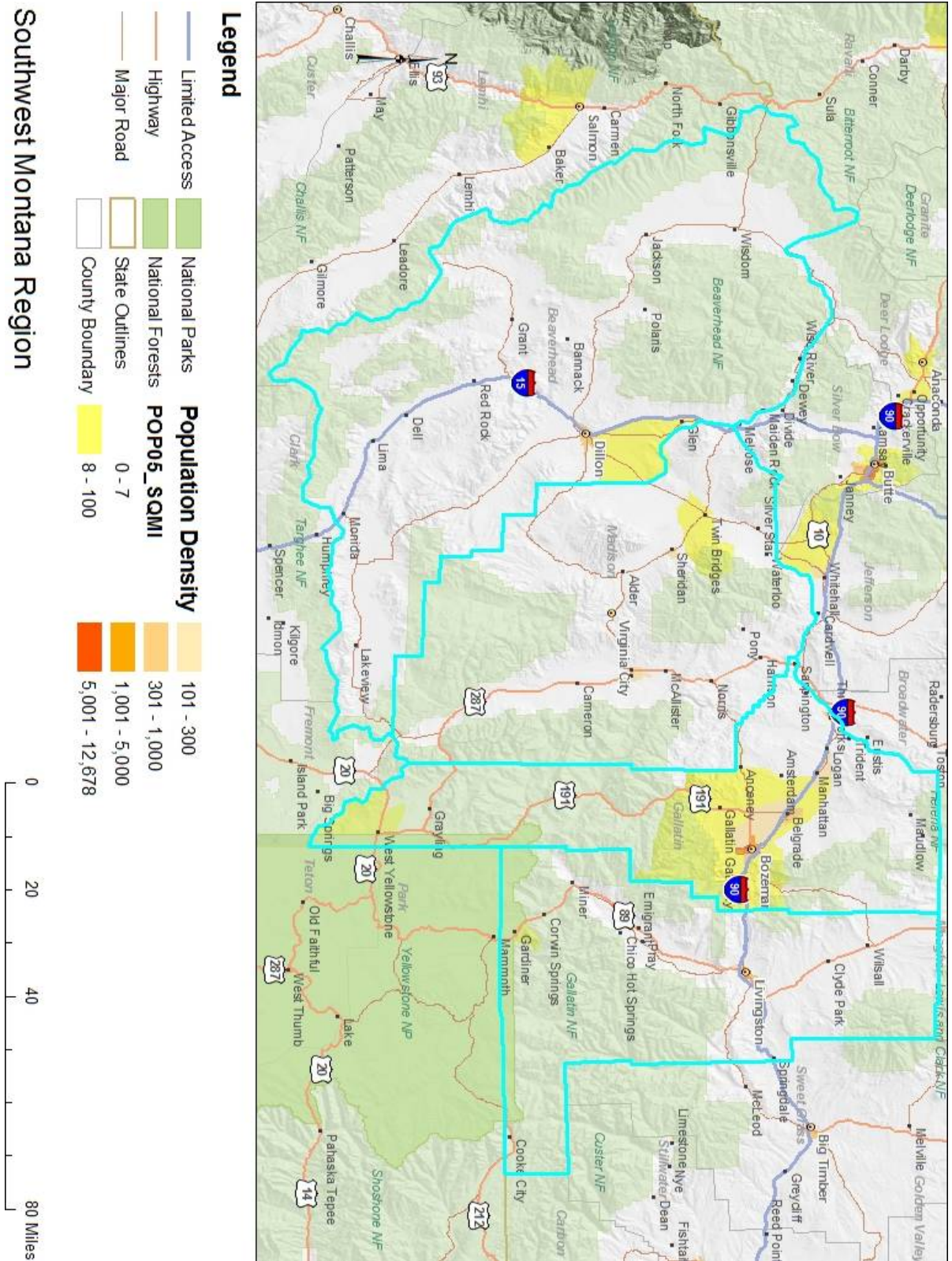
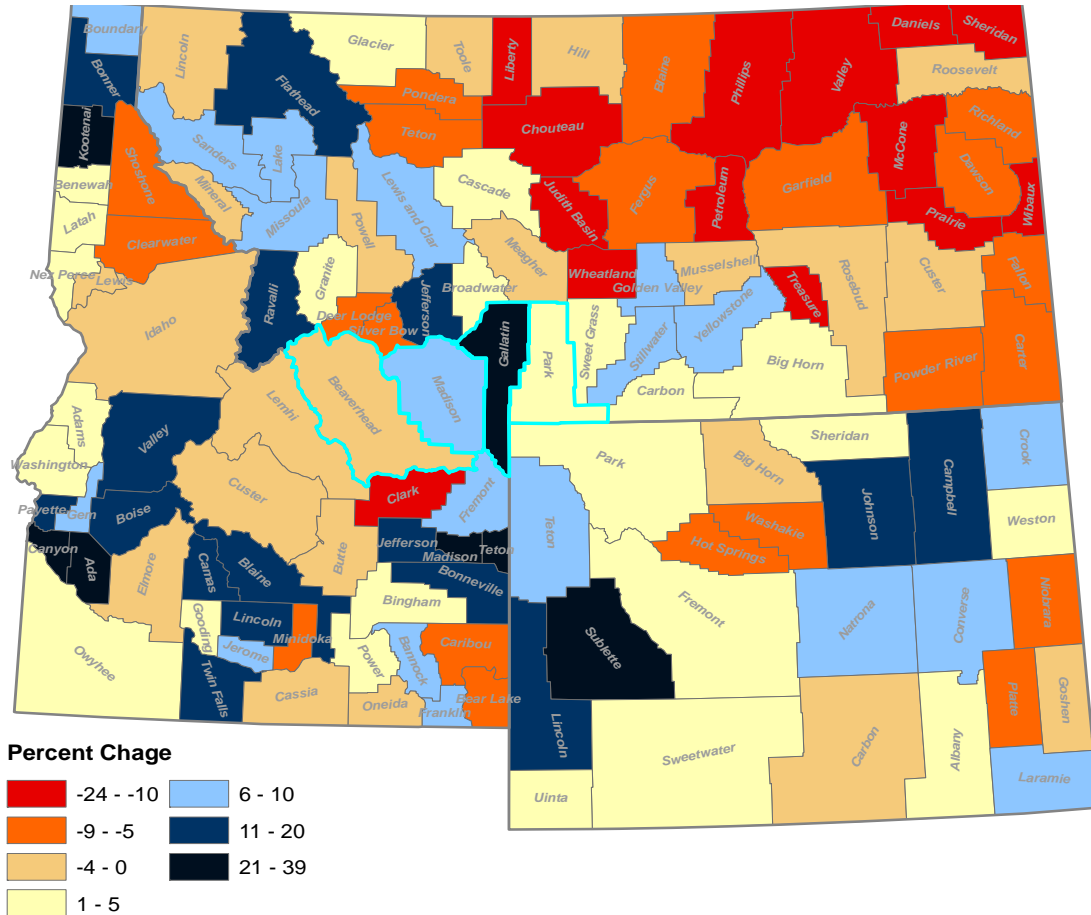


Figure 4: Regional map with population densities and public lands

Figure 5 shows the counties in the three states with population changes between 2000 and 2007. The red and orange counties are losing population; the blue and dark blue counties are gaining population. In our four counties, Beaverhead is losing population; Park has a slight increase; Madison County is growing briskly, and Gallatin County is the fastest growing county in the state. Considering some of the economic growth indicators mentioned before, some of the strength in economic health can be attributed to the real estate boom in the region.



**Figure 5: Population growth in Southwest Montana region**

Yet the rapid growth also poses challenges, with infrastructure lagging behind the growth and an inadequate tax base to cover the whole cost of infrastructure. For bus service, current funding sources do not allow expanded service when new subdivisions are built. As an example, when Streamline started service in Bozeman in year 2006, different housing subdivisions were also being rapidly developed northwest of town and west of town. By the end of year these subdivisions were completed and Streamline office was flooded with requests to extend routes to cover these new subdivisions. It was not until June 2008, where Streamline could manage public funds to modify the routes to offer bare-bones service in these two areas.

Transportation services are designed within the constraints of funding to serve the communities of Southwest Montana.

## 4 Summary of Services

The region has a network of transportation services with varying levels of visibility. Streamline/Galavan provides general public transportation in Bozeman, Belgrade, and Four Corners. Angel Line provides dial-a-ride transportation to seniors and people with disabilities in Park Counties. Hollowtop Senior Center in Madison County offers general public dial-a-ride service with trips to Bozeman and Butte. West Yellowstone Foundation operated Galavan West, which provides twice a week senior and disabled transportation to the people of West Yellowstone primarily to come to Bozeman. Dillon has a service that provides rides to seniors and disabled in and around the city of Dillon.

The private sector offers another level of service beyond the public services. Park County Transportation provides transportation to Gallatin Field. Greater Valley Cab offers taxi services in Bozeman and the Gallatin Valley. Livingston Taxi was offering taxi services in Livingston until the recent death of the proprietor. Karst Stage and First Group (formerly known as Laidlaw) provides charter services. Rimrock and Greyhound offer intercity services along I-90.

Some human service and medical facilities offer transportation to their clients. These agencies sometimes have needs beyond the transportation they provide. These include Counterpoint, Inc. (7 vehicles), Evergreen Health & Rehabilitation (1 non-accessible vehicle), New Horizons Assisted Living (1 non-accessible vehicle), Western Montana Mental Health Center (1 non-accessible vehicle), Frontier Assisted Living (1 non-accessible vehicle), Reach, Inc., and Love INC.

The hospitals across the region have patients and employees who need transportation.

Other organizations with transportation needs or interests include:

- Yellowstone National Park
- Montana Independent Living Project
- Printing for Less
- Montana State University
- University of Montana Western
- Montana Independent Living Project
- Major public and private employers
- Moonlight Basin
- Big Sky Resorts

The transportation providers are described in more detail in the following subsections.

### 4.1 Streamline / GALAVAN

Streamline provides fixed route public transportation in Bozeman and Belgrade with complimentary demand response service through GALAVAN. Streamline is a partnership between the Human Resource Development Council District IX (HRDC) the parent organization of GALAVAN (the Gallatin Area Van) and the Associated Students of Montana State University (ASMSU).

Streamline began operations in August 2006 by combining the fixed route (but seasonal) service of Bobcat Transit, with the demand responsive service of GALAVAN. By leveraging the funding of these two organizations, Streamline is able to obtain Federal money through the Federal Transit Administration (FTA) Section 5311 program. The FTA section 5311 program provides approximately 54 percent of the operational funding annually and 86 percent of the capital funding for Streamline.

Services included in the Streamline budget are:

- Fixed Route / Deviated Route
  - Daytime (Fixed Route)
  - Latenight (Deviated Route)
  - Bridger Bowl (Deviated Route)
  - Saturday service (Fixed Route)
  - Livingston commuter (Fixed Route)
- Demand Response – GALAVAN
- Reach

#### Streamline Schedules

Streamline daytime service runs four routes. The Greenline connecting Belgrade to Bozeman runs 6 times per day. The Redline, Yellowline, and Blueline in Bozeman run one-hour routes between 7:00am and 6:40 pm five days per week. Rides are free on Streamline.

In FY 2008 Streamline added Latenight service and a weekend Bridger Bowl route. Latenight runs on Thursdays, Fridays, and Saturdays, while the Bridger Bowl service runs during ski season. FY 2009 brought two additional services. Two routes run on Saturday from 8AM to 5PM. A minimum Livingston commuter service started on October 13, 2008.

Routes are adjusted annually to accommodate comments from riders, with new schedules beginning in August. Streamline would like to add the following services.

- Additional in-town route
- Longer weekday service
- More frequent service during peak hours
- Sunday service
- Airport service

#### System Ridership

In Fiscal Year 2008, the Streamline/ GALAVAN/ Headstart/ Reach partnership provided 203,000 rides. Streamline daytime has provided 140,000 of those rides. Because of the full year of service (compared to a start in mid-August last year) and increased daily usage, daytime ridership is 86% higher than FY 2007. A comparison of ridership by week between the years is shown in Figure 6.

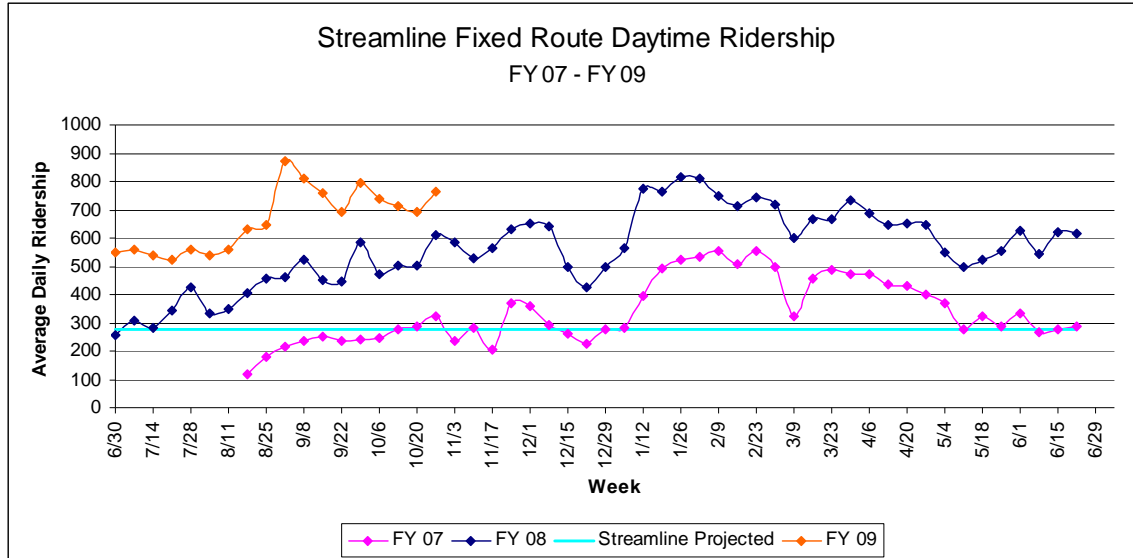


Figure 6: A comparison of daytime fixed route ridership.

The remaining rides are provided by the new Latenight and Bridger Bowl services, Galavan, Headstart, and Reach. Since Latenight began service, the Bozeman and MSU police departments have issued 40% fewer citations for driving under the influence. Latenight has also increased nighttime activities for passengers with disabilities.

### Galavan

Galavan’s mission is to ensure that lack of affordable transportation is not a barrier to individual independence. In operation since 1973, GALAVAN first began as the Retired Senior Volunteer Program’s “Mini-Bus”. The Mini-Bus was used to transport volunteers from the valley into Bozeman work sites. In the late 1970’s, the service became the Senior Transportation Service, operated by Thrift Stations. In 1984, when Thrift Stations could no longer keep up with the demand for service, the Human Resource Development Council District IX became the program’s sponsor.

When HRDC took over the Gallatin Area Van program, it shortened the name to the present GALAVAN. Later HRDC developed an in-house agreement so that GALAVAN would provide transportation for the Head Start program. When Galavan joined forces with Streamline in 2006, Galavan became Streamline’s paratransit service as required by the Americans with Disabilities Act.

Galavan provides service to residents of Bozeman and the surrounding communities. Galavan partners with Streamline for Latenight service on Thursdays, Fridays, and Saturdays. Pre-arranged drop-off and pick-up is available within ¾ mile of the Latenight bus routes for seniors or persons with disabilities who are unable to access the regular stops.

Galavan is open to anyone over 59 or with a disability. Eligible riders can call 587-2434 by 3:00 PM the day before your trip to schedule a ride.

Many seniors and people with disabilities are able to use the regular Streamline fixed route system; the Galavan office offers assistance in understanding how to use Streamline. Galavan is dispatched out of the Bozeman Senior Center, 807 North Tracy in Bozeman.

## 4.2 Skyline

Skyline is the new public transportation service that operates in Big Sky with daily service to and from Bozeman. The Gallatin County-Big Sky Transportation District, which had previously operated the “Snow Express”, started Skyline in December 2006.

Snow Express previously operated from mid-December to mid-April to enhance access for visitors within the Big Sky area. Skyline is now a year-round service, and it provides a vital connection between Big Sky and Bozeman, known as the “Link”. Since operations began, Skyline has provided more than 90,000 rides within Big Sky, and 14,000 rides between Big Sky and Bozeman.

Funding for Skyline comes from the local option sales tax in Big Sky and FTA Section 531 funds, which are administered by the Montana Department of Transportation. In FY 2007, the Link also received support from Moonlight Basin resort. Skyline buses feature bike or ski racks, depending upon the season. Route and schedule information is available at [www.skylinebus.com](http://www.skylinebus.com).

## 4.3 West Yellowstone Foundation

The West Yellowstone Foundation operates between West Yellowstone and Bozeman twice per week, named Galavan West, primarily carrying seniors to shop and see doctors in Bozeman.

## 4.4 Madison County Transit (Hollowtop Senior Center)

Madison County Transit provides service in Madison County, including the communities of Ennis, Harrison and Pony. Madison County Transit currently provides service to Bozeman three times per month, with service once a month to Butte.

## 4.5 Beaverhead Senior Center

The Beaverhead senior center operates the senior van in the city of Dillon, which provides transportation services to seniors and disabled on Monday, Wednesday, Friday mornings and Tuesday, Thursday afternoons.

## 4.6 Angel Line

Angel Line’s mission is to ensure that lack of affordable transportation is not a barrier to individual independence. In operation since 1993, Angel Line began operation when the City of Livingston asked Park County to join with them and the Montana Department of Transportation to obtain affordable transportation for seniors in Park County.

Angel Line provides service to residents of Livingston and the surrounding communities. Angel Line is open to anyone 60 or older and to anyone with a doctor’s letter of disability. Eligible riders can call 222-4668 the day before their trip to schedule a ride. Angel Line is dispatched out of the Senior Citizens Center of Park County, 206 South Main in Livingston.

Angel Line has the following hours of operation

- Livingston - five days per week (M-F) 8:15 AM to 4:15 PM.
- To outlying communities in Park County: as needed
- From Livingston to Bozeman: 2nd Wednesday of the month, departing at 8:15 AM and returning at 4:15 PM. Additional trips to Bozeman may occur if medically necessary

Angel Line provided an average of 670 rides per month to 75 individual customers during winter 2007-2008. Vehicles travel 2,067 miles per month. The cost per ride and cost per mile are in line with other Montana providers.

**Table 1: Ridership Statistics by Month**

	Rides	Trips to Bozeman	Unique Customers	Miles driven	Cost per Ride	Cost per Mile
Sep-07	689	2	75	2,085		
Oct-07	734	3	83	2,193		
Nov-07	679	1	76	2,252		
Dec-07	702	1	77	1,938		
Jan-08	687	1	76	2,104		
Feb-08	529	1	63	1,828		
Average	670	1.5	75	2,067	\$ 10.08	\$ 3.32

## 4.7 Karst Stage

One of the largest providers of transportation services in southwest Montana, Karst Stage is a charter provider, with some scheduled service to Big Sky, West Yellowstone, Chico and Mammoth during the primary tourist season. The scheduled service is based primarily on flight arrival and departure times from Gallatin Field (located in Belgrade). Karst is the contractor providing service for Skyline, the Big Sky public transportation service.

Karst Stage serves a diverse set of customers through its charter coach operations. They can be local or attending a conference from far away, public or private, recreational or not recreational. The airport shuttle operation is based out of Gallatin Field and disperses passengers to and from locations within a 150 mile radius of the airport. Many of these routes, as well as the Skyline system routes, are scheduled, but we fill needs that are not considered to be scheduled service.

Karst Stage provides charter transit service across Montana. The firm operates over-the-road coaches, transit buses, school buses, and mini-buses for several different types of contract services throughout southwest Montana.

Karst also owns 4 x 4 Stage, which operates 12 vans to and from the Gallatin Airport to several scheduled destinations throughout southwest Montana. This includes service to Big Sky, West Yellowstone, and Mammoth.

## 4.8 Greater Valley Cab

Greater Valley Cab replaced All Valley Cab in 2007. Greater Valley Cab provides on-call taxi service daily from 4:00 a.m. to 2:00 a.m. with 24-hour reservations. The company serves the Bozeman, Belgrade, Manhattan, and Three Forks areas. The fleet consists of four sedans and four vans.

## 4.9 Livingston Taxi

Livingston Taxi began service in Park County in 2007. The taxi provides on-call taxi service daily 24 hours per day, 7 days per week, 365 days per year with 24-hour reservations. The company serves all places within Livingston and a 125-mile radius.

The license from the Montana Public Service Commission places the following limitations: (1) Transportation must originate or terminate in Park County, Montana. (2) Transportation to or from east of Park County, Montana must originate or terminate in the City of Livingston, Montana.

The operational status of Livingston Taxi is in question after the recent passing of its owner.

## 4.10 Park County Transportation

Park County Transportation is a preferred car service. With offices in Livingston, MT (and Cody, WY opening, May 2008,) service is provided in Livingston, Paradise and Shields Valley, Chico, Pray, Emigrant, Gardiner, Mammoth, Cooke City, West Yellowstone, Cody, WY and all of Yellowstone National Park. Airport service is provided in Bozeman, Butte, Billings, West Yellowstone and Cody, WY. Vehicles are new, air-conditioned, clean, 4 wheel drive, well maintained and equipped with satellite radios. Park County Transportation will provide reservations up to 6 passengers per vehicle.

Reservations are recommended 24 hours in advance by calling "**406-223-2020**". Park County Transportation serves a diverse set of customers through its car service, providing a quality service at a fair price. Visit the web site at: [www.parkcountytransportation.com](http://www.parkcountytransportation.com)

## 4.11 First Group

First Group Education Services in Bozeman is the current contractor for the Streamline transit service as well as the provider for the Bozeman School District home-to-school contract. First Group provides the weekend and holiday ski bus service from Bozeman to Bridger Bowl; the kid's bus uses school buses while the park & ride bus is provided through Streamline Transit using Streamline buses.

First Group is also a provider of private party charters in and around the Gallatin Valley and outlying areas. Charters to other states and areas are done on an individual basis according to the type of service need for each contracted event. Charters are provided on school buses. Federal regulations prohibit use of Streamline buses for charter services.

## 4.12 Bridger Bowl / Bohart Ranch

Bridger Bowl is a local community ski area 20 minutes from Bozeman. Bridger Bowl is committed to operating their ski area in the most socially responsible manner possible. Energy and product purchases,

waste stream management and care for the land will be conducted in an accountable manner consistent with prudent and environmentally sustainable practices.

Most local residents only have to drive 16 to 20 miles each way to and from Bridger. Consequently, the collective carbon footprint is significantly less compared to those traveling 3 to 5 times that distance to ski or recreate. Despite the close proximity to Bozeman, Bridger Bowl strongly encourages local residents to carpool whenever possible.

- They have a designated carpool lot for vehicles with 2 or more passengers in our top Lot A. They have also coordinated a carpool parking lot at the Gallatin County Fairgrounds (corner of Tamarack and N. Rouse) in Bozeman.
- Beginning in 2007-08 season was a free park and ride bus service between Bozeman and Bridger Bowl. The contracted service with Streamline and First Group for an Adult bus offering several round trips between Bozeman and Bridger Bowl. The Free bus service will be offered on weekends, plus school holidays for the Kid's bus.
- New for the 2007-08 season is an Bridger Bowl Employee bus which will be provided free of charge for Bridger employees seven days a week during the ski season.

### 4.13 Yellowstone National Park

Since 1999, Yellowstone has operated an employee shuttle from Livingston to Mammoth Hot Spring. The bus, donated by Idaho National Lab and running on a biodiesel blend, runs Monday through Thursday to meet the schedule of the largest portion of Yellowstone employees. Drivers are park employees who get paid \$32 per day. Riders pay \$4 to ride from Livingston, \$3 from Emigrant, \$2.50 from Tom Miner, \$1.50 from Corwin, and \$1 from Gardiner. The shuttle is open to employees, concessionaires, and their family members. In 2007, the shuttle gave about 9,158 one-way trips, or about 44 trips per day. As shown in Figure 7, the largest portion of riders are from Livingston (44%), composing 60% of the saved personal vehicle mileage if riders would have driven alone.

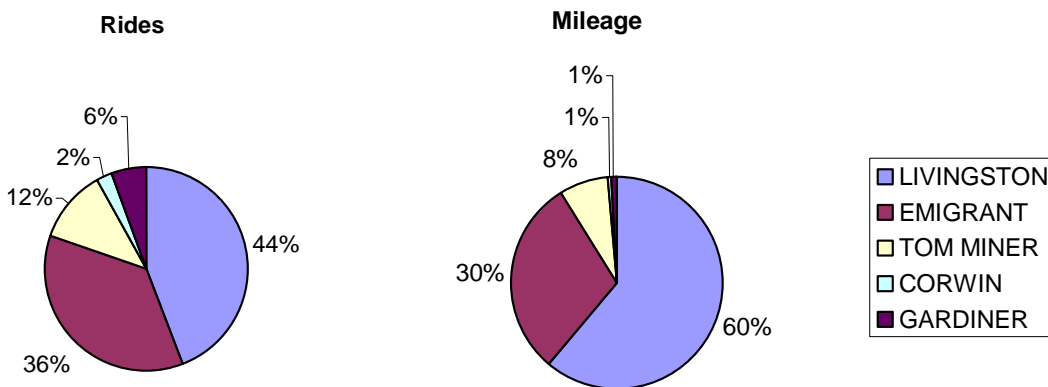


Figure 7: 2007 ridership distribution for Yellowstone employee shuttle.

The 2007 estimated carbon savings for the one bus that runs between Livingston and the park is approximately the same as the 2007 savings for the 4 Streamline daytime runs in Bozeman. The service accounts for 397,973 passenger-miles with an average passenger-trip length of 43 miles. The service uses approximately 3,940 gallons of fuel per year. If the riders had driven alone instead of taking the bus, they would have used approximately 19,900 gallons of fuel, for a net savings of 16,000 gallons of fuel. This equates to approximately 388,000 pounds of carbon savings. By comparison, Streamline's net savings in 2007 was 389,000 pounds of carbon for their 132,600 rides and 4.9 mile average trip length.

Within Yellowstone, concessionaires offer a number of shuttles and tours including tours on the historic yellow buses.

#### 4.14 Reach Inc.

Reach supports adults with disabilities to attain their individual potential and aspirations. Reach Inc. is a private, non-profit organization operating in Bozeman, Montana that began providing services on April 4, 1974 to adults with disabilities. Starting from a small rented work center and an 8 person group home, Reach has since grown to serve over 100 people in the Gallatin Valley with varying disabilities. Reach provides vocational and residential community support for people with developmental disabilities and survivors of traumatic brain injuries. Developmental disabilities include mental retardation, cerebral palsy, autism and other neurologically handicapping conditions. These disabilities occur in the developmental stage of life (before the age of 18). Reach also serves adults with other disabilities such as brain injuries.

Reach offers three types of transportation services. Sheltered workshop transportation brings clients from the six group homes or other residences to the work center on the north side of town (already contracted with HRDC/GALAVAN). Day time supportive employment transportation carries clients to their jobs in the community. Finally, Reach group homes include residential-based transportation.

Client needs, transportation budgets, and levels of independence vary. Most Reach clients currently use Reach transportation services. Some clients also independently use GALAVAN. Some Reach clients are beginning to use Streamline. The people in residential homes who are most likely to use Streamline live at 307 S. 15th and 434 N. Tracy. The groups living at 50 & 54 Michael Grove and 5508 and 5512 Golden Valley Drive would be capable of using Streamline with travel training. Those living at 436 N. 3<sup>rd</sup> and 1127 N. Cedarview are least likely to use Streamline.

HRDC and Reach are working to expand consolidation between the two organizations. The two organizations feel right now that full consolidation would be very difficult given differing missions and the makeup of the clientele. If there was adequate funding, we could envision Reach staff riding with clients with fewer capabilities on a GALAVAN or Streamline vehicle. At this time we are working on consolidation through small steps. The Bozeman community is interested in learning of examples of full consolidation in other Montana communities (see Appendix for more details).

#### 4.15 Counterpoint Inc.

Counterpoint is a private, nonprofit corporation that has provided services to adults with disabilities in Park County since 1976. Counterpoint provides residential, vocational and transportation services to the individuals that it serves.

Counterpoint provides services to approximately 30 adults with disabilities who meet eligibility for funding through the Developmental Disabilities Program or who are referred to us by Vocational Rehabilitation. The majority of those individuals have a developmental disability which occurs during the developmental stage of life (before the age of 18). Developmental disabilities include mental retardation, cerebral palsy and autism. Counterpoint also serves adults with other disabilities, such as traumatic brain injuries.

Counterpoint values:

- individuality
- self respect and self worth
- personal choice and freedom
- community involvement
- comfort, health, and safety
- independence and self-reliance
- the expansion of experiences
- human potential
- equality in relationships with all people
- quality in the lives of our consumers.

Counterpoint contracts with the state of Montana to provide transportation to its clients. Rides are provided to medical appointments, stores, recreational areas, work sites, etc.

Counterpoint offers four types of transportation services. Sheltered workshop transportation brings clients from the two group homes or other residences to the work center in the downtown area. Day time supported employment transportation carries clients to their jobs in the community. Supported living transportation is provided to individuals who live in their own or their family's home in the community. Finally, Counterpoint group homes include residential-based transportation.

Client needs, transportation budgets, and levels of independence vary. Most clients currently use Counterpoint transportation services. Some clients also independently use Angel Line. The Supported Living residents would be most likely to use Angel Line. The people in residential homes who are most likely to use Angel Line live at 603 E. Milky Way Drive. Those living at 629 North 9<sup>th</sup> Street are less likely to use Angel Line, but residents of both homes may be capable of using Angel Line with travel training.

## 4.16 Love INC

Love In The Name of Christ (Love INC) mobilizes partner churches and their volunteers to find effective ways to serve individuals and families who find themselves in difficult circumstances and who need a helping hand. Serving individuals and households in Gallatin County, Montana, Love INC is a Christian, faith-based, non-profit organization designed to connect the human, material and spiritual resources of dozens of local congregations with individuals and families struggling in difficult circumstances. Since 1995, Love INC has responded to tens of thousands of requests for assistance, and has activated hundreds of volunteers, provided real help, restored hope, and transformed the lives of individuals and families in southwest Montana.

Love INC volunteers offer transportation for people who cannot comfortably be served by Streamline, GALAVAN, or Greater Valley Cab. Typical rides are to or from surgery or to a job interview. Because it is a volunteer program where messages are left on an answering machine, requests must be made at

least 48 hours in advance. Rides are available at any time, and requests must be made between 10 and 2. Love INC regularly refers requests to GALAVAN and cannot carry people in wheelchairs.

## 4.17 Head Start

HRDC's Head Start Program has been operating in Gallatin, Park, and Meagher Counties since 1991. Head Start is a free program that serves 168 children annually with a focus of providing for the healthy development of children and the strengthening of families. The program serves children with a wide range of developmental levels including children with special needs. This brings a greater degree of social competence to the children of participating families by maximizing their unique strengths and abilities which is the overall goal of our program. The program promotes parents as the primary educators of their children and supports them as an integral part of the Head Start program.

Until FY 2009, Head Start contracted with GALAVAN to provide transportation to its Gallatin Valley classrooms. Federal budget cuts have recently forced the Head Start program to discontinue this transportation service.

## 4.18 Greyhound / Rimrock

Greyhound Bus provides regional scheduled bus service along I-90 with stops in Bozeman and several other cities along I-90. Two buses run eastbound, and two buses run westbound. In addition, Rimrock Stages, a Trailways provider in Billings, provides scheduled service once a day in each direction between Missoula and Billings. The schedules are shown in Table 2 and Table 3.

**Table 2: Westbound Intercity Bus Schedule**

City	Greyhound		Greyhound		Rimrock		
	Arrive	Depart	Arrive	Depart	Arrive	Depart	
Livingston	2:55 am	3:00 am	2:40 pm	2:45 pm	3:20 pm	3:20 pm	
Bozeman	3:30 am	3:35 am	3:15 pm	3:20 pm	3:45 pm	4:05 pm	
Belgrade					4:20 pm	4:20 pm	Drop only
Manhattan					4:30 pm	4:30 pm	Drop Only
Three Forks					4:40 pm	4:40 pm	

**Table 3: Eastbound Intercity Bus Schedule**

City	Greyhound		Greyhound		Rimrock		
	Arrive	Depart	Arrive	Depart	Arrive	Depart	
Three Forks					8:05 pm	8:05 pm	
Manhattan					8:15 pm	8:15 pm	Drop Only
Belgrade					8:25 pm	8:25 pm	Drop Only
Bozeman	3:20 am	3:25 am	4:20 pm	4:25 pm	8:40 pm	9:00 pm	
Livingston	3:55 am	4:00 am	4:55 pm	5:00 pm	9:25 pm	9:25 pm	

## 4.19 Passenger Airlines

Gallatin Field is the 7th busiest passenger airport in the Pacific Northwest with over 650,000 passengers using the facility every year. The airlines, Frontier, Delta/Delta Connection, Horizon Air, Northwest, United Express, and Allegiant, provide daily non-stop service to, Denver, Minneapolis/St. Paul, Salt Lake City and Seattle/Tacoma. Depending on market conditions, the airlines also provide seasonal non-stop service to other destinations such as Detroit, Atlanta, San Francisco, Las Vegas, and Los Angeles.

## 4.20 Summary of Providers

The providers are summarized in Table 4.

**Table 4: Transportation Providers in Southwest Montana<sup>1</sup>**

Organization	Service Type	Service Times	Service Area	People Served	Reservation/ Times	Fare for Services	Contact Info
Streamline Transit	Fixed route public transportation	Monday to Friday 7am to 7pm	Bozeman, Belgrade, Four Corners, Bridger Bowl, Livingston	General Public	None	Fare free	587-2434 www.streamlinebus.com
GALAVAN	ADA paratransit demand response	5 days 7am To 7pm	Bozeman & Belgrade	Seniors and Persons with Disabilities	Reserve by 3pm previous day	Suggested Donation of \$1.25	587-2434
Skyline	Fixed route and demand response public transportation	7 days 6 am to 10 pm	Big Sky with the Link to Bozeman	General Public	None	Fare free	995-6287 www.skylinebus.com
West Yellowstone Foundation	Demand response public transportation	Tuesday and Thursday 8am To 6pm	West Yellowstone to Bozeman	General Public	Reserve In Advance	Suggested Donation of \$10.00	646-7600
Hollowtop	Demand response public transportation	As scheduled Monday to Friday	Madison County	General Public	Reserve In Advance	\$3.00 Round Trip	685-3225

<sup>1</sup> Costs subject to change due to changing fuel costs.

Organization	Service Type	Service Times	Service Area	People Served	Reservation/ Times	Fare for Services	Contact Info
Angel Line	Next day transportation for Seniors and Disabled	8:15am To 4:15pm Monday - Friday	Park County	Seniors and Persons with Disabilities	8 Hours	Suggested Donation of \$1.00	222-4668
Beaverhead Senior Center	[update]						
Bridger / Bohart Bus	Scheduled bus service via Streamline	Weekends and school holidays during ski season	Bozeman to Bridger Bowl, Bohart Ranch	General Public	None	Fare free	587-2111 www.bridgerbowl.com
Counterpoint Inc.	Services for adults with disabilities	24 / 7	Livingston area	Clients	N/A	N/A	222-2472
Livingston Taxi	Taxi service	7 days As Scheduled	Park County and all locations within 125 miles	Anyone	30 minutes	Mileage Dependant	222-7713
Park County Transportation	Airport shuttle	24 / 7 with 24 hour advance reservation	Park County & Yellowstone National Park	Anyone	Required 24 hours in advance	\$2 per mile for the first passenger + \$10 for each additional passenger	223-2120 223-2020
Karst Stage	coach tours, charters, airport shuttle, school bus and transit services	7 days As Scheduled	All Areas	Anyone	Recommended	Destination Dependant	556-3500 556-3540 www.karststage.com

Organization	Service Type	Service Times	Service Area	People Served	Reservation/ Times	Fare for Services	Contact Info
First Group	School bus; Streamline Transit; private party charters.	7 days per scheduled contracts and events	Greater Yellowstone area and to other states as requested	Anyone	Reservation required (charter)	Hourly fee or daily rate plus mileage (charter)	556-8039 ext. 202 556-8042 (fax) dana.piper@firstgroup.com
Yellowstone	Employee shuttle	Mornings and evenings, weekdays	Livingston to Mammoth	YNP employees only	NA	NA	Jim Evanoff 307-344-2311
Greyhound	Intercity bus service	7 days 2 routes per day in each direction	I-90 with stops in Livingston and Bozeman	Anyone	Purchase tickets at bus terminal, over phone, or at web page	Destination Dependant	800-231-2111 587-3110 www.greyhound.com
Rimrock Stages / Trailways	Intercity bus service	7 days 1 route per day in each direction	I-90 with stops in Livingston, Bozeman, Belgrade, Manhattan, and Three Forks	Anyone	Purchase tickets over the phone	Destination Dependant	800-255-7655 www.rimrocktrailways.com

## 5 Survey of Employers and Employees

Chapters 1 - 4 describe the transportation environment. Chapters 5 - 7 present the new information collected during this study. This information reflects the primary purpose of this project, to identify transportation needs for the commuter in the southwest Montana region.

To accomplish this, we used web-based surveys targeted at the ten largest employers in each county. Yellowstone National Park and its concessionaires were also included in the study because of the number of employees living in Park County. We added another employer survey when the Bozeman Chamber of Commerce offered to distribute a survey to all of its members if it was short. In summary, we conducted three surveys:

- Employer survey (referred to in this document as the long survey) – a 20-minute survey to be completed by human resource managers summarizing their transportation needs and the locations of their employees and customers.
- Employee survey – a 10-minute survey for the employees of the largest employers to identify the workers' specific transportation needs. This survey was also aimed at quantifying the different perspectives of employees with employers.
- Bozeman region employer survey (the short survey) – a 5-minute survey distributed to all Bozeman Chamber members. This resulted in a larger sample size with better representation from the small businesses that make up a large portion of our economy. All responses were from the Gallatin Valley. The survey left out the questions from the long survey that related to home locations of employees and customers. Because the core questions were the same, the results can be compared between employer types to provide more insight towards the variations in employer perceptions based on their size.

Employees could complete the survey on the web or on paper. By providing employees the option of staying anonymous, we hope for honest feedback without any fear of repercussions from employers.

### 5.1 Distribution

The long employer survey and the employee survey were distributed via email to participating businesses. Initially the local chambers of commerce across the region were contacted to facilitate the distribution of the survey. Some successful responses were obtained from Beaverhead County through their chamber, but the other chambers did not have adequate contact management systems to allow for automated survey distribution. As mentioned before, the Bozeman Chamber helped with survey distribution, but asked for a shorter survey for their distribution list.

With poor participation through the chambers, the research team contacted the largest employers in the region personally. For each of these employers, we called the human resource department to explain the details of the project and the request to complete the survey. Some of the businesses were enthusiastic about participating in the study, whereas others were not interested.

Once the employers agreed to participate in the survey, emails were dispatched with the details of the project and a web link to the survey, for both employer and employee. Employers were asked to distribute the employee survey link. The survey was created using the online survey application, Survey

Monkey. The survey tool is included in Appendix B. The employers who participated in the long employer survey and the employee survey are (by location):

- Madison County
  - Moonlight Basin, Big Sky - **waiting for response**
- Gallatin County
  - Bozeman Deaconess Hospital, Bozeman
  - ILX Lightwave, Bozeman
  - First Interstate Bank, Bozeman
  - Anderson ZurMuehlen & Co., P.C., Bozeman
  - Gallatin County (government), Bozeman
  - Right Now Technologies, Bozeman
  - Montana State University (employer only) - **waiting for response**
  - Big Sky Resort, Big Sky
  - Running Bear Pancake House, West Yellowstone
- Beaverhead County
  - USDA Forest Service, Dillon
  - Dillon Tribune, Dillon
  - Dragging Y Cattle, Dillon
  - University of Montana Western, Dillon – **waiting for response**
- Park County / Yellowstone
  - Livingston Health Care – **waiting for response**
  - Chico Hot Springs, Pray – **waiting for response**
  - Xanterra, Yellowstone (3 divisions)
  - Yellowstone National Park (employer only)

Figure 8 shows the number of responses by place of business. There were 57 responses from different employers. The employee survey had 289 responses, of which 247 provided a home zip code and are included in location-base analysis in this report. While we targeted an even number of businesses per county, we received the most responses from Bozeman and Belgrade. This reflects the concentration of businesses in the Gallatin Valley, the economic hub of the region. We compared our survey responses to the actual number of businesses and employees in Table 5. Note that the Bureau of Economic Affairs data used in this table underestimates the number of businesses and employees because it excludes government and sole proprietorships.

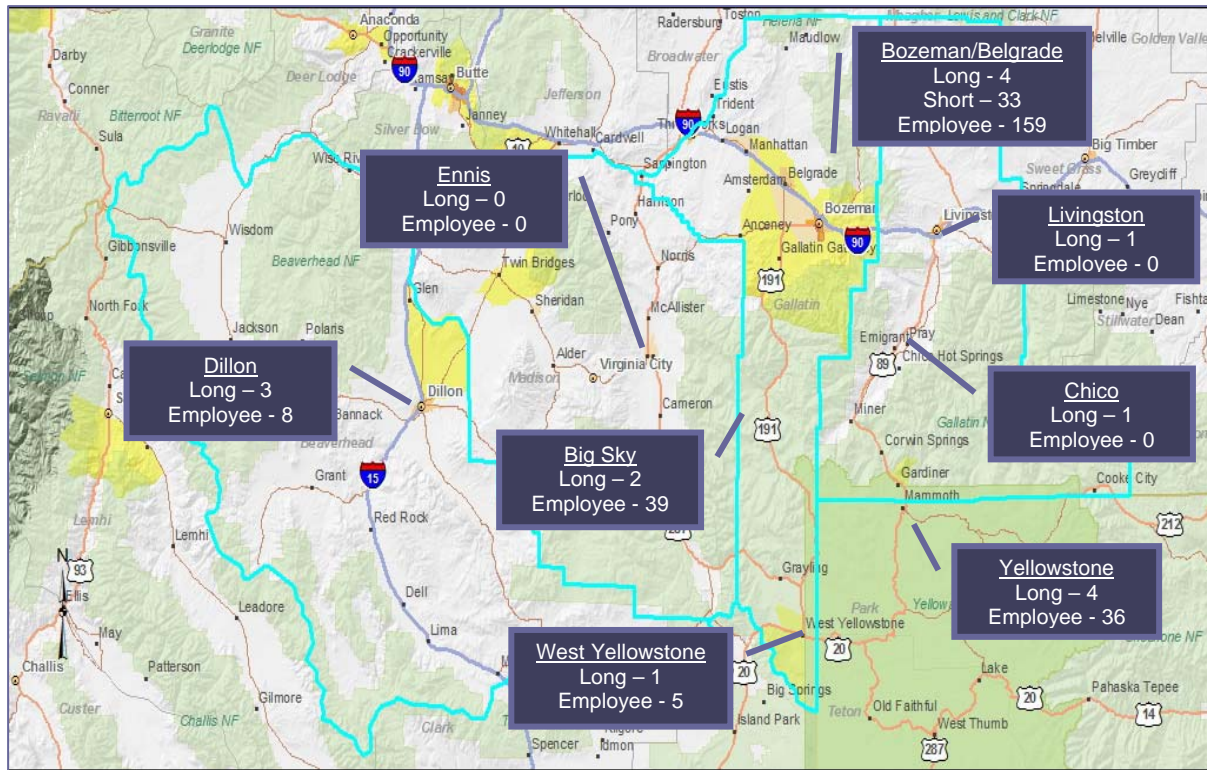


Figure 8: Survey responses by location.

Table 5: Employee Work Locations

Work Location		# of Establishments				# of Employees					
Zip	Community	Actual (BEA) <sup>1</sup>		Employer Surveys <sup>2</sup>		Actual (BEA) <sup>1</sup>		Employer Surveys <sup>2</sup>		Employee Survey	
<b>Gallatin County</b>		4,826	75%	65	87%	39,119	81%	2,520	77%	203	82%
59714	Belgrade	711	11%	3	4%	4,374	9%	12	0%	-	0%
5971x	Bozeman	3,281	51%	59	79%	27,678	57%	2,473	75%	159	64%
59730	Gallatin Gateway <sup>3</sup>	135	2%	2	3%	966	2%	20	1%	39	16%
59741	Manhattan	158	2%	0	0%	763	2%	-	0%	-	0%
59752	Three Forks	125	2%	0	0%	918	2%	-	0%	-	0%
59758	West Yellowstone	209	3%	1	1%	1,277	3%	15	0%	5	2%
	Other <sup>3</sup>	207	3%		0%	3,143	7%		0%		0%
<b>Park County + YNP</b>		896	14%	6	8%	5,370	11%	612	19%	36	15%
00075	Yellowstone	112	2%	4	5%	539	1%	612	19%	24	10%
59027	Emigrant	41	1%	0	0%	208	0%	-	0%	-	0%
59030	Gardiner	70	1%	1	1%	374	1%	-	0%	12	5%
59047	Livingston	599	9%	1	1%	3,871	8%	-	0%	-	0%
59065	Pray	13	0%	0	0%	192	0%	-	0%	-	0%
59086	Wilsall	24	0%	0	0%	79	0%	-	0%	-	0%
	Other	37	1%		0%	107	0%		0%		0%

Work Location		# of Establishments				# of Employees					
Zip	Community	Actual (BEA) <sup>1</sup>		Employer Surveys <sup>2</sup>		Actual (BEA) <sup>1</sup>		Employer Surveys <sup>2</sup>		Employee Survey	
<b>Madison County<sup>4</sup></b>		366	6%	0	0%	1,469	3%	-	0%	-	0%
59720	Cameron	18	0%	0	0%	68	0%	-	0%	-	0%
59729	Ennis	168	3%	0	0%	572	1%	-	0%	-	0%
59735	Harrison	8	0%	0	0%	27	0%	-	0%	-	0%
59745	Norris	9	0%	0	0%	88	0%	-	0%	-	0%
59747	Pony	4	0%	0	0%	13	0%	-	0%	-	0%
59749	Sheridan	68	1%	0	0%	243	1%	-	0%	-	0%
59751	Silver Star	2	0%	0	0%		0%	-	0%	-	0%
59754	Twin Bridges	39	1%	0	0%	213	0%	-	0%	-	0%
59755	Virginia City	28	0%	0	0%	79	0%	-	0%	-	0%
	Other	22	0%		0%	166	0%		0%		0%
<b>Beaverhead</b>		387	6%	4	5%	2,308	5%	150	5%	8	3%
59724	Dell	1	0%	0	0%		0%	-	0%	-	0%
59725	Dillon	325	5%	4	5%	2,161	4%	150	5%	8	3%
59736	Jackson	3	0%	0	0%		0%	-	0%	-	0%
59739	Lima	10	0%	0	0%	33	0%	-	0%	-	0%
59761	Wisdom	13	0%	0	0%	48	0%	-	0%	-	0%
59762	Wise River	7	0%	0	0%	10	0%	-	0%	-	0%
	Other	28	0%		0%	56	0%		0%		0%
<b>Totals</b>		<b>6,475</b>		<b>75</b>		<b>48,266</b>		<b>3,282</b>		<b>247</b>	

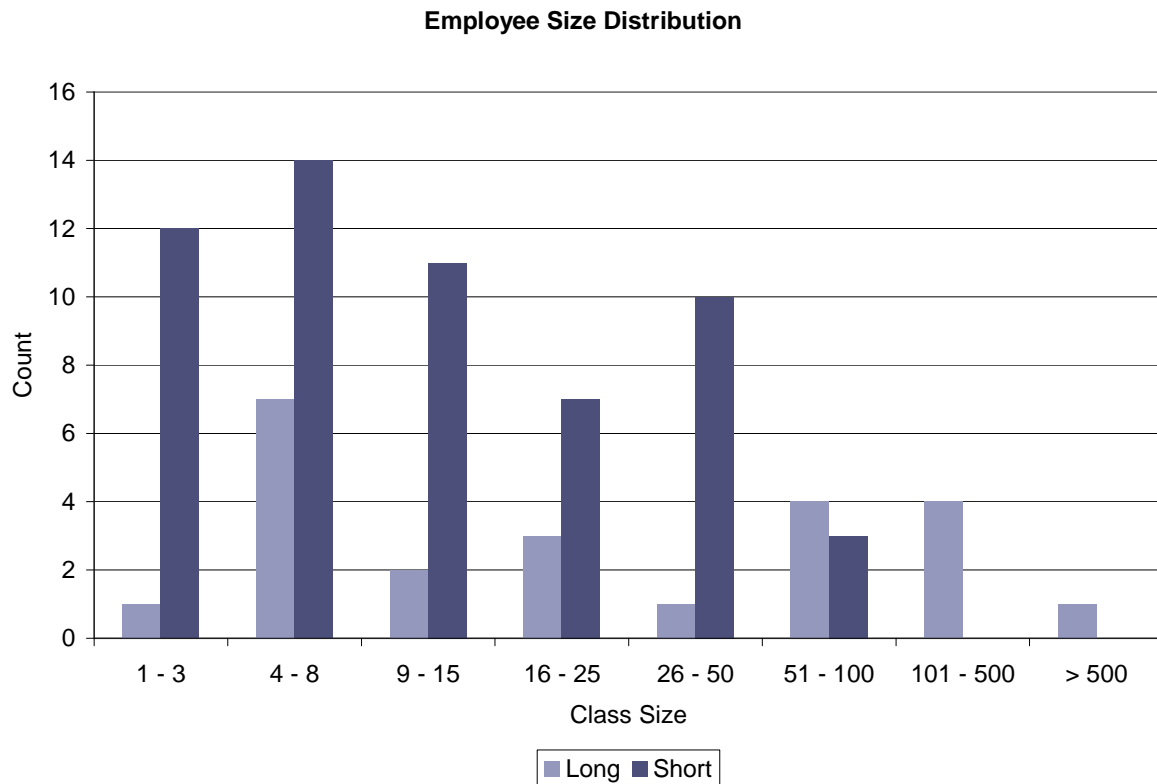
<sup>1</sup> Source: U.S. Census. Bureau of Economic Analysis. Annual Economic Survey 2006.

<sup>2</sup> Long and short employer survey

<sup>3</sup> Includes portions of Big Sky area within Gallatin County and Madison County

<sup>4</sup> Excluding Big Sky

The short survey was answered exclusively by businesses with less than 50 employees. The long survey, although targeted to the largest employers, also has representation from smaller employers. Most of these smaller businesses in this survey are units associated with the larger businesses, such as the Xanterra unit at Old Faithful, or a group at Big Sky. Figure 9 summarizes the employer survey responses based on employee size distribution.



**Figure 9: Employer size distribution based on survey category.**

## 5.2 Results

While a complete summary of results is included in Appendix B, C, and D, this section discusses some of the key findings related to:

- the perspective on cost of commuting for an employer
- the willingness to contribute towards realizing transportation costs
- the readiness to promote alternate transportation
- the commuter patterns of employees based on zip codes

### Commute Concerns

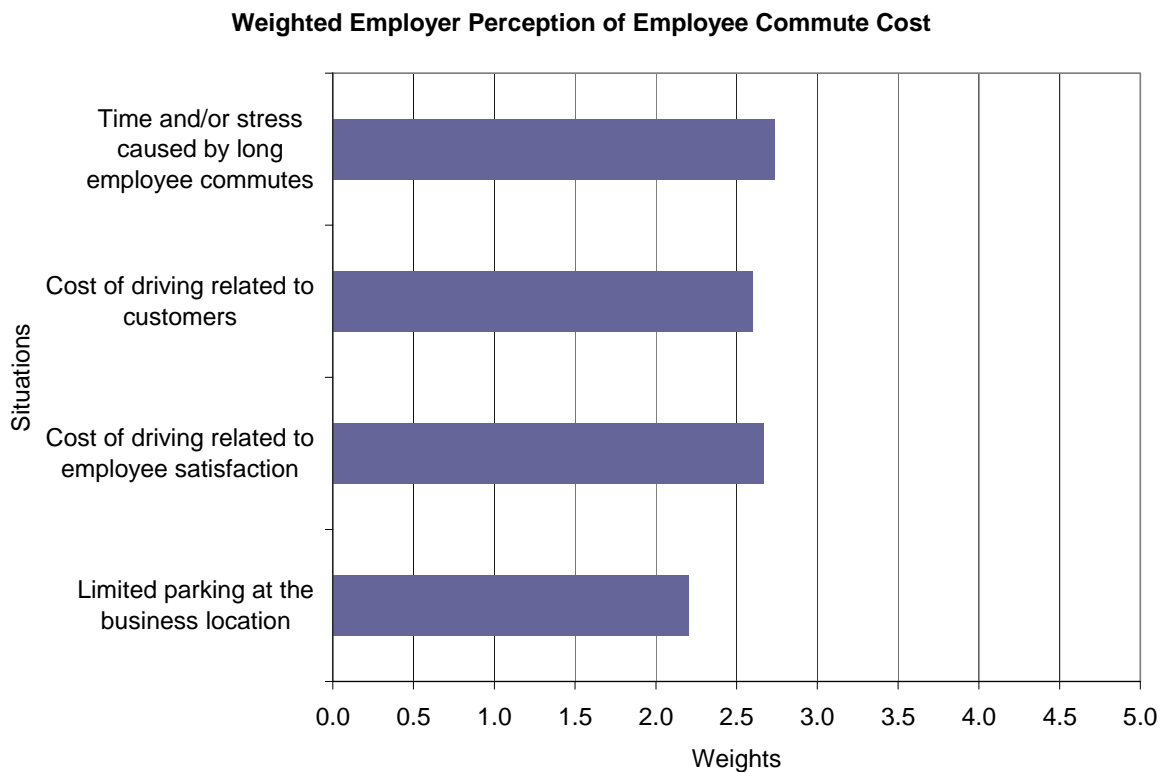
Employers were asked to rate the impact of employee commutes on their business. We know that Montana State University is concerned about filling their classified positions because of low wages combined with the high cost of housing in Bozeman, commuting costs, and on campus parking costs. How much does this issue or any other commute-based issue concern the remaining businesses in the region? Employers were asked to rate the impact of commuting on their business on a scale of 1 to 5, with 1 being the least impact and 5 being the highest impact. They were given four factors:

- Limited parking at the business location
- Time and/or stress caused by long employee commutes
- Cost of driving related to employee satisfaction

- Cost of driving related to customers

Based on the results shown in Figure 10, all factors were ranked below 3.0, less than neutral. The least ranked factor was the limited parking spaces at the business location, and the top ranked factor was the cost of driving related to employee satisfaction. Parking is free in the region except at MSU Bozeman and UM Western in Dillon and hence it became the least important factor of the study. Through a closer look at the survey, employers with 100 or more employees did rate the cost of driving related to employee satisfaction factor to an average of 4.1, whereas smaller employers rated this factor closer to 1.6. Similar results were observed for time and/or stress caused by long employee commutes.

The smaller businesses and the high wage businesses expressed little concern about transportation issues. The large employers with low wages and the employers in remote locations expressed more concern about transportation. These included Bozeman Deaconess Hospital, Big Sky, Xanterra, and Yellowstone.



**Figure 10: Commuter cost perception of employers in the region.**

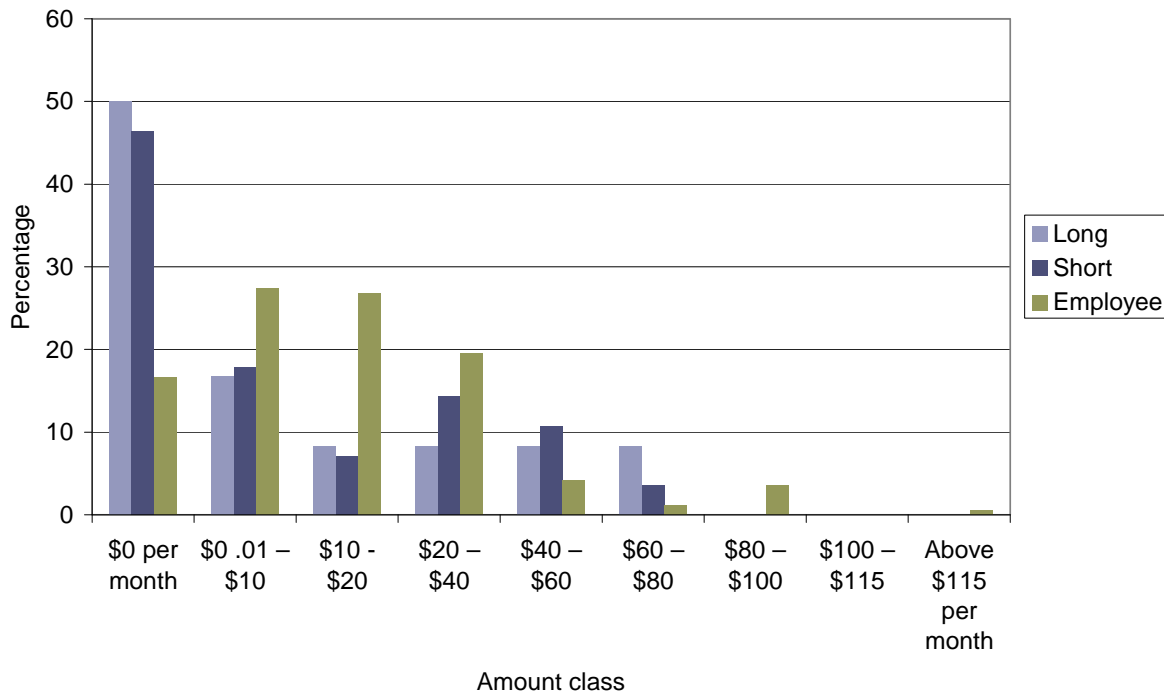
**Contribute To Transportation Costs**

Streamline began service by getting investments from the largest public organizations in the valley. The existing senior mill levy for the Galavan door-to-door service from Gallatin County, the City of Bozeman, and the City of Belgrade helped start Streamline. The Associated Students of Montana State University also invested \$130,000 per year. These local funds were then leveraged to get federal

funding. MSU eventually contributed to start Saturday and Livingston service. Still, needs in Bozeman and across the region far exceed available funding.

What level of support will our businesses contribute, and how much will we need to rely on increased public funding to expand service? We asked the amount employers would pay per employee per month to cover the cost of public transportation. Based on our analysis of 2007 Streamline costs and ridership, the full cost to provide in-town fixed-route bus service every workday for a month is more than \$100 per person. Federal law allows up to \$115 per month tax free to cover transit or carpool costs. Employers were willing to pay only a fraction of those costs. Half of the employers were willing to pay something, but no employers were willing to pay more than \$80 per employee per month. It is unclear whether employers perceive the associated transportation costs are much lower than actual costs, or whether the employers thought that employees or public funding should cover the remaining costs of transportation. The same question was asked of the employees. Figure 11 summarizes the employer and employee willingness to pay for the cost of transportation. In contrast to the 50% of employers who were willing to pay for transportation, 83% of employees were willing to pay. A small percent (4%) were willing to pay more than \$80 per month. Drilling into the data set we found these employees commute more than 35 miles one way. This data, combined with a good estimate on the number of commuters between these locations helps transportation planners to explore possibilities for commuter buses, carpools, and vanpools. It also identifies potential funding partners.

**Willingness to Pay for Transportation**



**Figure 11: Comparison of willingness to cover the cost of transportation**

### 5.3 Strategies to Support Alternative Transportation

Some business choices can help with transportation demand management (TDM) to reduce peak hour congestion or the overall amount of vehicle-miles traveled. While regions with poor air quality are required to have a TDM program, southwest Montana businesses implement some of these strategies principally because it improves workplace morale. Table 6 shows the demand management methods that the strategies support: transit, carpooling/vanpooling, walking, biking, telecommuting, or off-peak travel.

**Table 6: Business TDM Strategies and Methods They Promote**

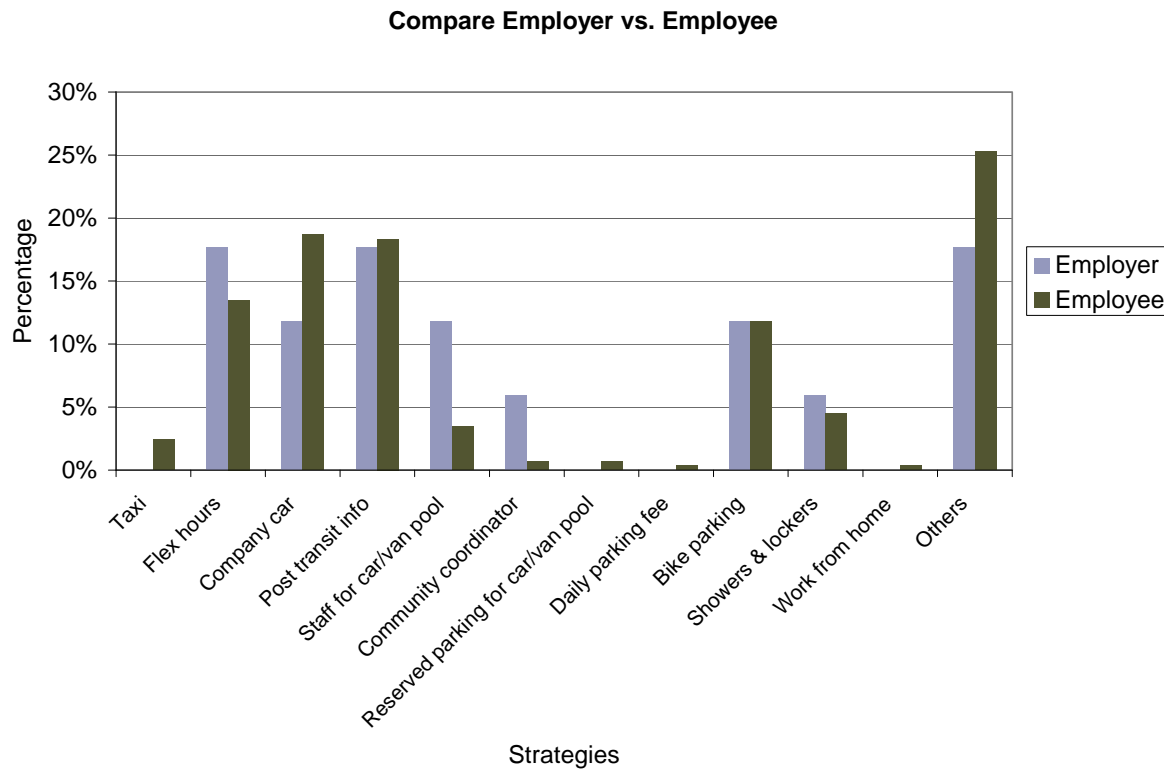
	Bus	Carpool	Walking	Biking	Telecom muting	Off-peak travel
Offer a taxi voucher or other guaranteed ride home to participants in case of emergency	✓	✓	✓	✓		
Offer flexible work hours	✓	✓				✓
Offer a company vehicle to use for business during the day	✓	✓	✓	✓		
Post transportation information (e.g. cycling routes, transit routes and scheduling)	✓	✓	✓	✓		
Appoint staff to help employees find people with whom to carpool or vanpool		✓				
Support a community car/vanpool coordinator to help employees find people with whom to carpool or vanpool		✓				
Reserve parking close to the building for carpools/vanpools		✓				
Charge a daily parking fee	✓	✓	✓	✓	✓	
Offer secure and convenient bike parking				✓		
Offer showers, clothing lockers, and change facilities			✓	✓		
Allow employees to work from home 2-3 days per week so they would only have to commute 2-3 days per week					✓	✓
Other strategies (write in option)	✓	✓	✓	✓	✓	✓

Employers were asked which strategies they use that could result in a reduction of peak-hour travel by a single occupancy vehicle (see Figure 12). The highest rated responses were “offer flexible work hours” and “post transportation information”. Most of the responders who indicated “other” said they had no strategies in place. No employers offered premium parking for carpooling, charged for parking, or reported allowing people to work from home. (In the region, only the universities charge for parking.)

Additionally, in the survey, around 18% of the respondents choose “Other strategies”. The following were the comments provided in the “Others” category.

- Some positions are flexible. We contribute to the Skyline Bus Fund. (Big Sky Resort)
- Community bus through Paradise Valley (Yellowstone National Park)
- Rideshare electronic board

To judge the employee’s knowledge of these strategies, the same question was posed in their survey. The results were summarized and compared with employer feedback to identify areas of agreement and disagreement. Figure 12 also shows employee responses for comparison to employers.



**Figure 12: Comparison of strategies between employers and employees.**

Again a large percentage of employees choose the “Other” option which allowed the respondents to write in different strategies other than the provided options. Most of them used that option to say that the employer does nothing to encourage alternate transportation. Some mentioned pathways and unique situations like the employer bus. The following were the write-in responses for the “Other” option.

- Co-workers give rides when needed.
- None really but it is free to ride the bus instead of drive.
- Contribute to Skyline Fund
- Walking path to work
- Too far to walk and can't carpool
- I have a county vehicle
- One co. car is available for 10+ employees
- I actually do ride a bicycle quite a bit
- Co. vehicle available but very few of them.
- There isn't, to my knowledge
- Bike parking. Or walking. I never drive.
- I telecommute 1 day/week and work 4 X 10 hour days/week so only commute 3 days/week
- Secure bike parking is not available
- I walk to work
- There is a bus provided for those working 10 hr work days
- No transit in area

- Unknown
- Nothing is available (or similar response) (14)

Most employer claims agreed with employees’ perception. The strategy of “posting of transit information” by the employer was agreed upon by most of the employees. This is a simple, yet effective step in educating employees on available public transit options and thus promoting them to utilize such options.

Conversely, the claims of flexible work hours, employer support for car/van pools, and support for a community car/van pool coordinator did not match employee knowledge of strategies. These claims differed by at least 25% and that is significant enough to be considered as differing opinions. Possibly these employer strategies failed to reach the consciousness of the employee. As an example, ASMSU operated Bobcat Transit for more than 10 years, yet only 14% of the student body knew about that in year 2005. Once Bobcat Transit was replaced by the better marketed Streamline service, awareness and ridership grew from 35 rides a day on Bobcat Transit to 700 rides a day on Streamline. Maybe better communication and education on available alternate transportation strategies will result in more employees utilizing these options.

### 5.4 Regional Commuter Pattern

The map shown in Figure 13 reflects a key finding from this study, the commuter flow between zip codes. Using the employer survey responses, it shows the movement of people in the region and establishes Bozeman acts as the major employment hub.

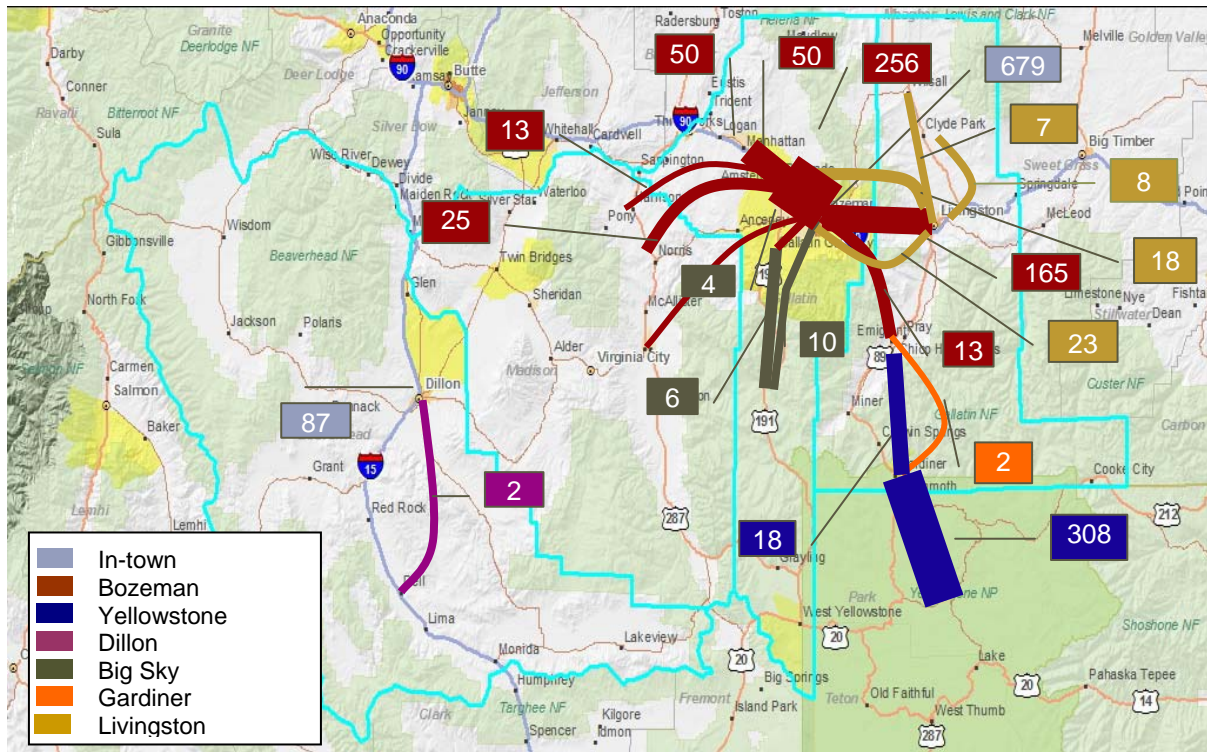


Figure 13: Commuter flow between and within different cities of the region.

Table 7 extrapolates the patterns from our sample against the number of people working in a community, resulting in a rough estimate of commuter movements. Data is derived from the surveys; Livingston commuter patterns are supplemented by data from the Livingston Transportation Advisory Committee. For example, the BEA counts 26,710 employees at reporting Bozeman businesses. This excludes businesses government and sole proprietorships, which are not required to report employee statistics. Extrapolating from our employer survey data, 53% of people who work in Bozeman zip codes (14,000 people) live in Bozeman zip codes. Our employee data indicates 63%, or 17,000 people live and work in Bozeman. Thus, we estimate this commuter movement to be between 14,000 and 17,000, and deem it to be a good, although rough estimate. The table shows ranges for each commuter movement, with our relative level of confidence in the estimate.

A comparison of the raw and extrapolated estimates shows that a significant portion of the employees commute long distances to work. Both tables reinforce the need of a larger regional system to accommodate both employer and employee transportation needs. It also shows the significant commuting between Bozeman and its neighboring communities. Similarly Big Sky and Yellowstone National Park also shows large commuter patterns. The commute pattern in Dillon does not show any connection with the rest of the region.

This type of commuter information is valuable to transportation planners because it improves the level of data that is available from the decennial census, which shows the number of people moving between counties. As an example, when Streamline was looking at starting bus service between Bozeman and Livingston, the only available data was the county-to-county movements of the census and roadway traffic volumes. This level of detail is more valuable in prioritizing bus, vanpool, and carpool services. For example, it shows more commuters from Three Forks and Manhattan to Bozeman than Livingston to Bozeman. This may indicate a demand for commuter service to these areas, although doesn't reflect some circumstances that could impact transit use such as winter driving conditions on Bozeman Pass increasing use from Livingston.

**Table 7: Regional Commuter Patterns**

Home Location	Work Location															
	Big Sky		Bozeman		Three Forks		Belgrade		YNP		Dillon		Gardiner		Livingston	
	#	Confidence <sup>3</sup>	#	Conf	#	Conf	#	Conf	#	Conf	#	Conf	#	Conf	#	Conf
<b>Gallatin County</b>																
59714, Belgrade	0-600	N	5,100-6,900	G											0-1200	N
59715-18, Bozeman <sup>1</sup>	500-1,500	G	14,000-17,000	G			0-4,300	B	0-30	G					0-1600	G
59730, Gallatin Gateway <sup>2</sup>	200-2,200	G	700-1,300	G							0-300	L				
59741, Manhattan			800-1,400	G												
59752, Three Forks			700-1,000	G	0-900	L										
59758, West Yellowstone	0-100	G														
<b>Park County</b>																
00075, Yellowstone <sup>4</sup>									120-150	G			50-80	G		
59027, Emigrant			0-250	N					20-80	G			0-75	L		
59030, Gardiner									300-400	G			200-280	G		
59047, Livingston			800-2,900	G											0-3800	B
59065, Pray													0-30	L		
59086, Wilsall															0-1000	N
<b>Madison County</b>																
59729, Ennis			0-250	G												
59745, Norris			0-500	G												
59747, Pony			0-250	G												
<b>Beaverhead County</b>																
59724, Dell											0-25	G				
59725, Dillon											1600-2200	G				
59751, Silver Star											0-270	L				
Other Locations			0-200	N												
<b>Total Jobs 2006<sup>5</sup></b>	<b>3092</b>		<b>26710</b>		<b>918</b>		<b>4374</b>		<b>539</b>		<b>2161</b>		<b>374</b>		<b>3871</b>	

<sup>1</sup> Includes all zip codes in Bozeman

<sup>2</sup> Includes portions of Big Sky area within Gallatin County and Madison County

<sup>3</sup> Confidence rating – Low (L), Neutral(N), Good(G)

<sup>4</sup> Includes Yellowstone

<sup>5</sup> Source: U.S. Census. Bureau of Economic Analysis. Annual Economic Survey 2006.

## 6 Funding/Fares Dilemma

The survey responses related to willingness to pay leads to a further discussion of transportation funding. We are faced with a skewed perception of economics in transportation. Public transportation, like private vehicle transportation, is funded through taxes. Based on the current IRS reimbursement rate, it costs \$33 round trip to drive between Bozeman and Livingston, yet people perceive the cost to be around \$7, and expect a bus fare to be around \$5. If commutes had to put that \$33 in cash into a farebox every time they drove over Bozeman Pass, it would change their decision making process and may change their willingness, or their employer's willingness, to pay for transit. Instead, Montanans and Americans have the results of this hidden cost, the fact that farebox revenue on a transit system covers only a small percentage of operation costs. In New York City, the service with the highest fare box recovery ratio in the country, fares cover 55% of the cost. In Los Angeles, it is 23%. Smaller communities like Bozeman are lucky to get 10%. In communities like Logan, Utah, Vail, Colorado, or Whidbey Island, Washington, their ratio is 0% because they are fare free. Meanwhile, the costs associated with the car are hidden. We rarely pay parking costs in our region, yet each space costs from \$250 per year in an area with low land costs, to more than \$2,000 per year in a parking garage (**source**).

One planning questions in public transportation is how much fare to charge. Both Streamline and Skyline are fare free, a policy that is popular with riders but raises doubts from some non-riding community members. Skeptics argue that people who use the system should pay for the service. Yet the fare free service increases ridership, benefiting both riders and non-riders. It leads to fewer cars on our roads and in our parking spaces. It also allows seniors, people with disabilities, and people with low incomes access to our community at a much cheaper cost than the alternative with no transportation. Setting aside the cost/benefit analysis of these societal benefits, the income from charging a fare would likely be less than the costs to administer the fare collection.

An estimated farebox recovery ratio for Streamline is about 7%. If Streamline charged a fare, MSU students would continue to ride free because they contribute through student fees. Seniors, people with disabilities, and qualified people with low incomes would ride free or at a discounted rate. Assuming a \$1 per ride regular fare and 50 cent discount fare, based on our approximation of 140,000 rides per year, the resulting collection can be up to \$61,000 per year. However, Streamline won't increase its budget by this amount because fares are deducted from the operating costs before applying for federal match dollars. The federal funds that cover just over 50% of Streamline's costs, Streamline could have a gross increase of \$28,000. When ridership decreases because of a fare, this value will become smaller.

There are additional costs associated with collecting a fare. With fares come the cost of installing fareboxes, printing and distributing tickets, collecting and counting money, and enforcement. An automated farebox costs around \$21,000, while low-tech fareboxes cost less. After the one-time capital costs, transit systems usually spend between 2% and 7% of operating costs on collection. This effort would be very much the same as one full-time equivalent employee at Streamline at a cost of \$51,000. Besides the direct financial costs, the routes would become less efficient as the drivers take time to collect and explain fares. Based on this analysis, Streamline's costs would be greater than its expenses because of the federal reimbursement rules. Even if Streamline wasn't to get full federal match, it would be lucky to get a net increase in revenue. Any increased revenue would be negligible compared to the benefits of a fare free system.

Consider a 1994 report by the University of Washington for the Washington State Department of Transportation. Their conclusion: "The cost of adopting a fare-free policy is minimal. Half of the transit systems in Washington return less than a 10 per cent fare box recovery rate. Our analysis demonstrates that once the costs of collecting fares are deducted little, if any, net revenue is generated. We conclude that fare-free policy does make a difference and that smaller communities especially are better served by a fare-free transit policy."

Also consider Skagit Transit in Washington State, which went from a fare-free to a user-pay system because taxpayers didn't want people to have a "free ride." The result: they took in \$121,300 from fares for but ended up spending \$133,385 to collect that amount.

## 7 Housing and Transportation Affordability

Another skewed perception relates to transportation and housing costs. Typical housing affordability studies exclude commuting costs from analysis. Families also regularly minimize transportation costs when choosing a home. Considering these issues, we attempted to calculate the cost of living and transportation for the region. From the previous sections, it was clear that Bozeman is the major economic hub in this region. Hence, we computed the costs for someone who lives in outlying communities and commute to Bozeman, then compared that with the costs associated with someone who lives and works in Bozeman. In other words, we wanted to check the veracity of the popular concept in the region that it is cheaper to live outside Bozeman and commute to a job in Bozeman.

First we computed the commuter miles between the community and Bozeman. Table 8 summarizes the calculations. The commuter miles per day represents the one way commuter miles, doubled to get the roundtrip miles per day. Per month commuter miles are obtained by using five working days in a week and 4.3 weeks per month; annual miles multiply monthly values by 12. The same mileage calculation was used in all comparisons of costs.

**Table 8: Mileage to Bozeman**

	Belgrade	Three Forks	Manhattan	Ennis	Livingston	Big Sky	Bozeman (near)
One way commuter miles per day	11.2	31.1	19.9	52.1	26.1	41.4	3.8
roundtrip miles per day	22.4	62.2	39.8	104.2	52.2	82.8	7.6
miles per month	481.6	1337.3	855.7	2240.3	1122.3	1780.2	163.4
miles per year	5,779	16,048	10,268	26,884	13,468	21,362	1,961

Next we calculated commute costs and added it to the median gross rent to get a combined cost. The cost of operating an automobile followed the 2007 methodology from the American Automobile Association (AAA). If we assume a household must have the same number of vehicles independent of commuting method, commute costs are the marginal costs including gas price, maintenance, tires, and the increased depreciation per mile (for the low-mileage Bozeman commuter, there is no increased depreciation). The cost per month is calculated for two different gas prices. We used the AAA estimate of \$2.94 per gallon, which was a late 2007 estimate from and \$4.11, the peak 2008 price. Gas mileage is assumed at 25.2 miles per gallon. Costs are higher than estimated for luxury cars, newer vehicles, and less fuel efficient vehicles. In the same sense, older cars and used cars are less expensive because of the lower rate of depreciation.

The median gross rent for Bozeman is reportedly lower than Belgrade, but the lower and upper quartiles of annual gross rent has a much larger spread. This can be attributed to college student rentals, bringing the median down.

For someone working in Bozeman and living in the median rental in a community, it is cheaper to live in Bozeman than to pay rent and commute costs from any other community. If a family working in Bozeman can get around with one car instead of two, it can save between \$6,800 (Bozeman) to \$11,000 (Big Sky).

**Table 9: Housing and Transportation Costs for a Bozeman Worker - Median Rent**

<b>Commuting Costs</b>	Belgrade	Three Forks	Manhattan	Ennis	Livingston	Big Sky	Bozeman (near)
<b>Operating Costs*</b> per mile							
gas @ \$2.94 per gallon	\$0.12	\$0.12	\$0.12	\$0.12	\$0.12	\$0.12	\$0.12
gas @ \$4.11 per gallon	\$0.16	\$0.16	\$0.16	\$0.16	\$0.16	\$0.16	\$0.16
Maintenance	\$0.046	\$0.046	\$0.046	\$0.046	\$0.046	\$0.046	\$0.046
Tires	\$0.007	\$0.007	\$0.007	\$0.007	\$0.007	\$0.007	\$0.007
increased depreciation per mile	\$0.038	\$0.038	\$0.038	\$0.038	\$0.038	\$0.038	\$0.000
<b>Cost at \$2.94/gallon</b>							
per mile	\$0.207	\$0.207	\$0.207	\$0.207	\$0.207	\$0.207	\$0.170
<b>per month</b>	<b>\$100</b>	<b>\$277</b>	<b>\$178</b>	<b>\$465</b>	<b>\$233</b>	<b>\$369</b>	<b>\$28</b>
per year	\$1,199	\$3,329	\$2,130	\$5,578	\$2,794	\$4,432	\$333
<b>Cost at \$4.11/gallon</b>							
per mile	\$0.254	\$0.254	\$0.254	\$0.254	\$0.254	\$0.254	\$0.216
<b>per month</b>	<b>\$122</b>	<b>\$339</b>	<b>\$217</b>	<b>\$569</b>	<b>\$285</b>	<b>\$452</b>	<b>\$35</b>
per year	\$1,467	\$4,074	\$2,607	\$6,825	\$3,419	\$5,423	\$424
<b>Driving Cost Per Person at \$2.94/gallon</b> per month							
<b>drive alone</b>	<b>\$100</b>	<b>\$277</b>	<b>\$178</b>	<b>\$465</b>	<b>\$233</b>	<b>\$369</b>	<b>\$28</b>
2 persons	\$50	\$139	\$89	\$232	\$116	\$185	\$14
3 persons	\$33	\$92	\$59	\$155	\$78	\$123	\$9
4 persons	\$25	\$69	\$44	\$116	\$58	\$92	\$7
<b>Housing &amp; Marginal Car Costs</b> per month							
median gross rent, 2007**	\$743	\$699	\$645	\$579	\$607	\$753	\$713
commute costs (\$2.94/gallon)	\$100	\$277	\$178	\$465	\$233	\$369	\$28
commute costs (\$4.11/gallon)	\$122	\$339	\$217	\$569	\$285	\$452	\$35
Housing + commute at \$2.94	<b>\$843</b>	<b>\$976</b>	<b>\$823</b>	<b>\$1,044</b>	<b>\$840</b>	<b>\$1,122</b>	<b>\$741</b>
Housing + commute at \$4.11	<b>\$865</b>	<b>\$1,038</b>	<b>\$862</b>	<b>\$1,148</b>	<b>\$892</b>	<b>\$1,205</b>	<b>\$748</b>
<b>Additional Cost of Car Ownership</b> per year							
full-coverage insurance	\$943	\$943	\$943	\$943	\$943	\$944	\$943
license, registration, taxes	\$554	\$554	\$554	\$554	\$554	\$554	\$554

<b>Commuting Costs</b>	Belgrade	Three Forks	Manhattan	Ennis	Livingston	Big Sky	Bozeman (near)
depreciation (15,000 mi/yr)	\$3,321	\$3,321	\$3,321	\$3,321	\$3,321	\$3,321	\$3,321
finance charge	\$758	\$758	\$758	\$758	\$758	\$758	\$758
<b>Total</b>	<b>\$5,576</b>	<b>\$5,576</b>	<b>\$5,576</b>	<b>\$5,576</b>	<b>\$5,576</b>	<b>\$5,577</b>	<b>\$5,576</b>
<b>Non-Commuter Miles***</b>							
per day	14	14	14	14	14	14	14
per month	426	426	426	426	426	426	426
per year	5,110	5,110	5,110	5,110	5,110	5,110	5,110
<b>Non-Commuter Cost Per Year</b>	<b>\$1,060</b>	<b>\$1,060</b>	<b>\$1,060</b>	<b>\$1,060</b>	<b>\$1,060</b>	<b>\$1,060</b>	<b>\$867</b>
<b>Total Cost of Ownership</b>	<b>\$7,835</b>	<b>\$9,966</b>	<b>\$8,767</b>	<b>\$12,214</b>	<b>\$9,430</b>	<b>\$11,068</b>	<b>\$6,775</b>
<b>Potential savings: 1 less car per household</b>	<b>\$7,835</b>	<b>\$9,966</b>	<b>\$8,767</b>	<b>\$12,214</b>	<b>\$9,430</b>	<b>\$11,068</b>	<b>\$6,775</b>

Note: Housing + marginal car costs do NOT include the fixed costs of insurance, taxes, depreciation, and finance costs associated with owning an auto.

\* AAA Your Driving Costs 2008 Addition

\*\* source: <http://www.city-data.com>

\*\*\* derived from Teton County Travel Study 2001

We then compared the renting situation to home ownership. The monthly mortgage was calculated from the median price of house/condo sales for each of the towns/cities. It was assumed at a 10% down payment, 30 year loan at 6% per month for all of these locations

**Table 10: Housing and Transportation Costs for a Bozeman Worker - Median Mortgage**

<b>Commuting Costs</b>	Belgrade	Three Forks	Manhattan	Ennis	Livingston	Big Sky	Bozeman (near)
	per month						
<i>Housing &amp; Marginal Car Costs</i>							
Median home sales price**	\$236,751	\$186,113	\$249,027	\$184,144	<b>\$145,222</b>	\$508,358	\$294,186
Mortgage	\$1,277	\$1,004	\$1,344	\$994	\$784	\$2,743	\$1,587
commute costs (\$2.94/gallon)	\$100	\$277	\$178	\$465	\$233	\$369	\$28
commute costs (\$4.11/gallon)	\$122	\$339	\$217	\$569	\$285	\$452	\$35
housing + commute at \$2.94/gallon	\$1,377	\$1,282	\$1,521	\$1,458	\$1,016	\$3,112	\$1,615
housing + commute at \$4.11/gallon	\$1,400	\$1,344	\$1,561	\$1,562	\$1,069	\$3,195	\$1,623
<b>Total Cost of Ownership</b>	<b>\$7,835</b>	<b>\$9,966</b>	<b>\$8,767</b>	<b>\$12,214</b>	<b>\$9,430</b>	<b>\$11,145</b>	<b>\$6,775</b>
<i>potential annual savings: 1 less car per household</i>	<b>\$7,835</b>	<b>\$9,966</b>	<b>\$8,767</b>	<b>\$12,214</b>	<b>\$9,430</b>	<b>\$11,145</b>	<b>\$6,775</b>
<i>Housing &amp; Full Car Costs (annual)</i>							

Using the median home price plus marginal transportation costs, the cost of living in Bozeman is higher than living any of the neighboring communities other than Big Sky, even after including the commuting costs. When considering the value of a commuter's time or the full cost of ownership, Bozeman becomes the more economical choice. The additional cost associated with owning the second automobile remained the same and hence not shown in Table 10.

The above mentioned calculations and conclusions apply to people who work in Bozeman and commute from nearby communities. Whether owning or renting, Big Sky is the most expensive place to live. Leaving out all other considerations, it is economically better to live somewhere else and commute to Big Sky. It is better to stay (mainly rent) in Bozeman if you are working in Bozeman as the rent based calculations show that Bozeman is the cheapest option to live. But at the same time, the mortgage based calculations show that it is cheaper to own a house in the nearby communities when compared to Bozeman and the large difference in price provides a cushion to absorb the additional commute costs.

The house/condo price data from city-data.com failed the reality check for Livingston. Hence, we suggest finding a better data source to see what really is the house/condo sale price in Livingston and then augment this study with the updated information.

## 8 Provider and Stakeholder Participation

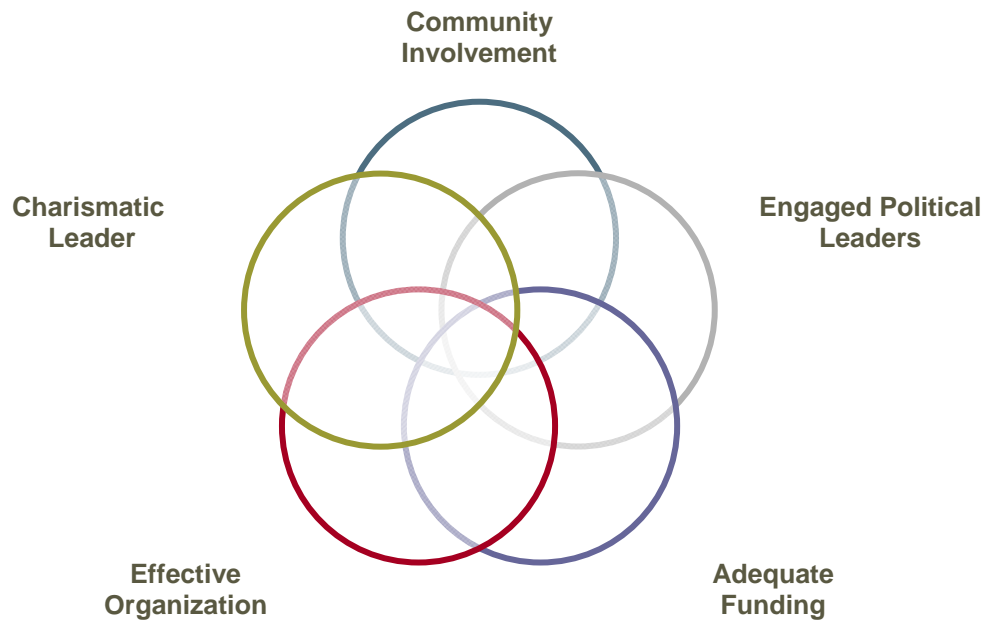
As a part of the project we held a regional meeting of transportation providers, Transportation Advisory Committees (TAC) members, users, and the business/destination community to present study results to gather feedback. The meeting was conducted at November 12, 2008 in Bozeman. Invitees from Bozeman, Big Sky, Yellowstone, West Yellowstone, and Livingston were able to attend.

### 8.1 Key Topics

Besides the materials presented in previous sections of this document, we discussed some organizational elements for growing service. The group discussed the interrelated elements shown in Figure 14. An effective transit organization will have the people and procedures to provide quality and cost effective transportation. The organization will have someone with charisma taking a leadership role to engage others in coordination and work towards growing service. The organization and leader will also help build community involvement. If these are in place, then political leaders will be engaged. All of these can build support for adequate funding. Each of these elements can help build other elements, yet the lack of one can tear others down.

Similarly, Michael Gerber's insight into a successful small business in his book, "The E-Myth Revisited", relates to an effective transit organization. Just because someone knows how to do the technical work – transit operations - does not mean that someone also knows how to build the transit system. Most people in transit were never taught how to do it. Gerber identifies three roles that must be fulfilled to build an organization - the technician who does the work, the manager who monitors and organizes the work and the entrepreneur who, led by a vision, builds the business. Finally, he says to design the organization to such a high standard that it can work without the leader. With the right systems, processes, policies and procedures an organization will run like a well-oiled machine. The aim is to build a business which depends on systems and not people.

We presented these concepts to help trigger thoughts about a participant organization's needs to enhance service.



**Figure 14: Elements for growing a rural transit system.**

## 8.2 Participant Ideas

At the end of the day, participants expressed their ideas based on the information absorbed and their intended actions based on this. The ideas included an idea for further research. As a group of people with high transportation needs, one participant suggested contacting home health agencies in the region to identify their unique transportation needs. These agencies have hundreds of part-time, low-wage employees working in different localities in the region, sometimes commuting long distances to reach the work place. Surveying their transportation needs will augment the current study results.

## 8.3 The Do Nothing Alternative

Discussion covered the alternative to doing nothing, an appropriate thought process in any economic analysis for assessing the base case. For alternative public transportation, we can leave things in their current state or eliminate any organized public transportation, carpooling, and building of bike and pedestrian facilities. The costs associated with this are: limiting community access for seniors and people with disabilities, resulting in a higher dependence on government social programs, transportation from family members, and poorer quality of life; expenses of car ownership for people with low incomes or for charity and/or government organizations; less opportunities to exercise via walking or bicycling, contributing to societal obesity problems and the health costs associated with that; and continued growing use of the single occupancy vehicle with its negative relations with dependence on foreign oil, larger roads, more parking lots, and sprawl.

## 8.4 The Value of Research

One finding from this research points to the core purpose of doing research. Sometimes people's perceptions differ from actuality. In our case, planners thought that the commute between Livingston and Bozeman was more significant than from Manhattan and Three Forks, yet our survey found a larger demand in the opposite direction.

## 8.5 Other Constituent Feedback

For feedback, the service providers were asked to list the three things they can do to fulfill regional transportation needs, whereas the customers were asked to list the three things to fulfill their transportation needs. The customers' needs were to provide:

- A commuter route from Three Forks to Bozeman, including Manhattan and Belgrade.
- More details of transit routes to facilitate trip planning on the web or via phone. If all stops were listed in numeric order, and if the time tables included all stops, that might make it easier to understand, especially for people with disabilities. Unfortunately the standard printed schedules do not have enough room for these details, but the web page could address this.
- Consistent stop announcements on all fixed-route services.
- Real-time bus locations for passengers.
- Expanded Livingston to Bozeman service to include Bozeman to Livingston and to include morning, noon and evening runs.
- Expanded Streamline routes in Bozeman to cover more neighborhoods (south side, west side, northeast, and Durston)
- A website that combines the schedules of all transit service providers in the region, so that customers can educate themselves about the available options and plan to modify their travel patterns accordingly to be more dependent on public transportation rather than their personal vehicles.

## 8.6 Participant Next Actions

Attendees generated their own next steps:

- The Director of Streamline/Galavan will coordinate with outlying providers to help more effectively move passengers once they arrive in Bozeman.
- A West Yellowstone representative will communicate with Galavan West and the Yellowstone Foundation about the potential of merging or better coordination with Big Sky. This is especially urgent given the imminent retiring of the director.
- The representative from Karst Stage will research a voucher system for locals who are traveling the Gallatin Canyon.
- The Director of Streamline/Galavan will look into serving as a central point of contact for users of regional services to better coordinate on a daily basis.
- Everyone will better consider the regional transportation concept instead of just considering local needs.
- All participants agreed to meet with TACs in the region to meet at least twice a year.

The summaries of the discussion suggest that both customers and providers in the region realize the need for a better transportation system that covers the regional needs. This understanding is the first step towards realizing a regional network of services and infrastructure.

## 9 Conclusions

Through our research, we have identified some key points pertaining to southwest Montana. This is the first time reliable commuter data for this region has been assessed as it relates to alternative transportation strategies. The information should help in making the next step in connecting the communities.

The cost of transportation affects economic growth. Affordability of a location is not just based on housing prices, but should also be influenced by transportation costs. Transportation has its place in economic development for commuters, seniors, people with disabilities, and tourists. Alternate transportation modes need to fit the different communities. The proper solution is a mix of transit, car/van pool, shuttles, private tours, walking, and biking.

The impact of this project was evident from the provider discussion, where individuals agreed to cooperate and think regionally. This study identified the travel patterns of commuters, and it started identifying the perspectives of employers as it relates to transportation.

A next step would be the funding of a regional coordinator to help improve the regional system within the existing funding. The Yellowstone Business Partnership's larger concept of a Greater Yellowstone transportation cooperative incorporating Montana, Wyoming and Idaho will help create the transportation network that should serve the region, but as an in between step, more can be accomplished through regional coordination among the agencies.

We started this document with the story of Streamline's commuter test run from Livingston to Bozeman. The length of the commute and the poor winter road conditions on the pass between both help fill the bus. The demand is an indication of the success of commuter routes, and our commuter numbers from Three Forks and Manhattan warrant consideration of a service connecting to Bozeman. We have proven that people in Montana will take transit, carpool, bike, or walk; this study has collected data to help do that more effectively.

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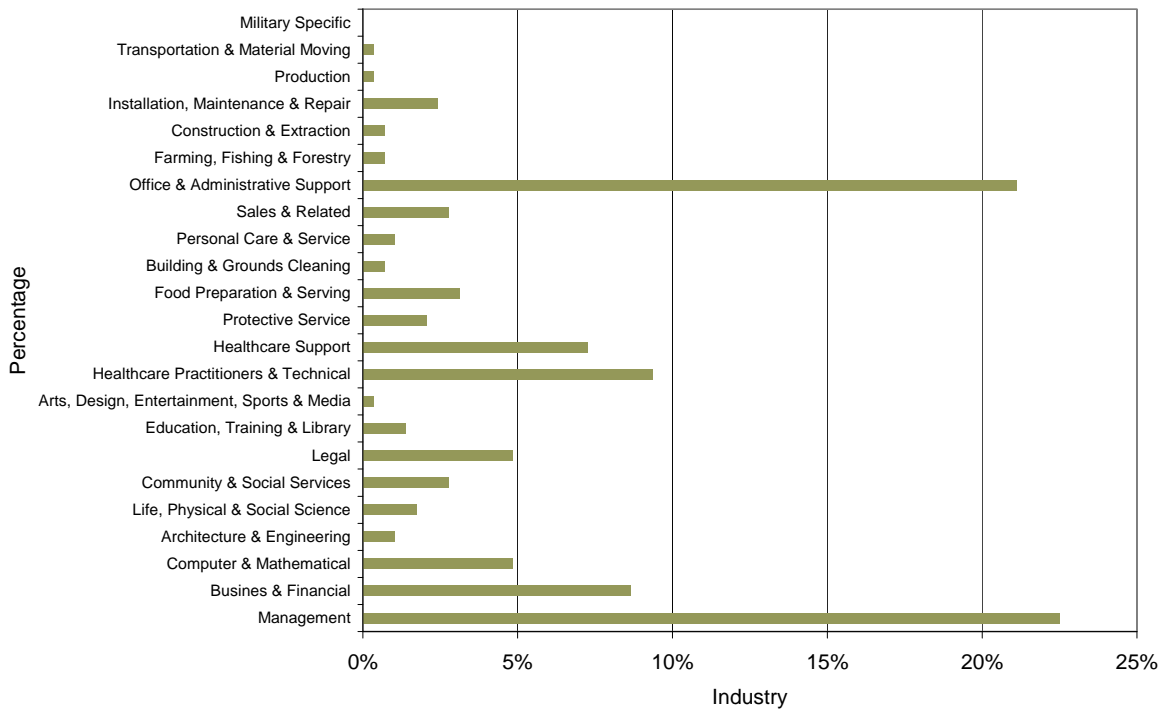
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# Appendix B: Employee Survey Results

This survey was conducted to obtain feedback from the employees of the largest employers of the region. This survey was distributed by individual employers to their respective employees to be completed anonymously. Employers who participated in the short version of the survey did not have access to the employee survey. Questions specific to commuter patterns, alternate transportation strategies, transportation costs, TDM strategies etc. were the highlight of the survey. The summary of the responses from the survey are summarized below.

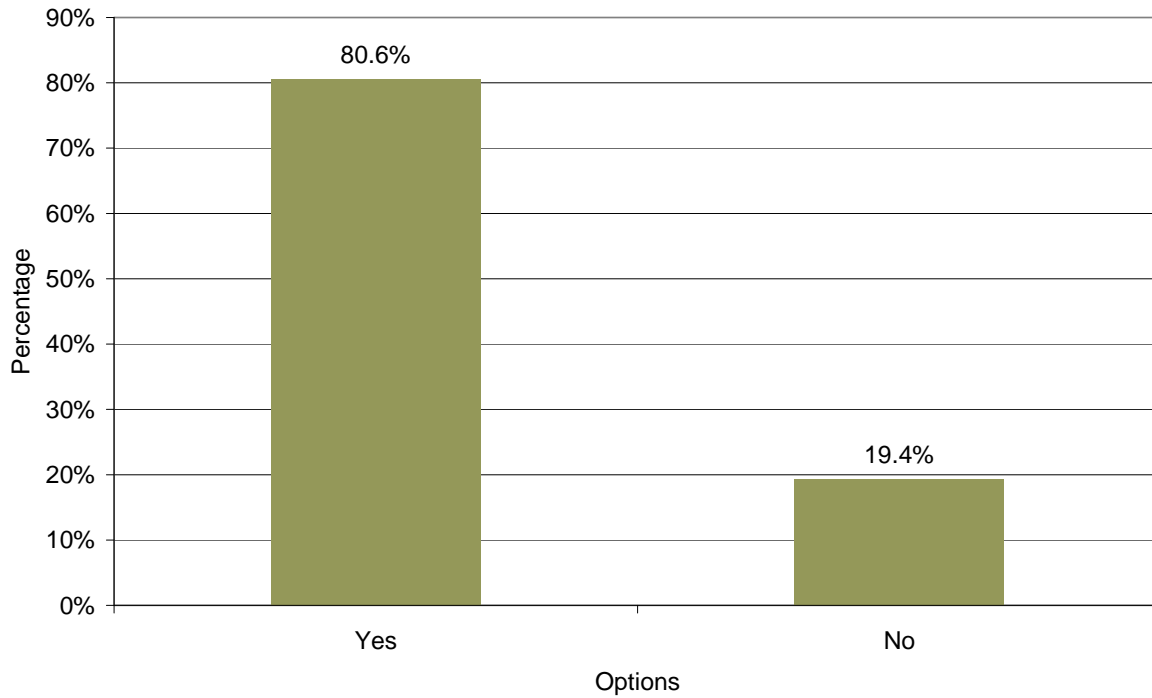
## Q-3: What category below best describes your job?

SW Montana Employee Survey Responses by Industry Type



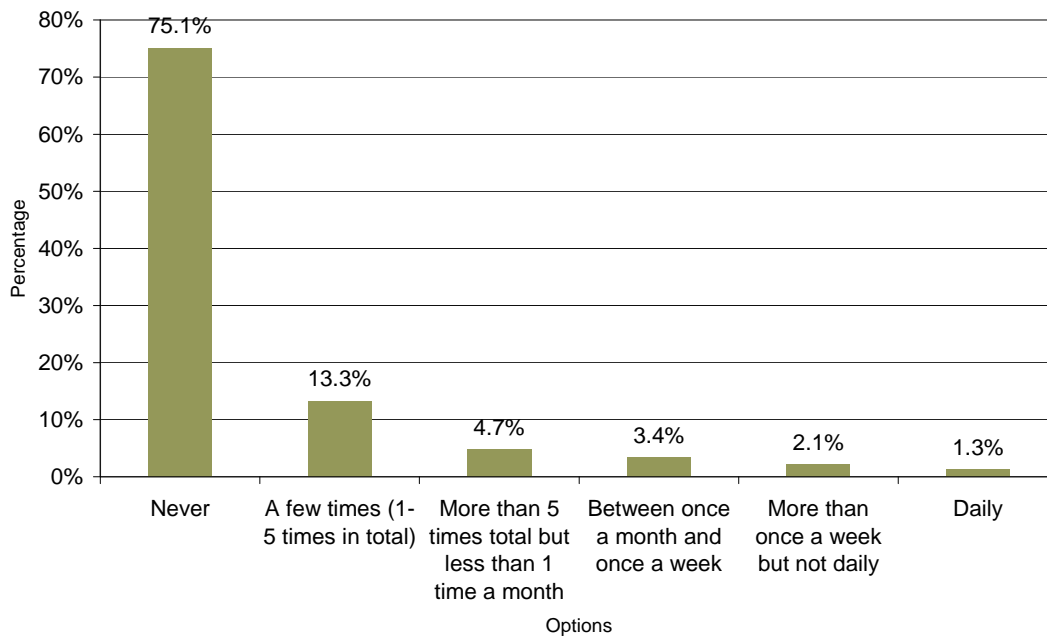
## Q-4: Do you live or work in Gallatin County or Big Sky?

**Survey Respondents from Gallatin County or Big Sky**



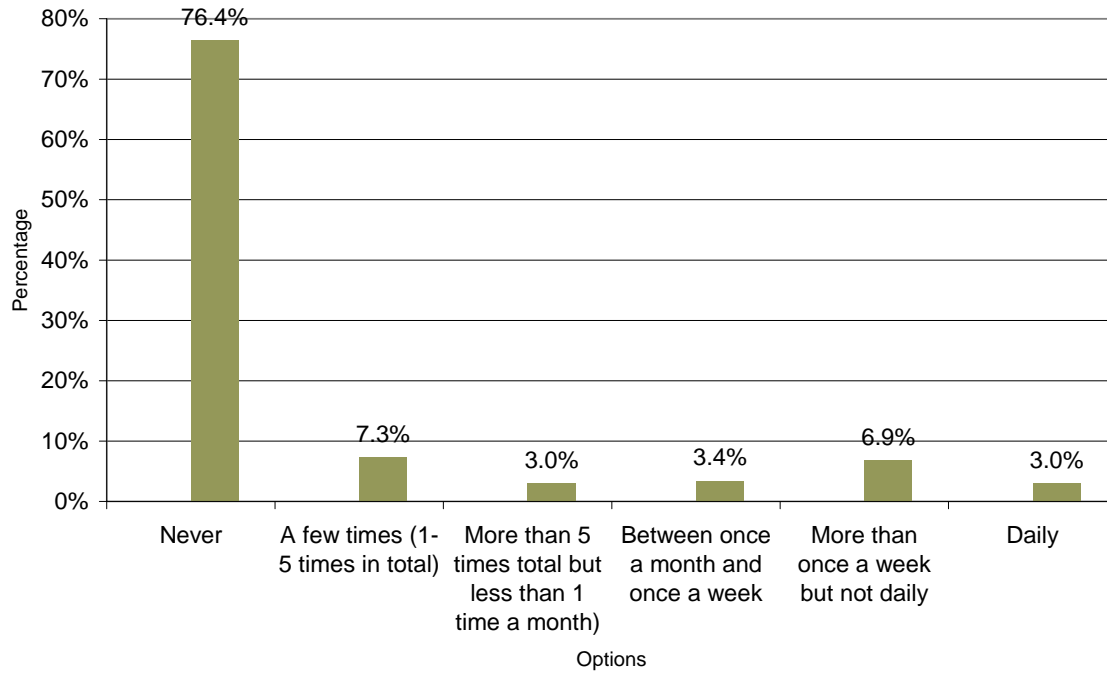
**Q-5: How many times have you used the Streamline bus in Bozeman and Belgrade?**

**Streamline Usage**



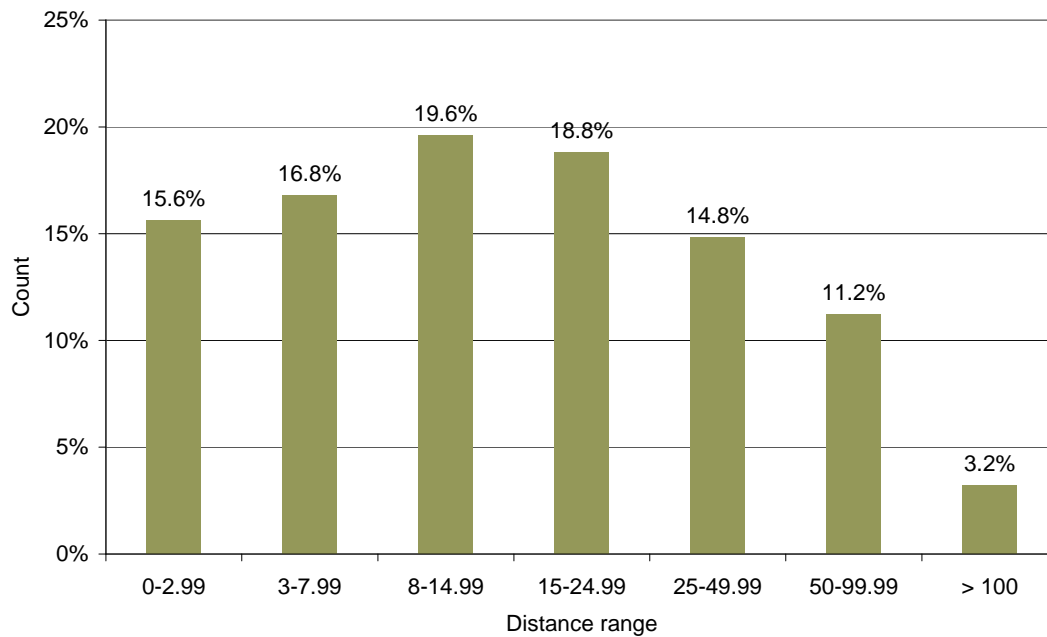
**Q-6: How many times have you used Big Sky's Skyline bus?**

**Skyline Usage**



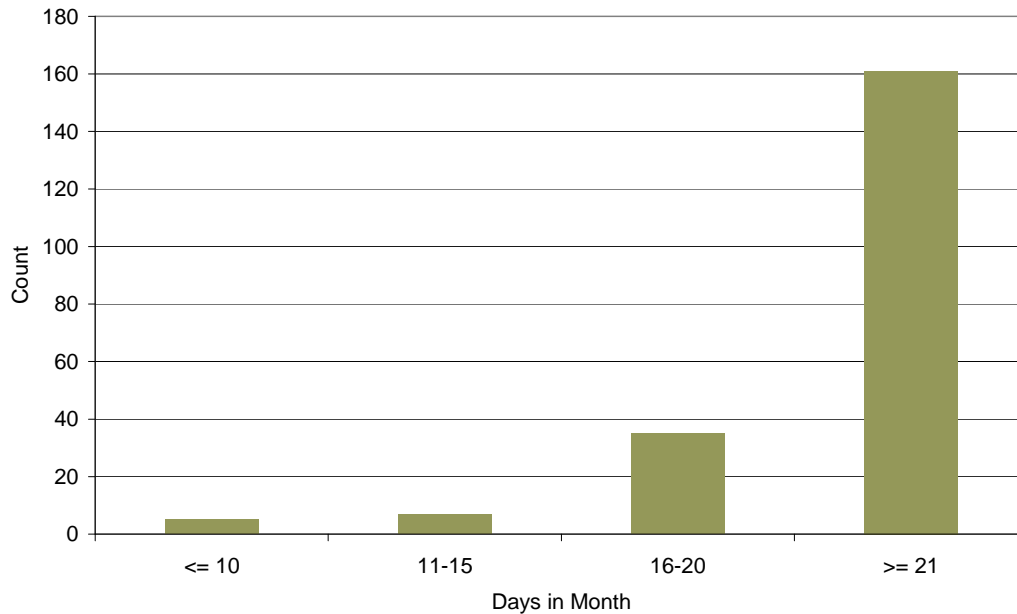
**Q-7: How many miles do you commute daily (round trip) for work?**

**Employee Commute Miles (Round trip)**



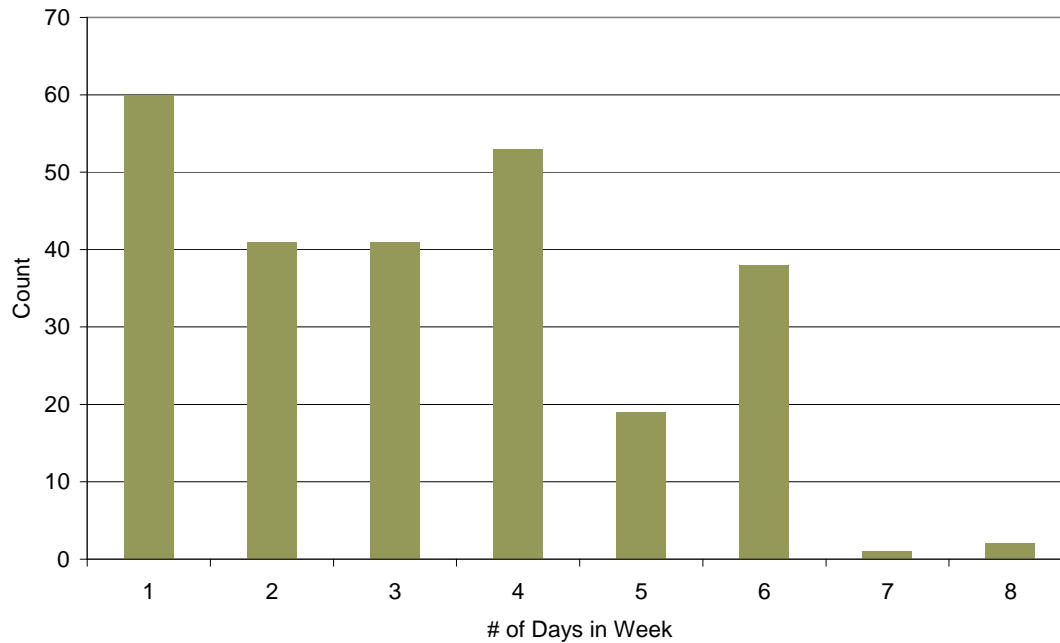
**Q-8: How many days in a month do you work (full time jobs are typically 21 days)?**

**Working Days in a Month Distribution for SW Montana Employees**



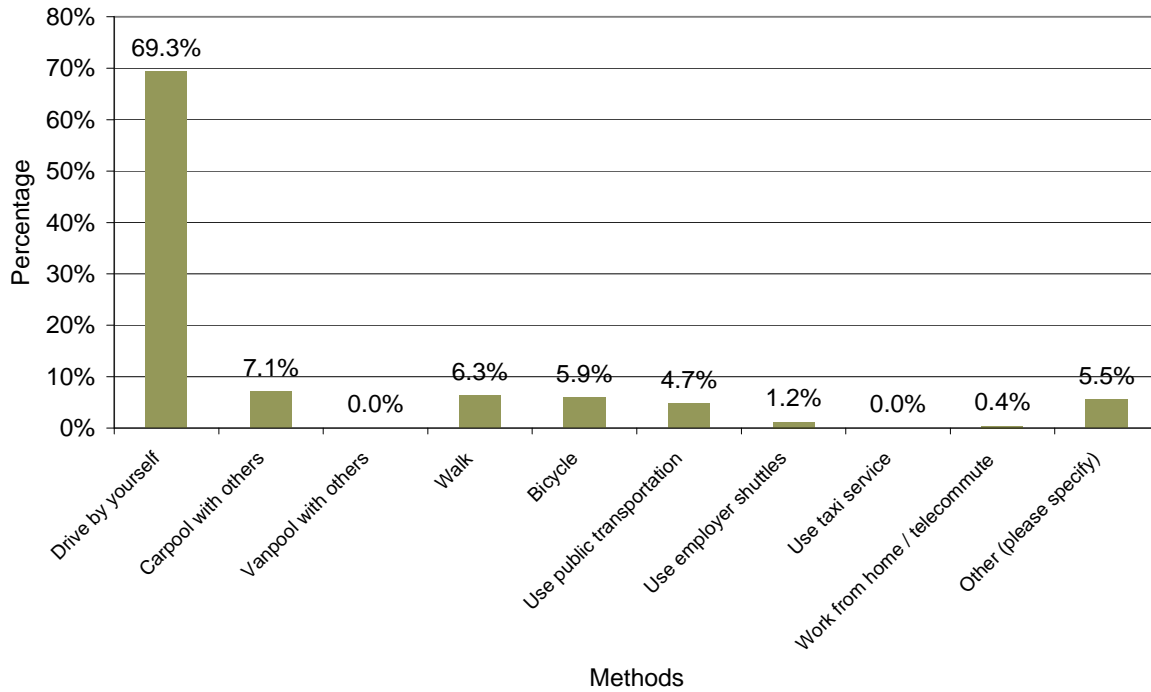
**Q-9: How many days per week do you combine other trips with your commute to work? (e.g. daycare, grocery shopping, medical appointments)**

**# of Days in a Week to Combine Commute With Other Trips**



**Q-10: Which method best describes your commute?**

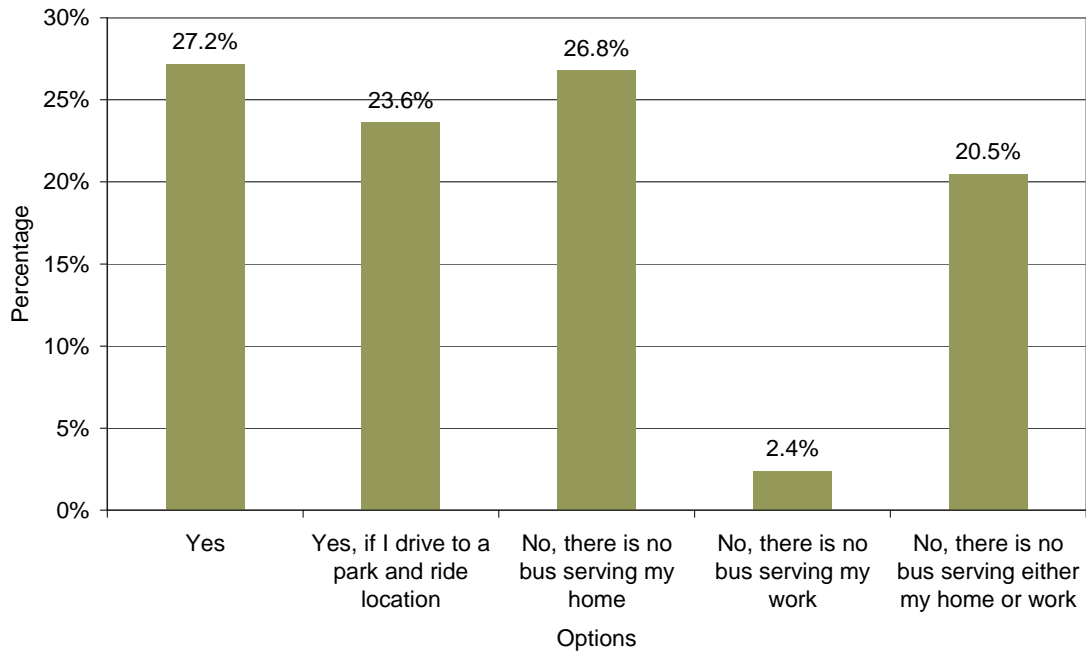
**SW Montana Employee Commute Methods**



Other (please specify)
DRIVE TO WORK W/ROOMMATE; SOMETIMES ALONE
DRIVE-DROP OFF CHILD AT SCHOOL
Use company vehicle for work commute
Drive my daughter to SMS
Drive with my husband to work.
issued county vehicle so no commute since I am on duty when I start the vehicle assigned vehicle
I do carpool with my kids when the schedule permits.
Take children to school in the mornings.
half the week I walk, the other half of the week I ride the bus
Mostly drive, sometimes carpool, sometimes ride bike and sometimes ride bus.
DRIVE WITH CHILD TO DAYCARE THEN WORK
myself and my child to drop at day care
bike in the summer drive by self in winter

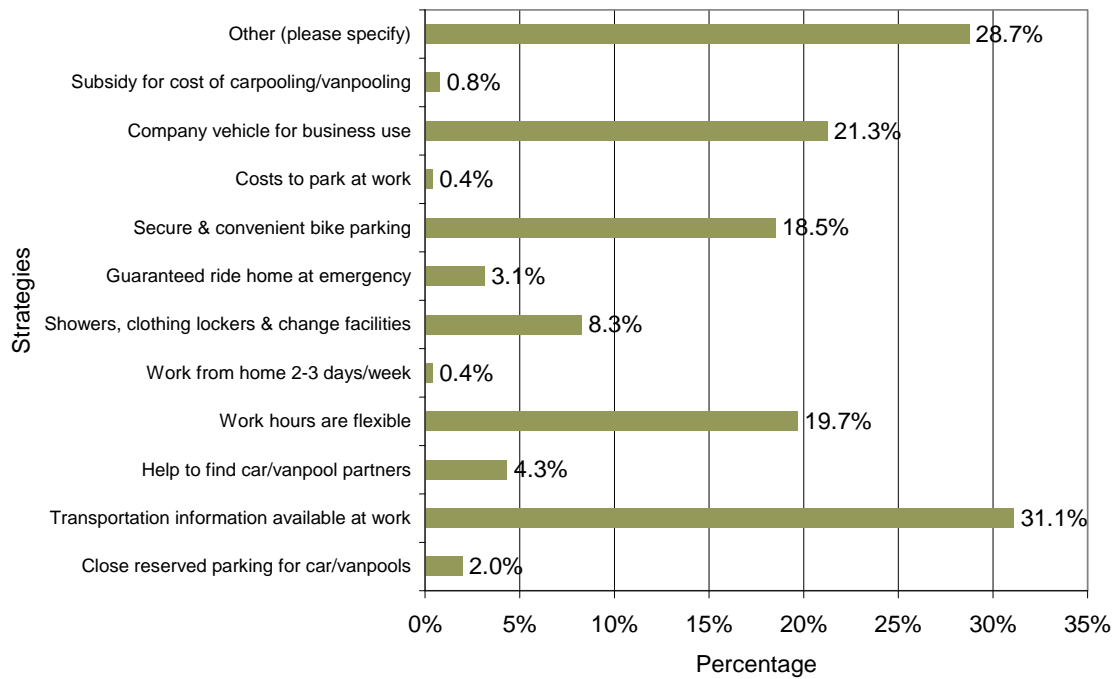
**Q-11: Is there bus service between your home and work?**

**Availability of Bus Service at Work or Home**



**Q-12: What strategies do your employer use that encourages taking transit, walking, cycling, or car/vanpooling to work?**

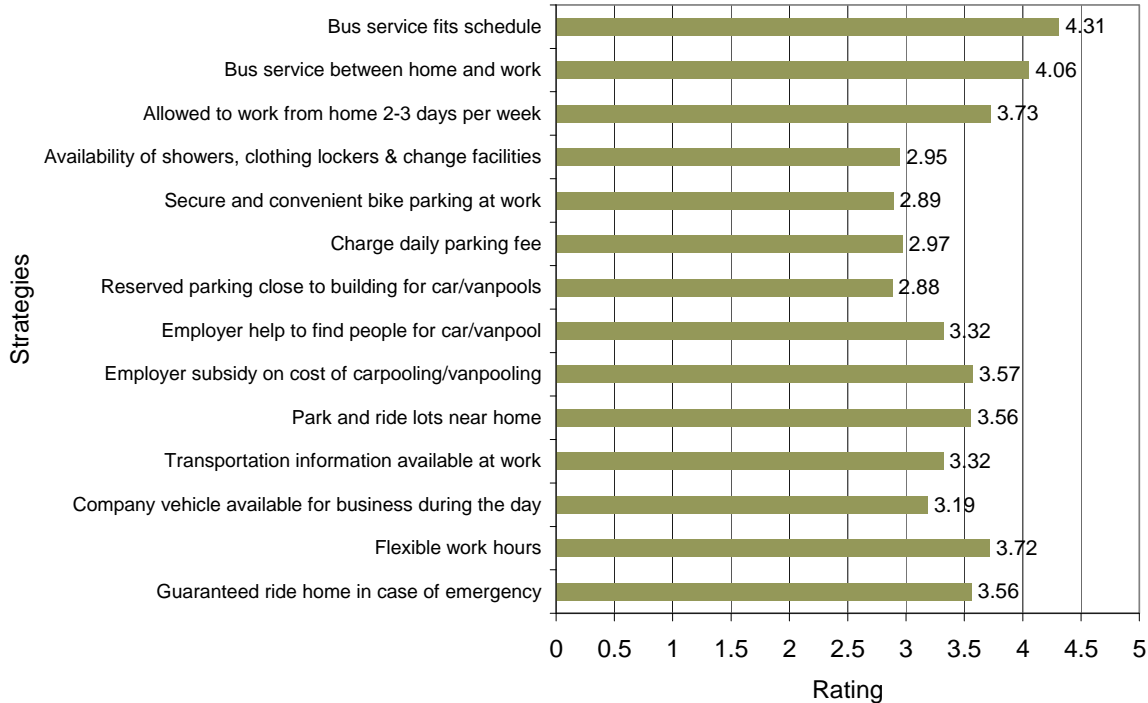
**Employer Strategies to Encourage Alternate Transportation**



Other (please specify)
No transit in area
There is a bus provided for those working 10 hr work days
I walk to work
I telecommute 1 day/week and work 4 X 10 hour days/week so only commute 3 days/week
Secure bike parking is not available
Company really does not provide any incentives, whatsoever
I actually do ride a bicycle quite a bit
one co. car is available for 10+ employees
Bus Service
I have a county vehicle
too far to walk and can't carpool
Walking path to work
Co. vehicle available but very few of them.
Bike parking. Or walking. I never drive.
Not really promoted at Big Sky
Contribute to Skyline Fund
Big Sky resort will do nothing.
Co-workers give rides when needed.

**Q-13: How likely are the following strategies to influence your consideration of taking transit, walking, cycling or car/vanpooling?**

**Strategies Influencing the Consideration of Alternate Transportation Methods**



Comments
I work out of town
Small rural town. public transit not likely
I do drop a child at school enroute to work and do errands on my lunch hour.
Bus Service is only available for those working 10 hr work days. Not the typical 8 hr work day my first choice would actually be to ride my bike, alas, I live too far away. there is actually a bus (operated by nps) that runs once in the morning, and once in the afternoon. unfortunately, my schedule will not allow me to take it, or get me involved in any carpools, either.
I would use bus service 1 day/week if it serviced my Bozeman address. 2 days/week I need my vehicle to travel between Helena and Bozeman, and the 4th day/week I telecommute from my home in Helena. (I work 4 X 10 hour days/week)
Bus service between my home and work is indirect so it would take considerably longer to ride the bus rather than make the short drive.
I live close to work
My hours are not 8-5, so if the bus service were more accommodating, I'd definitely use it.
bus service to the university from the county courthouse would be great
I already carpool with my husband, but we work odd hours, so it would be hard to accommodate our schedules without offering on the hour service, 24-hours each day.
I would take transit if it were available and my schedule worked around it.
My wife works for the State here in Bozeman. We drive together. If her schedule could be changed with mine or my schedule could be flexible to her's more things could be done for us. My job has too many State Statutes that govern my work hours to really work.
Getting my child to and from day care before and after work is my only deterrent to riding public transportation
It's more efficient for me to drive or bicycle because I live so close to work. I am often carrying materials, or needing to attend meetings further from home and that would be why I would drive. Each item I checked is important to me, though I already have the flexibility to work at home.
Bus service is through the National Park Service and you have to be able to work the hours they do so that you can make the bus each way. This is not feasible in my work.
Na
I already carpool with my children. My schedule varies frequently with appointments for myself and my children. It would be too stressful for me to carpool everyday with someone. If I was single with no responsibilities outside work, then perhaps it would work for me.
Because I live so close to work, I don't have much of a commute.
As a home visitor I use my vehicle to get around town to HV's. As noted there is only one county car for 10 +_ employees so it is not feasible to count on it to be available.
Current bus schedule is not flexible.
since I use a vehicle it doesn't apply to me
I would love to see a shuttle running between Gardiner, MT and Mammoth Hot Springs. I would use it daily, especially in the winter. My office hours would be flexible if I needed to adjust for shuttle times. A shuttle would also help with parking during the summer in Mammoth. It can be difficult some days to find parking.
I ALREADY WALK TO WORK EVERYDAY
Early morning bus times are great, especially ones that arrive at BS Resort around 7:30am.
Bus schedule is key! Lots of times and routes make it practical to ride
Last year I used Skyline more frequently b/c it arrived by 8am.
This will be my 4th season working in Big Sky. I have carpooled and driven myself over the last seasons. I have also lived in BZN, Gallatin Gateway and Big Sky, so my needs were different each season. This season I will be in Gallatin Gateway again and I hope to ride the bus, assuming it fits

Comments
my schedule.
I am the Children's Program Manager at Big Sky Resort Snow sports School. Many of my employees rode the bus last summer, both from Bozeman and from employee housing. Their concerns were that the bus arriving around 8:35 was often full and therefore not a reliable source of transportation.
The bus ride can take up to an hour to go 15 miles and is only available every hour, so most start times don't fit the schedules.
the bus schedule up to big sky in the morning is the problem.
I rode the bus every day because it was free way to get to work.
streamline in big sky could be every 15 minutes during busy time of day and 30 minutes during the early and after hours
I am within walking distance of work so do not require any of these options.
Employer should not subsidize carpooling nor charge for parking, but any alternatives have to be convenient. I would like to us able to work from home ear have 4-day work weeks.
There need to be bus stop signs so people know where to wait. It would also be helpful for those spots to have a bench & covered area to protect from the elements.
None
Nothing available in my area.
Bike lanes all streets
I'd love to ride the bus if my employer would be more flexible about my start time in the morning.
I have to take one child to school and another child to preschool. I also must run errands through the day for home.
I would take the bus every day if the route was shorter in time.
I am single so the bus schedule does not allow me to get back to daycare or school in Belgrade quick enough to pick him up in time. Also, I can't drop him off until 7:30am and I have to be to work at 8am. Not enough time to get to work on time and catch the bus.
again, THE BUS ONLY GOES ONE WAY, FROM THE LIBRARY I HAD TO DO THE WHOLE ROUTE TO GET BACK TO MY HOUSE 45 MINUTES LATER. MOST CITIES HAVE BUSES THAT GO BOTH WAYS.
NA
sign me up!
Since I have to have my car at work so I can go visit patients in their homes around Gallatin county I cant use public transit. unless I had a company vehicle to see patients in.
I walk 0.8 of a mile from the bus service, which is fine, but often have early meetings. Would like 06:35 service
I work 12-14 hour shifts, starting at 06:30 am, and can not be late as my pt work load is not very flexible.
if the bus started on an earlier schedule and if there was a bus stop closer to home
If bus came close to my door - a few blocks away.
Would love to see streamline come to Wheat MT at Three Forks to p/u commuters
I live in Three Forks and would love a bus schedule like Livingston is receiving
Need more bus routes to and from Belgrade. The airport would be a great site for a park and ride
Streamline bus just started this week between Livingston & Bozeman and I am going to try it
Bus to/from Livingston GREAT!!! More runs needed, al la Skyline.
I would ride the bus if it fit my work schedule of 10 hour days.
A bus line that went from Belgrade directly to Bozeman would greatly increase my choosing to use the transit system
NONE OF THESE SITUATIONS IS LIKELY TO EVER EXIST IN MY SITUATION

Comments
I work evenings, don't get off work until 1030-1200pm

Q-14: **If you are not willing or able to take transit, walk, bike or car/vanpool, please describe why.**

Response Text
No transit available in area
I am willing
There is no bus service by my home and I have to take my child to school in the mornings, as well as pick him up afterwards.
I can be at work in 10 minutes, but the transit would take me 45 minutes to get here.
Would be difficult as a manager when things go wrong and I need to drop and fix a problem.
Distance is a factor and the safety of riding on S 19th is questionable. I also work longer hours than most people.
If I was able to work the 10 hr work day I would not hesitate to take the bus!!! My employer does not allow me to work 10 hr work days. The bus system we have for work only runs for those working 10hr work days i.e.; Maintenance, HR, Support services and NPS employees.
The transit options are limited. The bus only runs at 6:45am and returns at 6:30pm. This does not work well for the 8-5 person. Also the bus pickup point is a round trip of 18 miles.
see above
MUST DRIVE CHILD TO SCHOOL EVERY DAY
I cannot run personal errands without my vehicle.
My line of works necessitates that I drive a company vehicle to and from work due to call-outs that I am subject to.
I live outside Manhattan and have to drive into Bozeman and drop my son off at preschool before going to work. There is no bus service at my home, and I have to make a school stop before going to work. Taking a bus isn't feasible.
company housing close to work
I live 90 miles from work, commute to Bozeman on Monday, stay in Bozeman until Wed, then commute back home (90 miles). There is no public transportation that works with that schedule from my home.
I do run personal errands at lunchtime to combine trips to town and avoid additional trips. This would be difficult to do without having my own vehicle here at lunchtime.
Bus service between my home and work is indirect so it would take considerably longer to ride the bus rather than make the short drive. Walking is problematic as I often have to attend meetings during the day outside the office that are too far to walk, which usually required me to take a considerable amount of documents and files too cumbersome to carry on such a walk.
Bus schedule is good for getting to work, but not for returning. My children's schedules effect my work schedule.
My hours are very early and many times I help my mom with jobs after work.
See above - my hours are not 8-5 and the times do not coordinate to ride the bus. Unable to walk or bike - too far, health issues. Car/vanpool - nobody drives the same hours as I do.
It must be able to take/pick up my child to daycare after school
see above.
I have a part-time job in addition to my full-time job.
I do not like the restrictions it poses upon myself and family.

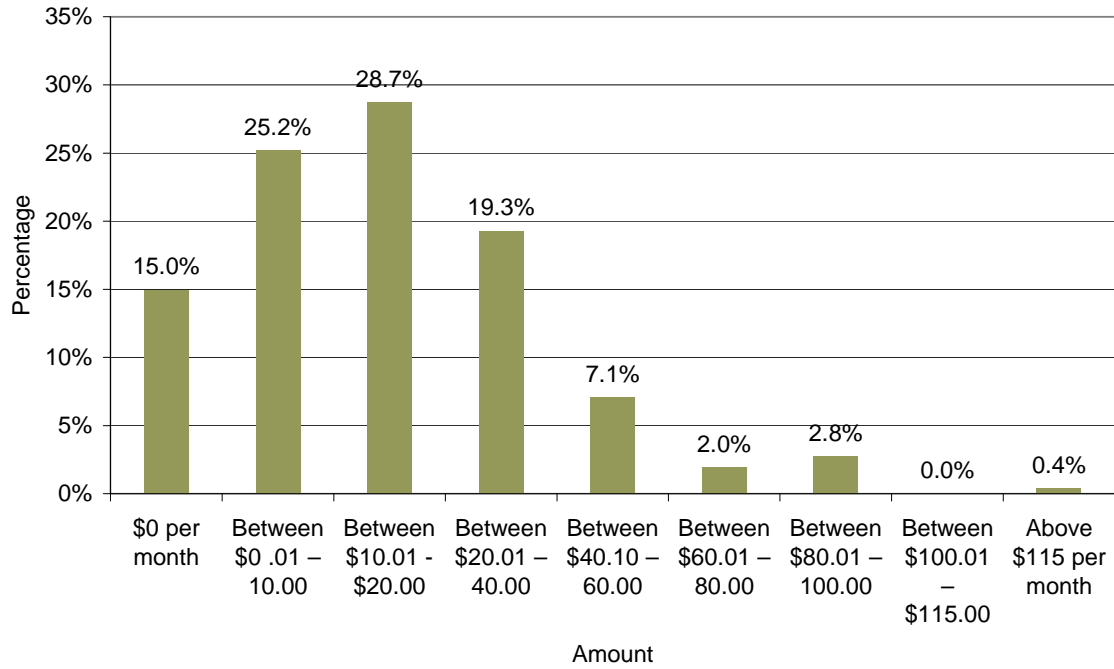
Response Text
My wife and I ride to work together. I will not walk or bike 10 miles one way. Poor weather would effect this also. We pick up items we need like groceries and other items on our noon hour to cut down an additional trip to town now.
See comments in #7.
I do use it occasionally, but it takes an hour for me to get from Belgrade to my place of work - one way. That adds two hours to my day...which is too much when I have kids in activities, etc.
My job requires travel within the county and my employer does not furnish a vehicle, but requires that I drive my own.
I do walk or bike.
I have young children. Public transportation is not an option and carpooling isn't flexible enough. Also, the commute from Belgrade to Bozeman by transit is 3-4 times as long.
See #7.
na
Winter--too cold
Have employer-assigned vehicle (patrol car) that I am required to drive whenever I work.
I would be willing to use alternative means of transportation if I didn't live 30 miles away
I already carpool with my children. My schedule varies frequently with appointments for myself and my children. It would be too stressful for me to carpool everyday with someone. If I was single with no responsibilities outside work, then perhaps it would work for me. It takes me 15 minutes to get from my house to work, I do not want to spend an hour getting to work. I used buses all the time when I lived in Colorado and it made sense as I would be on a bus for an hour reading a book or I could be in traffic trying to drive for an hour.
I live outside of the city limits, a mile from the frontage road. We need a bike or walking trail between Bozeman and Belgrade.
I live in Belgrade and need to get to Bozeman and once here need to get around to appointments, HV's and meetings.
Since I live close walking is also an alternative, however I have to pick up my children at school by a certain time so I am unable to walk because of the time issue.
Schedule at work varies.
I live too far out and there is no bus service
It is difficult to take a child to day care and get to work on time via the bus, same issue with picking a child up from day care after work and getting home
I live less than 1 block from my workplace and walk to work. I do not need to use public transportation.
I work nights and buses don't run.
sometimes I have to work late on little notice
n/a
There is no shuttle service available. There is not any type of "formal" car/vanpool system in place.
No bus service near home
Deputy Sheriff patrolling canyon section of Gallatin County
I am unable to take public transit because I am a law enforcement officer and take a patrol car home for emergency response from my residence.
I live in a rural area where services are not available; nor is high speed internet service or cable television; cell phones coverage is minimal
I live too far to walk or bike. it would be difficult to carpool as I have late night and early morning meetings on a regular basis.

Response Text
I would be willing if it were closer. I have to drive 3 miles to where Streamline stops. The car is already warmed up so I drive the other 3 to work.
Work at night so I have to drive myself.
I have medical appointments and leave work for lunch.
Work demands high degree of flexibility regarding travel. Quite often would have to travel back to Bozeman to drop Co. car off & then travel back to my residence thus wasting gas & time. Easier to plan trips late in day so don't have to come back to Bozeman.
To far to walk or bike, on-call 24/7, personal errands make the need for a personal vehicle necessary.
I love having the Skyline bus close to my home.
The biggest reason I do not take the skyline between my home in Gallatin Gateway and Big Sky is because my work schedule does not fit the bus schedule. Although I could catch a ride home, I have no way of getting to work in the morning. Carpooling doesn't work because I don't know anyone who works at Big Sky and lives towards Bozeman (granted I haven't tried hard), but most importantly because I work fairly odd hours, leaving no one who would the same shift as me.
n/a
not available early enough
Willing.
more convenient to drive myself
I enjoy driving myself
I would like to but it has not fit with the hours I work.
If the schedules meshed with my work hours I'd ride a bus often.
work is 7:30 to 6:00 most days and 6:00 to 6:00
days that it snows
none
Live out of town and need my car to run errands at noon.
I would like to, but it is difficult because the schedule does not match my work schedule very well.
I have two children who attend different schools. It is difficult to get them to and from where they need to be and still make it in time for work.
I have to take on child to school and another to preschool. I also must run errands throughout the day for my job. I am an elected official and use my own.
I enjoy the freedom of having my own vehicle at my disposal, so I can come and go as I please
I start work at 0530 and end usually 1700 or later. & I often come in on weekends. The bus doesn't come on line until after my shift starts.
To save on gas and my car has over 223,000 miles.
n/a
I HAVE 2 JOBS AND WOULD NOT MAKE IT TO THE SECOND JOB ON TIME. ALSO I DRESS UP FOR WORK AND DO NOT PLAN TO WALK TO WORK IN A DRESS ETC.
I need a car at work to complete job tasks. Also, the weather changes to much to ride my motorcycle to work. Plus I have to wear dress clothes to work most of the time and be presentable at work.
Carpooling would be hard for me because I have a daughter I have to take to daycare, and I don't work with anyone else who uses the daycare.
Convenience of multi-tasking on way to and from and during work day.
If it fit my schedule and ran between my home and work I would consider it.
NA

Response Text
I BIKE IN THE SUMMER, WEATHER DOESN'T PERMIT IN THE WINTER
I enjoy the freedom of traveling on my own accord.
transit schedule isn't compatible
Bus schedule takes 2 hours to get to work!!!!
see comments question #7
My schedule is just to wild with 2 jobs and a child; we live in Belgrade and work in Bozeman. I work 60 hours/week and don't know ahead of time when I will work late.
I would ride but a safe path is not available between either side of Belgrade and Bozeman. The over priced homes in Bozeman keeps me in Belgrade.
injury that prevents distance walking or bike
to far to walk-it takes me 45" on my bike to get here in the summer
2 jobs - trying to manage the time to be able to make it to the 2nd job on time. And walking any distance in severe weather.
Decrease fuel costs, and wear and tear on a vehicle
There is no bus service and I live 23 miles out of town. Not able or willing to bike.
It is about a 30 min. commute to take the bus from my house that is only a 10 min. drive or a 15 min. bike ride. I usually opt to take my bike or car, I would be much more excited about the bus if it was a direct route.
the rides are too infrequent at peak transportation times (early am and early pm)
I have two children to drop off and pick up daily from daycare. the park & ride in Belgrade is not close to the daycare. I'm also afraid that time would be too short to accomplish riding the bus with 2 little kids plus the car seat issue.
does not fit my schedule
Bus schedule may not work with my current work schedule
I have 1 child in school and 1 child in daycare. 2 separate stops before work and after work.
Current work requirements put me working past 6:00pm consistently. Commuting provides the needed flexibility
Taking the bus now increased my time away from home by 2 hours. It does not go straight from Belgrade to the hospital.
NONE OF THE BUS ROUTES GO BY MY HOUSE AND I WORK IRREGULAR HOURS
I TEND TO RUN ERRANDS HOWEVER, I COULD PROBABLY LESSEN THE DAYS FOR ERRANDS

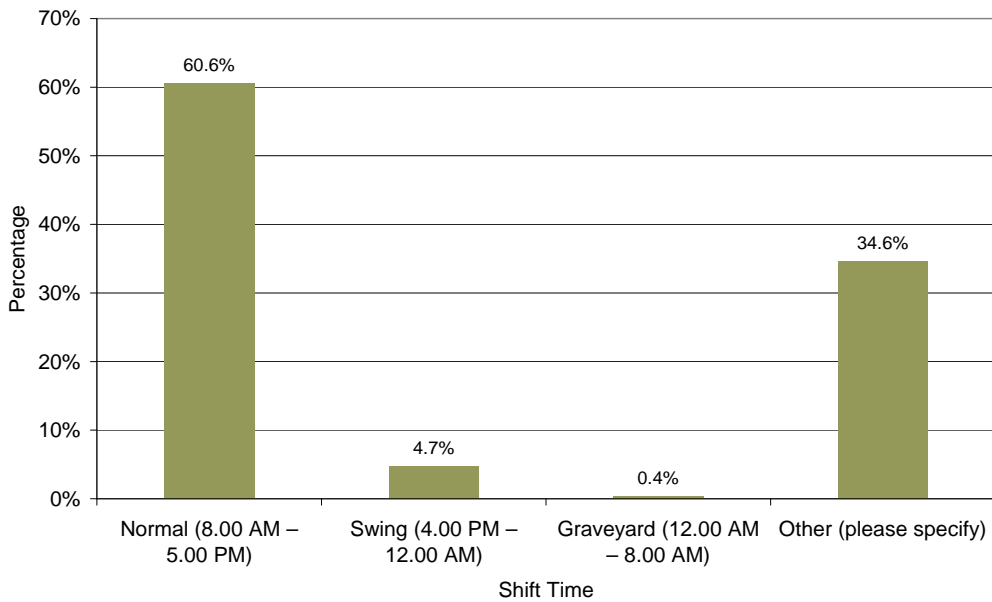
**Q-15: If there was a cost to obtaining a ride (using public transportation, car/van pools, shuttles, taxi etc.), what amount are you are willing to spend per month?**

**SW Montana Employee Willingness to Spend for Transit**



**Q-16: How do you describe your current work hours?**

Work Hour Distribution for SW Montana Employees



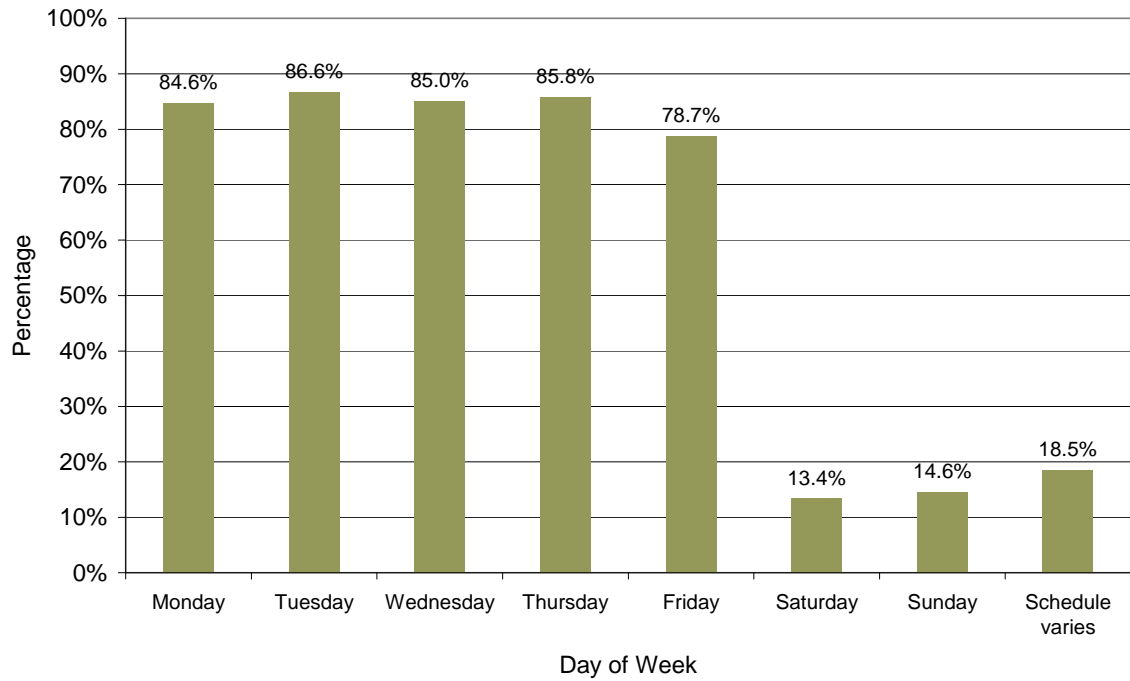
**Other (please specify)**  
6.00 AM - 2.30 PM

<b>Other (please specify)</b>
My hours vary. I put in more in the winter months
7:00 - 18:00
Work 9 hr days - every other Friday off
6a-3p
4-10 hour days (7.00am-5.30pm
6am - 4pm
7 AM to 4 PM; four days/week
7:00 am to 4ish
a variety of shifts throughout the week
4 X 10 hour days/week. (7 am - 6 pm)
8.00 am to 4.00 pm
2 days 8-4, 1 day 8-3
Normal except work later than 4 and also on weekends
early mornings
8:30 a.m. - 1:30 p.m.
8-5 with some evenings and weekend work
Normal for FT job, 6-10 shifts 2-3 days/wk plus Sunday at PT job
varies
varies
7 am - 4 pm
They change depending on the time of year.
four tens 0700-1700
6:30am-3:30pm
6 am - 4:30 pm tues-fri
7am-6pm, sometimes later
Work hours could be described as "Normal" but with frequent evening meetings.
7:30 am to 4 pm
6:00 AM - 4:00 PM 10 hour days 4 days on 3 days off
4, 10 hour shifts one day from home
11p-7a or 7p-7a or 11p-11a
May have to work late on very short notice
12.00am to 10.00pm
7am to 5 pm
7am to 6pm with early morning and late night meetings
7:00 AM - 3:30 PM
Normal + night meetings
Graveyard for 6 months, Normal for 6 months
4 1/2 days a week
7.00 am - 5.30 pm
Normal but on-call 24/7
Split shifts 8am-12pm, 3pm-8pm
7am-6pm or flex
shifts vary 10 AM - 9 PM
7:00 AM- 5:30 or 6:00 PM
6a- 230p

<b>Other (please specify)</b>
shift....seasonal...7a-2p or 2p-9p
rotating shifts at varying locations
24/7 365
can be between 7 am to 12 am
Longer daytime hours 6:30 to 6 often
8-2 or 2-8
9 or 10am to possible 6 to 7 pm
Schedule Varies
7:30am to 6:30pm
7.00toAM to 5:30PM other days 6:00AM to 6:00 PM
Part time 8-1:30
Part time, 9-3, Monday - Thursday
0530 - 1700 or later
7:30a-4 pm
7:30 to 4:00
6:30 a.m. to 3:30 a.m.
7:00AM-11:30AM
7 AM to 5 PM
8:30 to at least 5:15 or 6:00
8:30am - 5:30 pm
08:00 to 6:00 or later
8am - 4:30pm
07:45 - 05:30
As work load demands. Usually 07:30 to 18:00
50 hours/week full time job, 10/week 2nd job
06:30 start to 19:00/21:00 depending on shift
7 am to 6:30 pm and times between
I work 4-10 hour days
normal + 2nd job in evening until 9:30pm
8:00 to 6:00 to 6:30, depending on the day
6:45 am-5:30pm
varied
7:45am to 7 pm
0700-1700, 1200-2200, or 1400-2400
8:00 to 6:30
0730-1300
8:30 - 5:00
7pm - 7:30am
Only Casual Call so not frequent and hours are variable

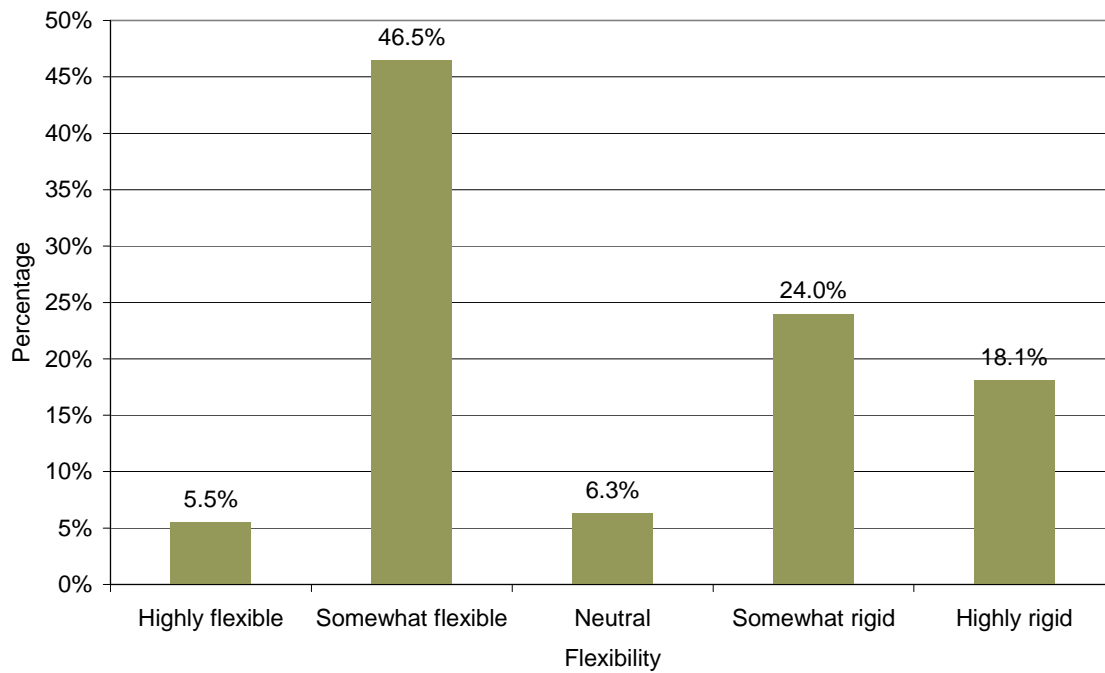
**Q-17: What days of week do you typically work?**

**Work Days of Week for SW Montana Employees**



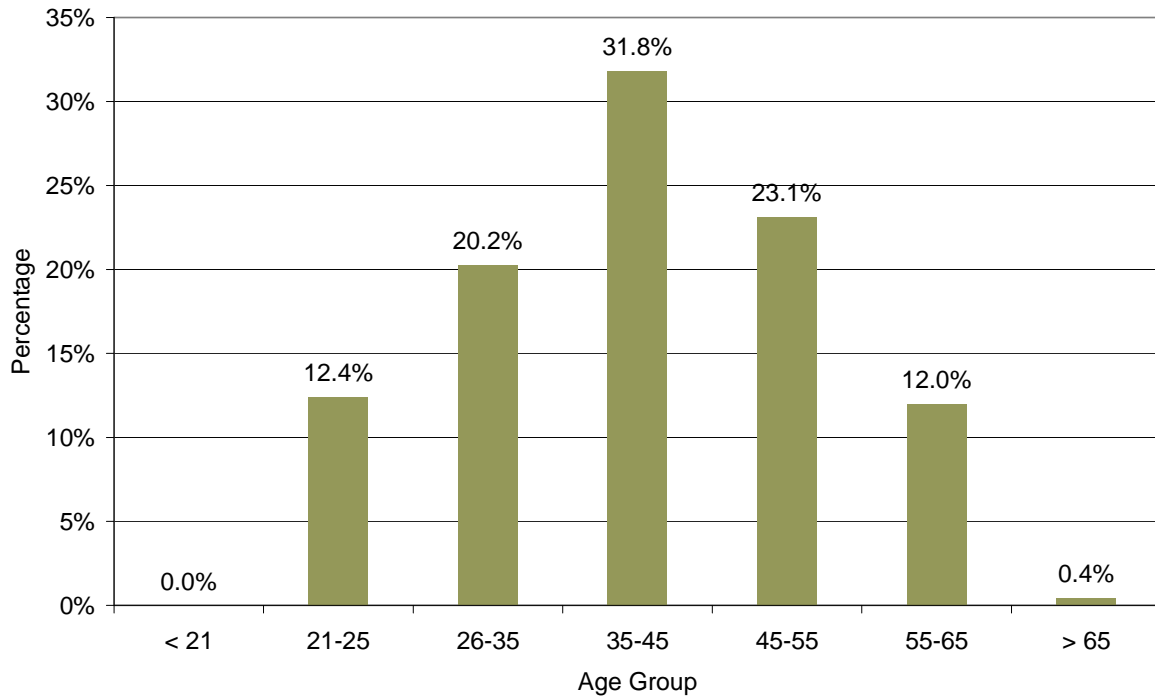
**Q-18: What level of flexibility do you have in your work hours?**

**SW Montana Employee Work Hours Flexibility**



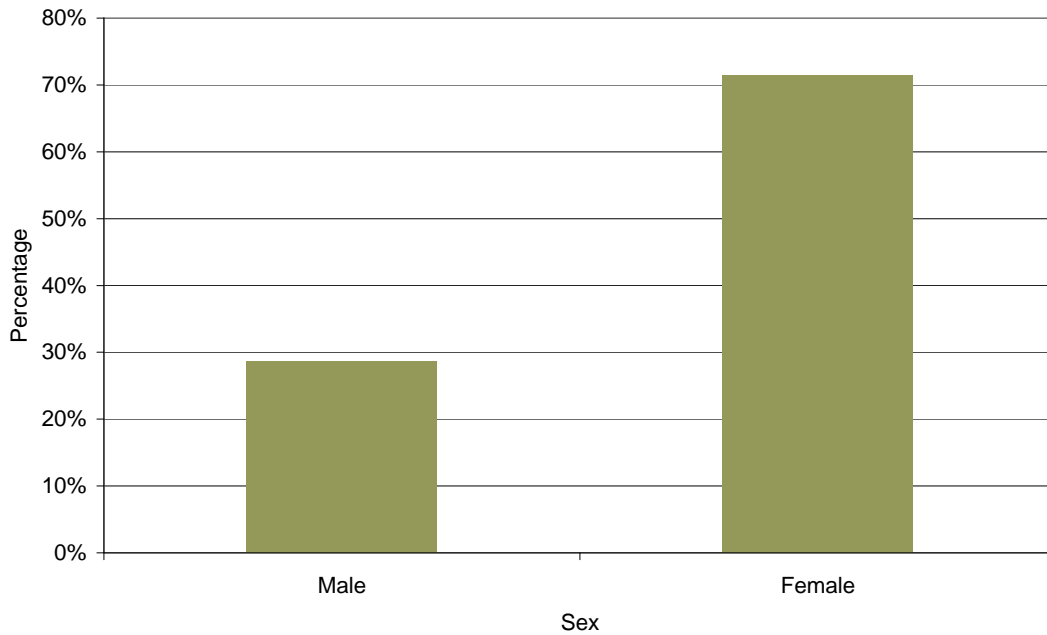
**Q-19: How old are you?**

**Age Distribution of Participants in the SW Montana Employee Survey**



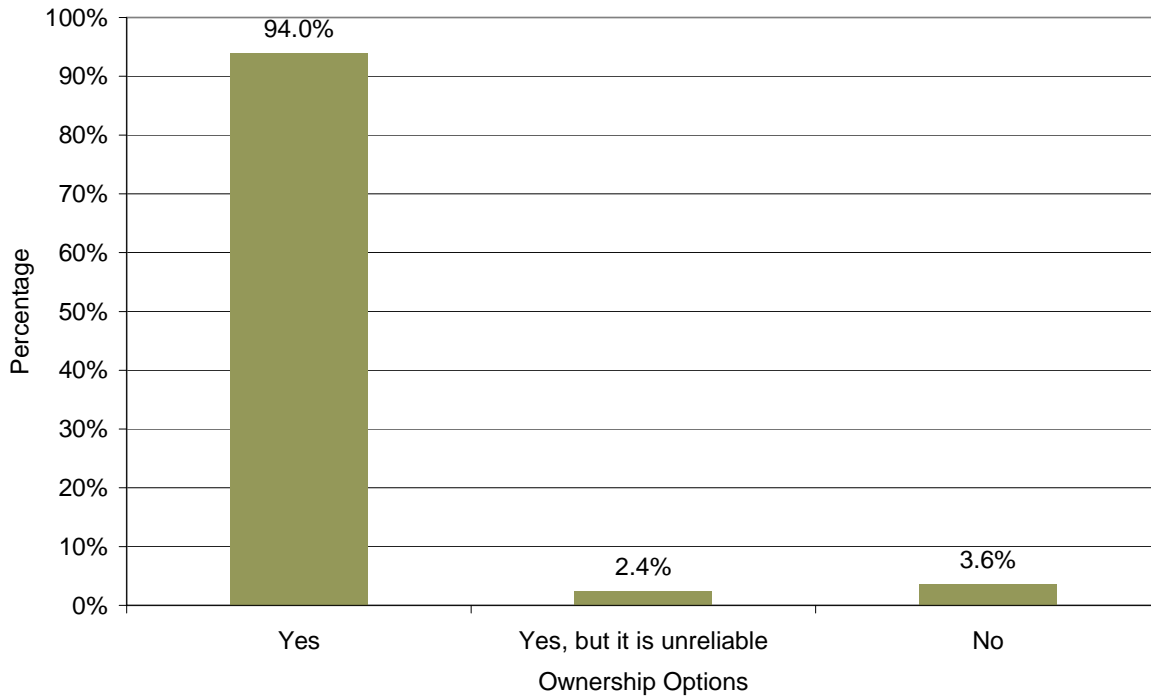
**Q-20: Sex**

**Sex of the SW Montana Employee Survey Respondents**



**Q-23: Do you own a personal vehicle?**

**Employees Owning a Personal Vehicle in SW Montana**



**Q-24: Do you have any other questions or comments?**

Response Text
I hope you can encourage a stronger public transportation system throughout our region.
I am a proponent of public transportation. I wish there was train service linking Montana cities (Billings-Bozeman-Butte-Missoula-Dillon-Helena-Great Falls). I can not use the local bus service in Bozeman because I live out of town without bus service and have to do a preschool drop off prior to going to work in Bozeman. I do not believe the local bus service should be no charge. I grew up in a large city (Milwaukee) and had to pay a dollar for a bus ride back in the late 80s/early 90s. That is a minimal charge and would help off set costs of high gasoline prices. I also spent time working in a large city (Chicago) and took public transportation every day to work (the El or Metra). My employer subsidized the cost of the mass transit costs by giving me a transportation check every month, and also let people work at home up to 2 days a week. I do not have that option here.
Light rail commuter train serving Three Forks to Manhattan to Belgrade to Bozeman should be built.
My commuting to and from work is easy because of company housing near my job. But my job is in Yellowstone National Park. Therefore, the commuting I do is for shopping, paying bills, car repairs, etc, which takes 2-3 hours to get to Bozeman, or Cody, or Idaho Falls to do these chores.
Other counties provide many more company cars to their employees for use around the community while working. Ours does not, and I believe this would be a great way to encourage individuals to walk or bike to work, when they know there is another car there waiting for them (most of our employees use their personal vehicles for company purposes). Furthermore, in order to save on energy costs, we have many employees here who are big

Response Text
proponents of four-day work weeks . . . imagine the savings!
I work for Gallatin County. State Statutes dictate when we are open and when we can close. There is no flexibility for myself or my staff to flex or do 4 10's to close the office or even to cut one commute a week for my employees or myself. My wife and I ride together and attempt to do our shopping and personal business on our noon hour so we can cut out a trip or more to town. We live 10 miles from work and both have to dress in a professional manner so walking biking is out of the question. To carpool with others would cut out our ability to take care of our business in town on our noon hours.
I have ridden the Streamline on several occasions, mostly to save money when gas prices were over \$4 a gallon. I would ride it more often if it didn't take so long to get from Belgrade to my office (two hours round trip).
I was happy to see that Streamline is now available on Saturdays, but only limited hours. Please consider adding hours on Sat/Sun schedules so that those persons working "odd" hours would be able to use the bus. Those people that are working minimum wages jobs at Wal-Mart on the weekends are the ones who cannot afford cars. Thanks!
I would be more interested in transportation between Gardiner and Livingston and Bozeman, Montana. Having to drive to a "big" city for staples and hardware and paper goods and repairs gets a little costly. Having transportation options would be nice.
I have looked into using the Streamline but have been discouraged. The route from Belgrade to the courthouse would take up to a little over one hour and includes switching routes at MSU after a 14 minute wait in between. Also, would there be an option to get dropped off at the parking lot entrance of the courthouse since the Streamline is going right by it but it is not an official stop?
I bike or walk every day. I only live about 6 blocks from work. Cost of housing is the biggest driver of my transportation cost. I am able to rent an apt within 6 blocks of work; if this was not available, I'd have to evaluate other methods of transportation.
A car is required for my job for various errands. One county car is available to my office, and used by someone who has priority due to distance. This makes it necessary to have my car at work.
I would like to see a more comprehensive bus service established and would definitely not mind paying to ride as long as it was not a higher fee than my current gas costs.
I love the bus from Bozeman!
I work in a department that sees how crucial it is to have a free bus to and from work for the 1000+ employees that work at Big Sky resort. My friends and I use the bus because it is free, and probably wouldn't even if we had to pay a minimal fee for it. It is reducing the number of cars on the road and highway 191 and reducing emissions because of it, helping our environment. I know that gas and labor costs are high, but what is the price of a life that is saved on our roads or the cost to the environment of the 30+ car emissions saved by those individuals not driving? If the powers that be keep subsidizing it, it will remain a very helpful part of our community.
I appreciate the Skyline bus, it works out great for me. I would even be willing to pay a modest fee for it to continue on current schedule.
The skyline bus has made Rt 191 so much safer! Please continue to support these public transportation funds!
I live close enough to walk to work but bus service is provided during the season if needed. I do use the bus to commute at least twice a week to & from work from my boyfriend's house. I love the public transit system that we have available to us in Big Sky. Having no personal vehicle it is all I use.
I intend to move to Bozeman eventually and still maintain my job in Big Sky. I hope that commuter services will continue.
Thank you for the great service. I feel that the link from Bozeman to Big Sky is a critical component to the program. It reduces the number of vehicles on 191 creating a safer and more

Response Text
environmentally friendly road. The link service benefits guests to Big Sky, Bozeman/Belgrade residents and businesses.
I am unable to walk distances due to knee problems.
Please find funding to keep the bus going later in the evening. I do use the bus and notice the service hours only accommodate a small portion of the town. I work late and therefore have no way to get home past 11pm and I am not hitch hiking. I live in a town where a lot of the employees get off after 11 pm and probably would use the bus if it were available. Also a late bus would stimulate the nightlife in Big Sky. A frequent comment made in Ski publications is a lack of good fast transportation and a nightlife. If you could get around town it might finally stimulate the nightlife and economy.
late night routes to stop drunk driving.
I love the skyline bus. I hope they never get rid of it. the only thing is I wish it would run later maybe 1 or 2 am just because I have to work some later hours.
A few suggestions: Increased hours of service will relieve concerns of making it to work on time as well as the fear of having to stay a little late and not being able to make it home. I believe most people would be willing to pay a couple of dollars per day to ride a bus if they knew there' be enough seats and the hours of service worked for them.
I do live fairly close to work and am able to take back roads. A bus would not be convenient but I would like to bike but changing/showering is an issue. I would/could carpool as an option. I do like the idea of 4 day work weeks. UTAH has begun this in their court/city/state offices to save money.
I do not want another service that would increase our taxes!!!
I think the government should do all it can do to encourage its employees to take public transportation and that includes allowing community employees to have flexible hours.
I bike about 40% of the time and drive about 60% of the time. Most of the winter, biking just isn't a real option. In the summer and fall I can bike almost every day is rain is not the forecast. The Streamline bus actually goes by my house at about 7:15am each day and I would ride if I could. But my works until after that time and I need to be home with my 4 year old.
I would really like to see either a bus pickup closer to River Rock or a time adjustment to the schedule so it doesn't leave quite so early. However, I understand the difficulty of the total scheduling of routes.
Shelters at Rocky Mountain Supply and other stops (like College & 16th) would be great, in winter especially. I may not ride Streamline in winter because I have to wait so long to get picked up.
There are many people who work at the L&J Center. If there could be a specific bus that had perhaps a 1/2 hour route from Annie to the L&J, I would take the bus everyday, even pay for it!
A transit system can be very beneficial. However, I feel Bozeman is too small as people will say they will commit and then not follow through leaving the rest of the people to pay for the bus. I feel each person should buy their own ticket or tickets to ride the bus and they can pick what days to ride. It should be each individual's paying their own way.
public transportation is a good idea. I sometimes have to work into the evening, when Streamline is not available.
I THINK THE BUS DRIVER NEEDS TO BE FLEXIBLE WHEN PICKING PEOPLE UP ALONG THE ROUTE, ONE DRIVER ON SATURDAY, SAID HE IS NOT SUPPOSED TO STOP AT NON OFFICIAL BUS STOPS. WELL I AM NOT GOING TO WALK 4-5 BLOCKS TO THE END OF MY STREET (CHERRY DRIVE) THEN 2-3 MORE BLOCKS TO THE OFFICIAL STOP ALONG HIGHLAND. HE DID PICK ME UP BUT COMPLAINED. ON DAYS I DON'T WORK SECOND JOB, I COULD PICK UP THE BUS AT THE HOSPITAL AT THE END OF THE DAY, BUT THEN HAVE TO RIDE THE FULL HOUR TO GET BACK TO HIGHLAND BLVD.
I commute to work by bicycle nearly every day, when roads/streets are not icy.

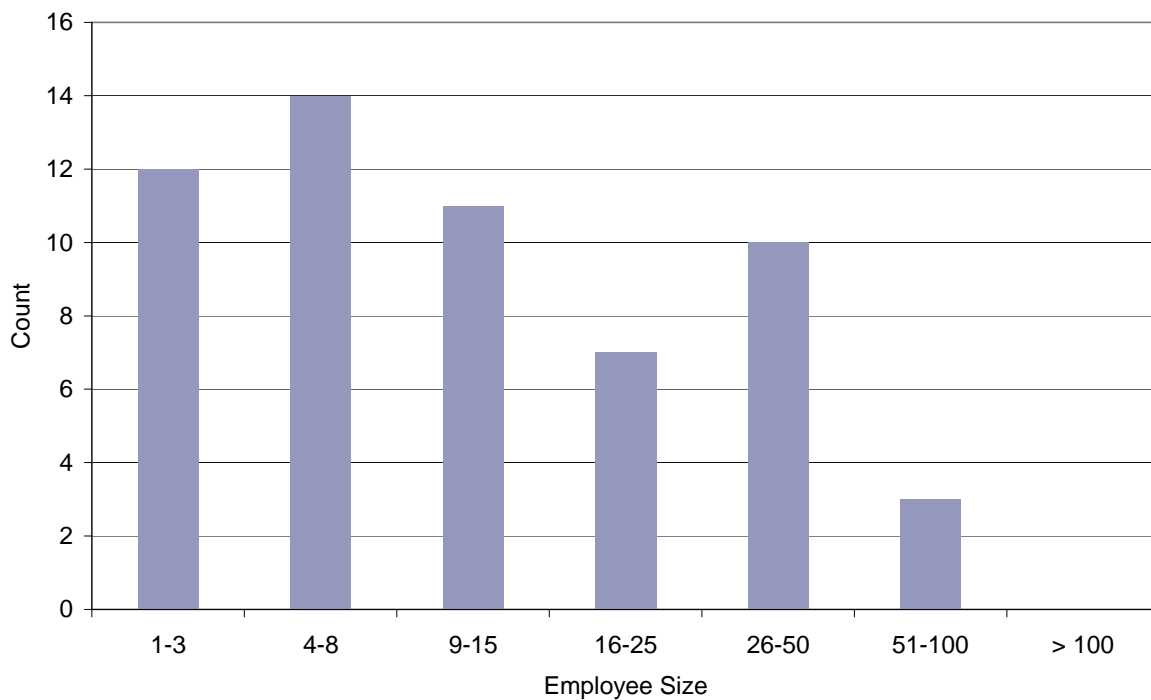
Response Text
When road conditions are icy, I will drive personal auto most days.
My husband and I only have one vehicle. We decided to try it out to save us money, it has been hard but we have made it work. It would be great to have more options for car pooling, public transportation etc.
The skyline bus is fantastic for both guests and employees. It makes the canyon so much safer!
Thanks for working on this!
I think for a lot of people, this would be a great option. I wish I were in a position to be able to take advantage of public transportation.
what is the hold up on a safe bike/walk way between Bozeman and Belgrade, Bozeman can build a trail network from town to the mountains, but I still have to waste gas to get there. I refuse to ride to Bozeman at this point due to lack of trails, and even decent shoulders on the main roads-it is not safe. I would ride at least half the time, if not more, if the path was clear and safe- it does not even have to be paved, just there and easy to follow.
Again, love the Skyline. Streamline needs to run later 7 days/week. At least until 8 or 9 pm. I realize the Livingston service is spanking new, but more runs would be sweet. Thanks!!!
I bike when weather cooperates- when temp is above 40, under 90, dry, and wind is under 10mph.

# Appendix C: Bozeman Employer Survey Results

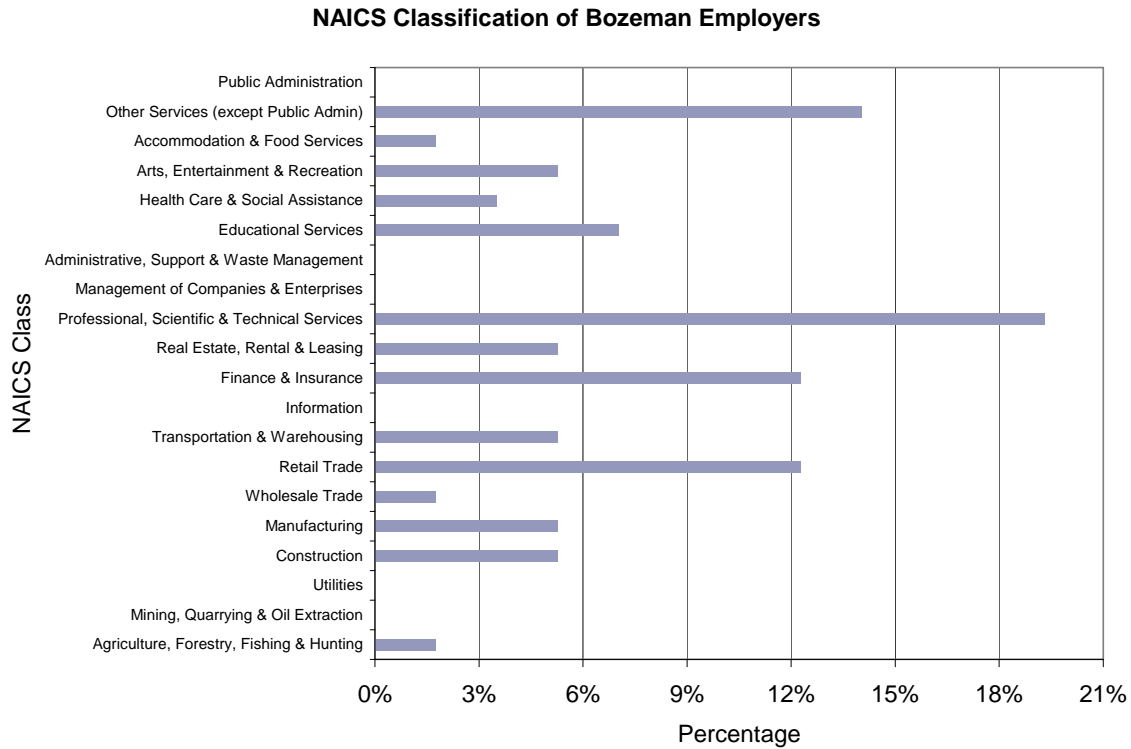
This short employer survey conducted with the help of Bozeman Chamber of Commerce targeted the employers in and around the Bozeman region. The major omission in this survey is the employers' estimate of employee commuting pattern. However, it provides a larger sample to gauge the importance of TDM strategies, willingness to subsidize the cost of transportation, steps taken to promote alternate transportation methods etc. The results of the survey are summarized below.

## Q-3: Total number of employees

Employee Size Distribution for Bozeman Area Employers



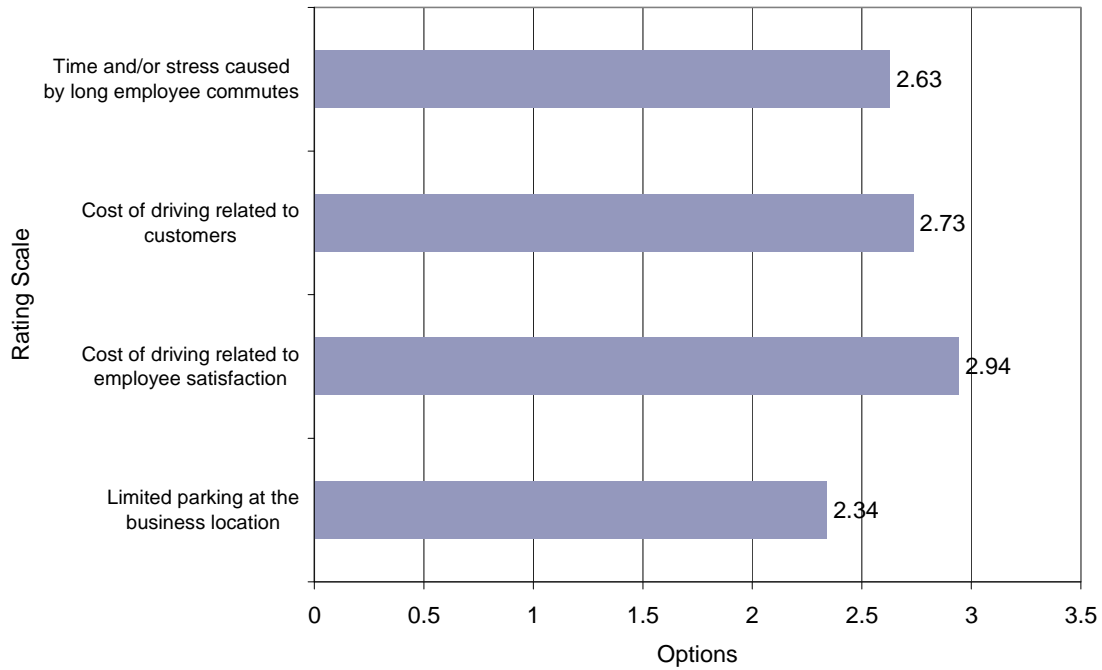
**Q-4: Which NAICS industry sector best classifies your business?**



**Q-5: Rate the impact of the following items on your business.**

<b>Other (please specify)</b>
The longest commute is 7 miles, most are within 3 miles. Bicycles are used regularly by 1/3 of employees for commuting. Several others walk or take Streamline.
the majority start at 5:AM

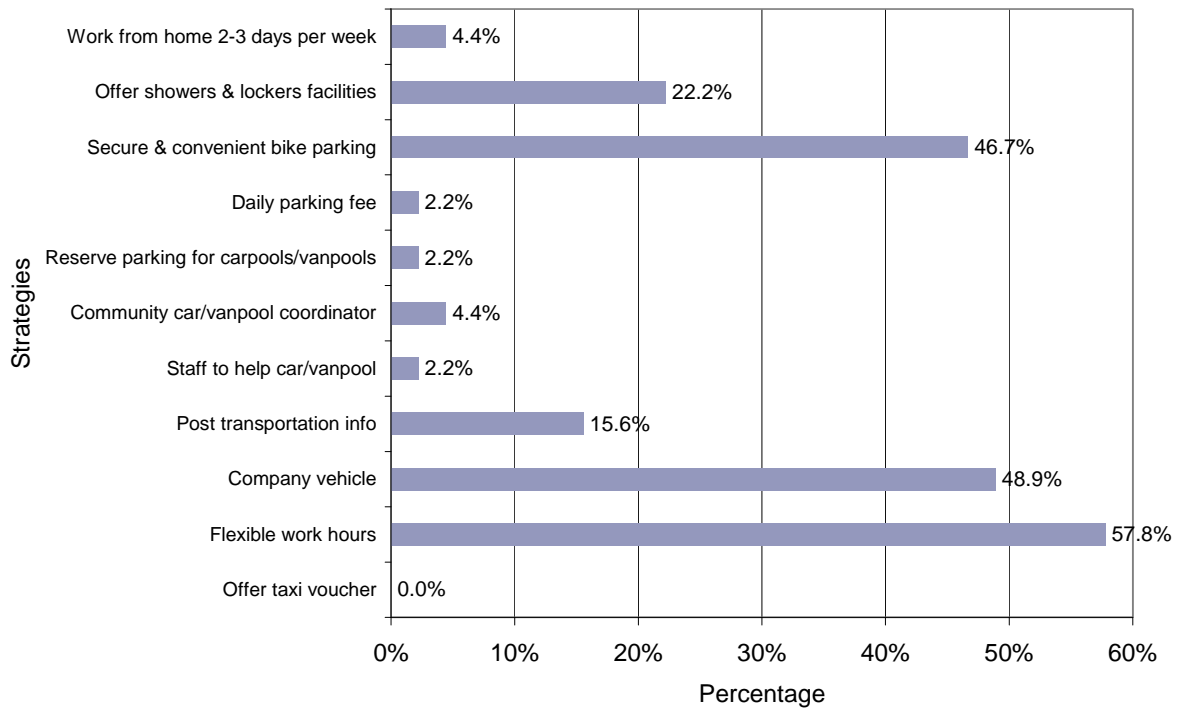
**Bozeman Area Employers' Perception of Commute Cost**



**Q-6: What strategies do you have in place that encourages taking transit, walking, cycling, or car/vanpooling to work?**

<b>Other (please specify)</b>
Federal Transportation Flex savings plan
Allow employees to work 1-2 days at home or work four 10 hour days

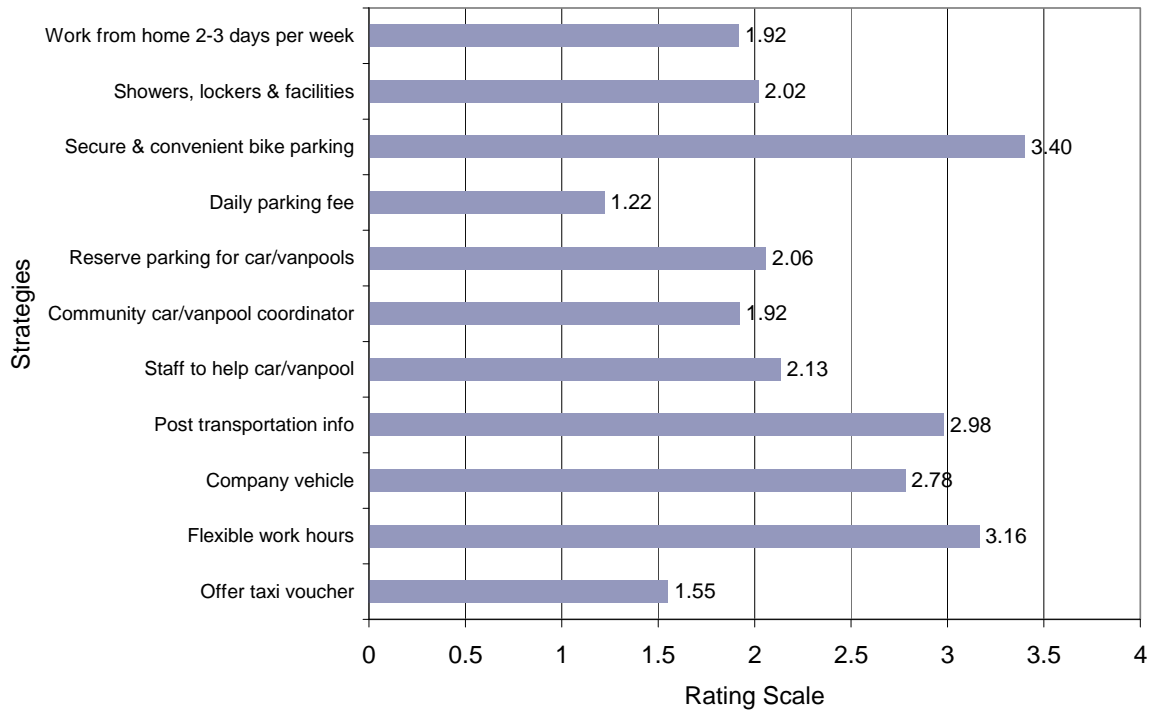
**Bozeman Area Employer Strategies to Promote Alternate Transportation**



**Q-7: How likely are you to consider implementing any of these strategies?**

Other (please specify)
With limited employees and rigid work hours, most of this doesn't apply to my business
Federal transportation flex savings plan
four 10-hour days

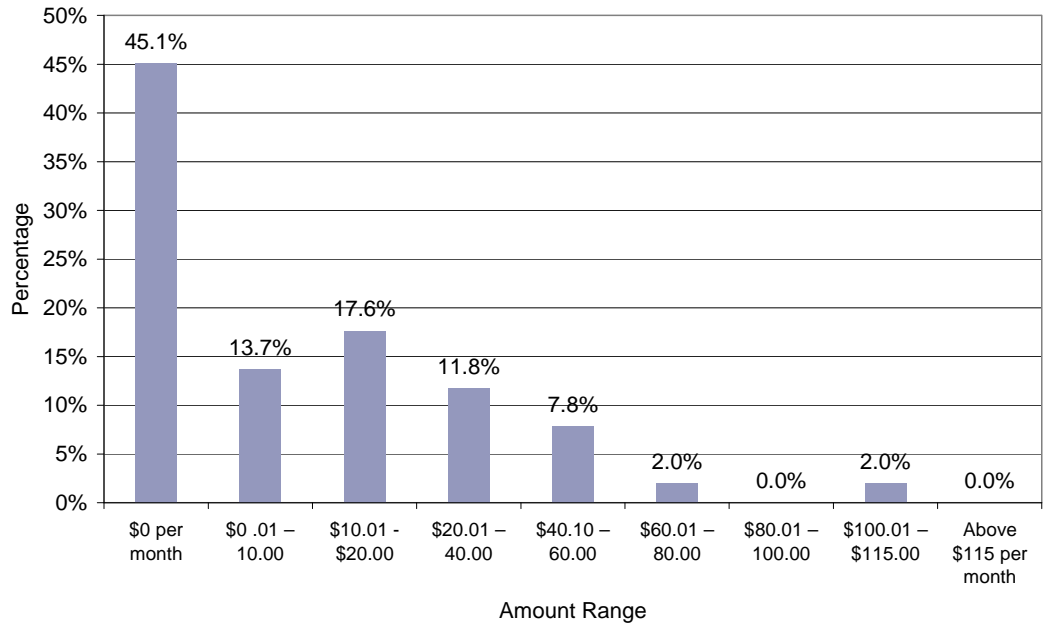
**Bozeman Area Employer Rating of Possible Strategies for Alternate Transportation**



**Q-8: If there was a cost associated with public transit, carpooling, or vanpooling, how much would you be willing to pay per employee? (Federal law allows employers to offer tax-free benefits up to \$115 a month for transit fares or carpool/vanpool costs.)**

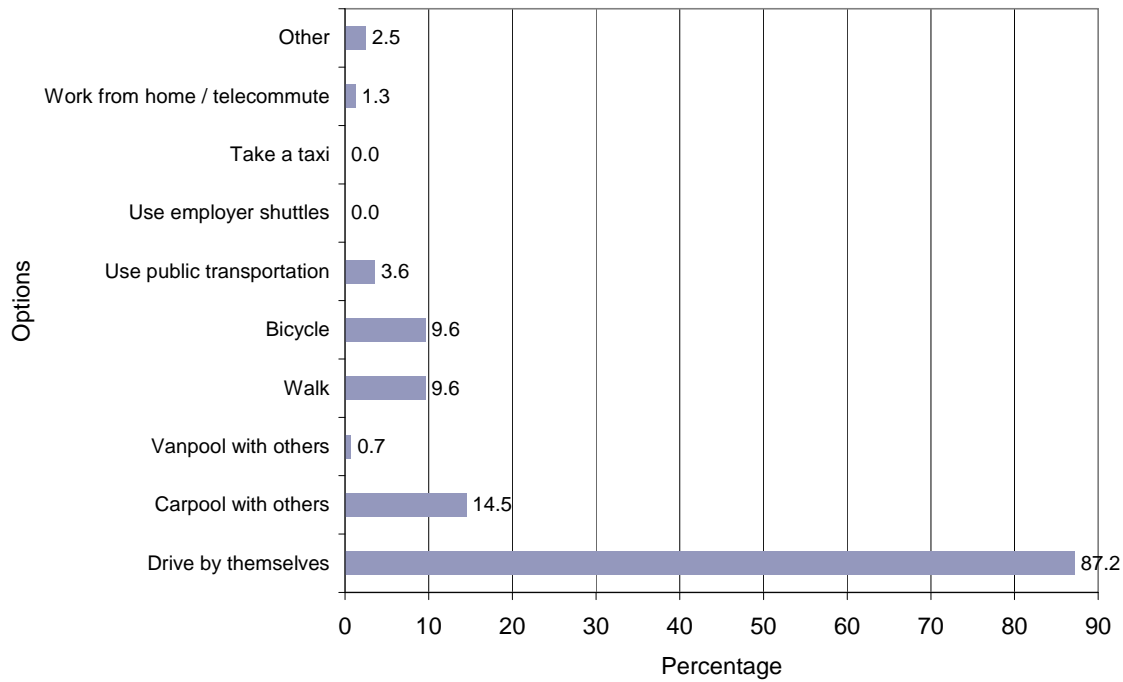
Other amount or funding (please specify)
would vary depending on expense. would offer flex account
Our firm offers this, but no one in the Bozeman office uses it. They do in NYC however.

**Bozeman Area Employers' Willingness to Subsidize Public Transportation Costs**



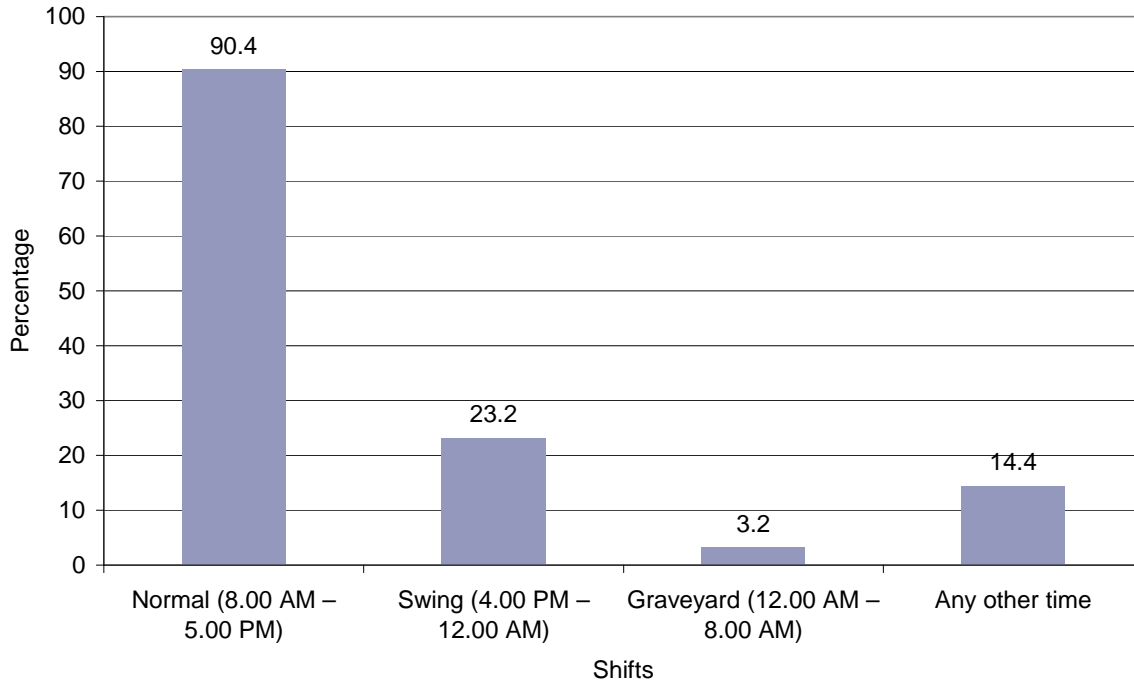
**Q-9: Based on the best knowledge available to you, what percentage of your employees travel by the following modes (must add to 100)?**

**Bozeman Area Employers' Estimate of Employee Travel**



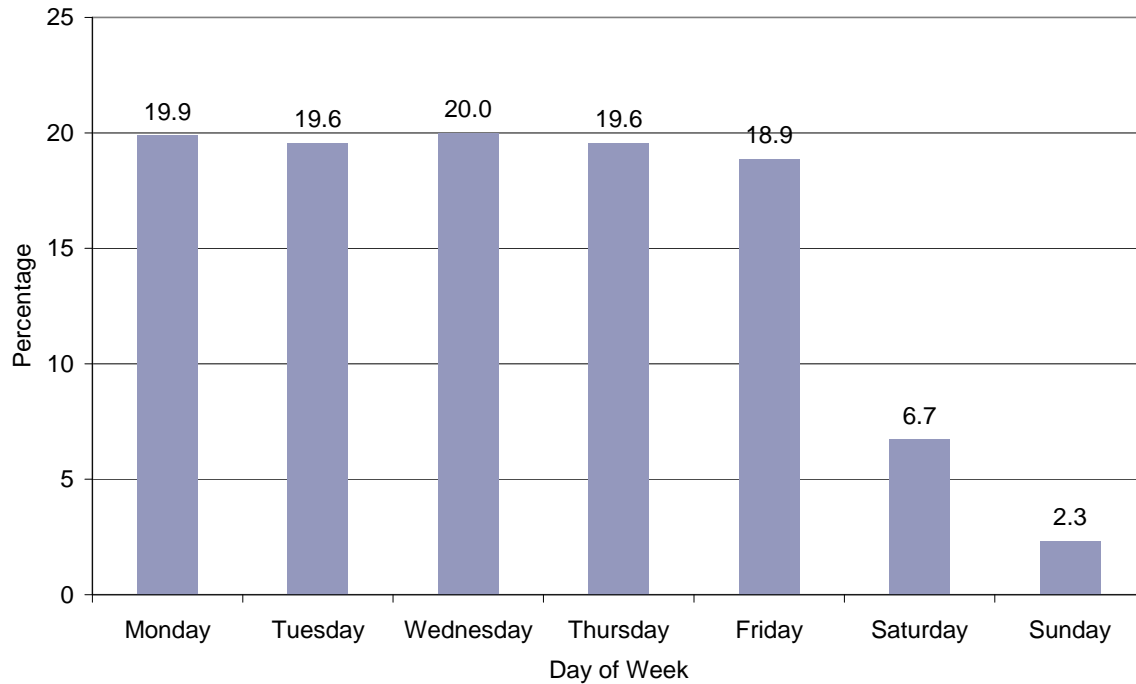
**Q-10: What percentage of your employees works the following schedules (must add to 100%)?**

**Bozeman Area Employers' Estimate of Employee Distribution by Shifts**



**Q-11: How are your employee shifts distributed (by percentage) by day of week (must add to 100%)?**

**Bozeman Area Employers' Estimate of Employee Distribution by Day of Week**



**Q-12: Do you have any other questions or comments?**

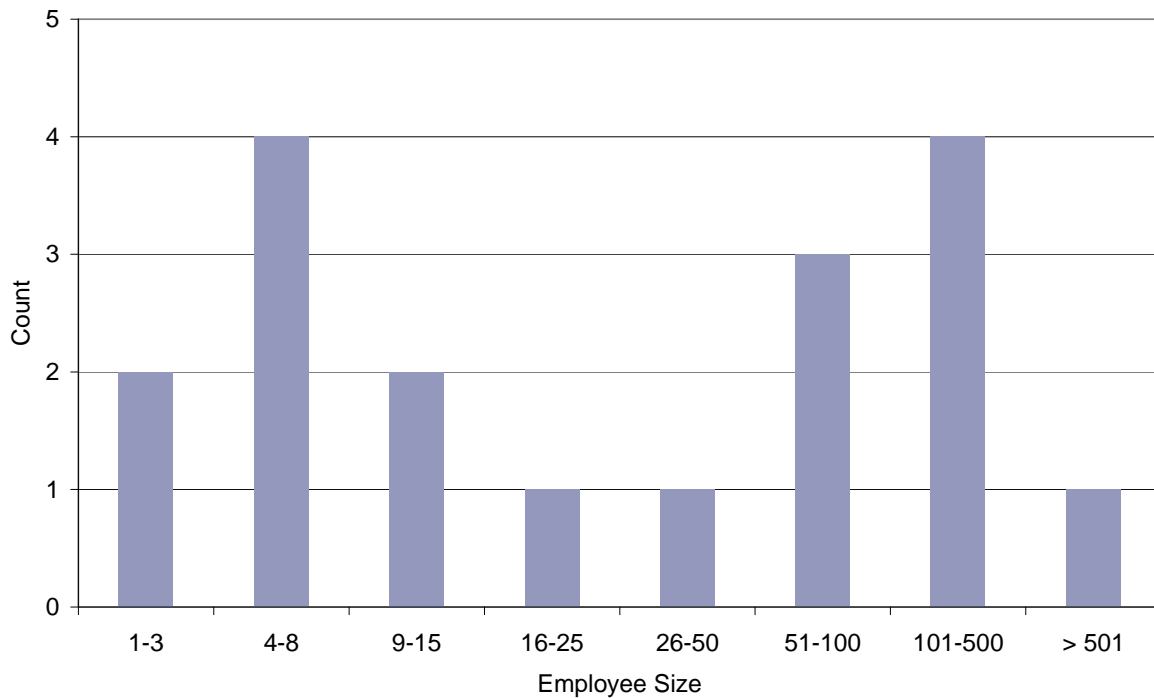
Response Text
A third of our staff is outside sales... they are the hardest hit and yet by nature of their job have to travel. We allow a great deal of flexibility to work from home, use technology to it's fullest capability, but the end result remains the same customers must at some point be visited. This minimizes opportunities for these employees to carpool or take public transportation.
We have many functions off site. In those situations we offer company transportation and carpool coordination
Looking into biking more often next summer, not practical in the winter
Availability of transit, Streamline, from Livingston M-F?
The cost of travel is very expensive for everyone. Until we stop talking about energy policy and actually implement a policy that lowers gas prices our economy will not pick back up. By the way the price of oil is down 40% since the highs this summer yet the price of gas is still high and is not following the same trend. The cost of fuel should be below \$3.
How much has public transportation cost us the tax payers this summer with the high prices of fuel and what was the decrease in in highway taxes from the decrease of fuel sales from the amount of people riding bikes, walking and taking advantage of a free bus ride.
Associates live near the business We provide bicycle racks and there is plenty of parking.

# Appendix D: Long Employer Survey Results

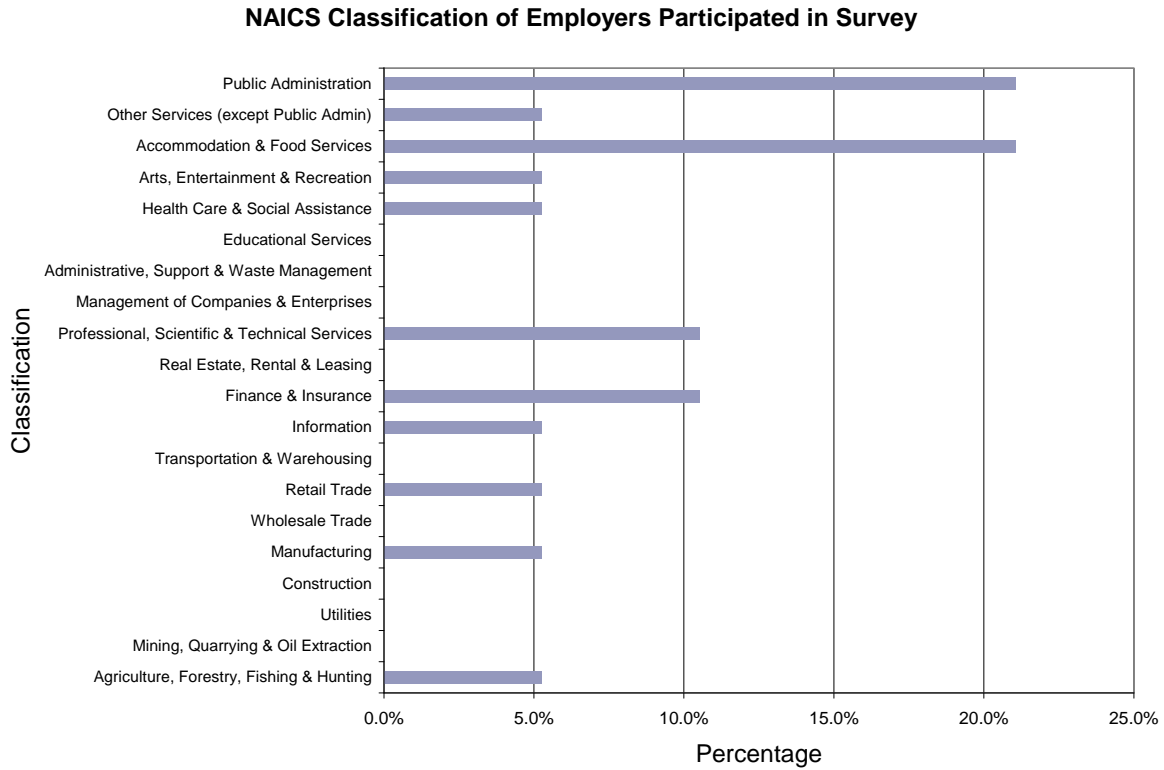
The long version of the survey targeted the largest employers in each county. Both public and private employers were included. These employers also used the employee surveys to augment their survey responses.

## Q-2: Number of employees that regularly commute to this location

Employee Size Distribution from SW Montana Employer Survey

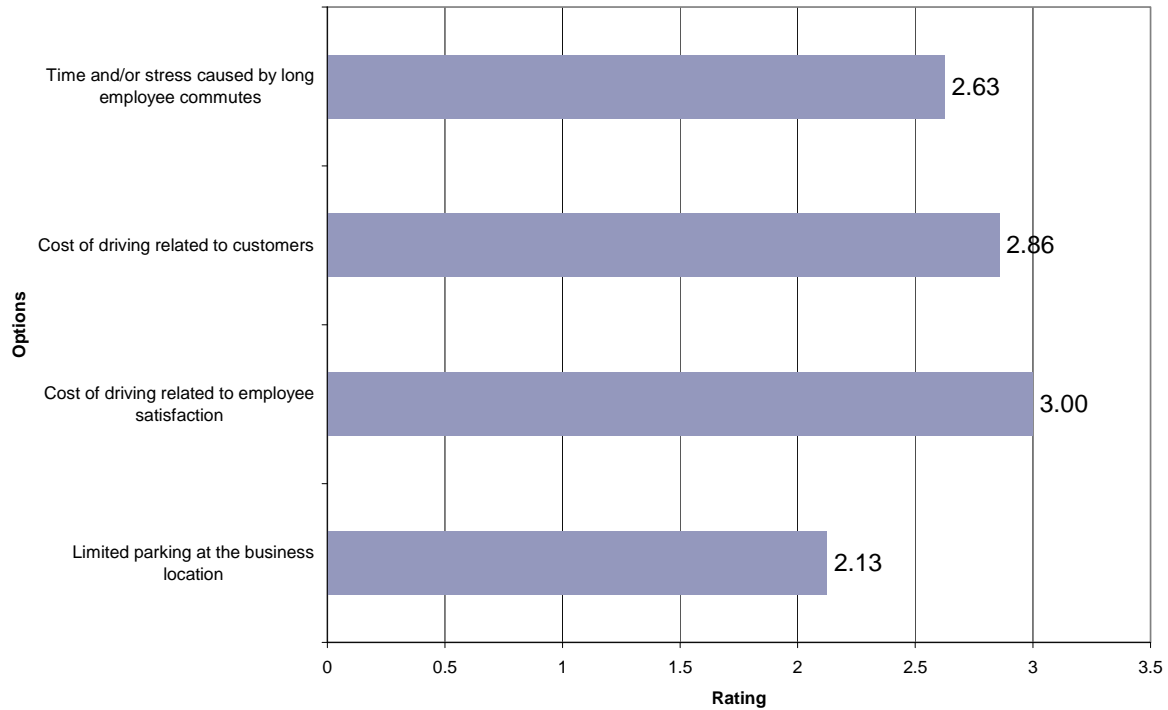


**Q-5: Which NAICS industry sector best classifies your business?**



**Q-6: Rate the impact of the following items on your business.**

**SW Montana Employer Perception of Commute Costs**

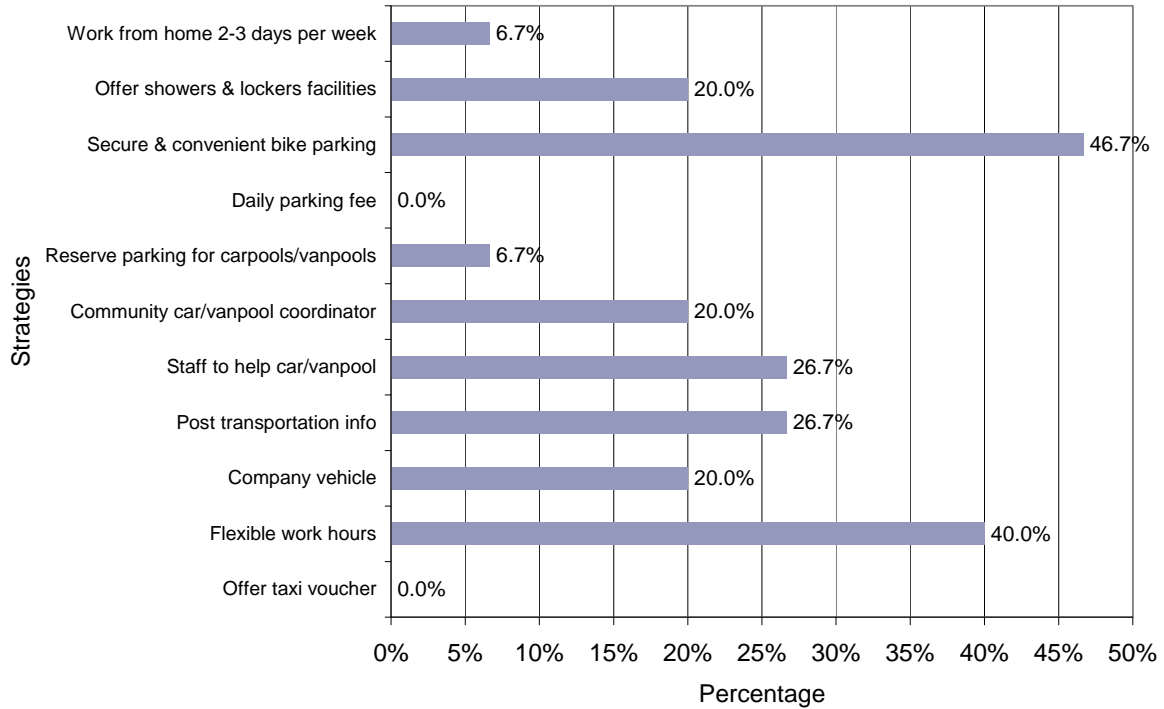


**Other (please specify)**

Our auditors often commute to businesses around the state to perform their work, so commutes of 1 or 2 hours are common. They charge their mileage to the company, and I think most employees aren't overly stressed by the commute, but it does decrease their productivity time.

**Q-7: What strategies do you have in place that encourages taking transit, walking, cycling, or car/vanpooling to work?**

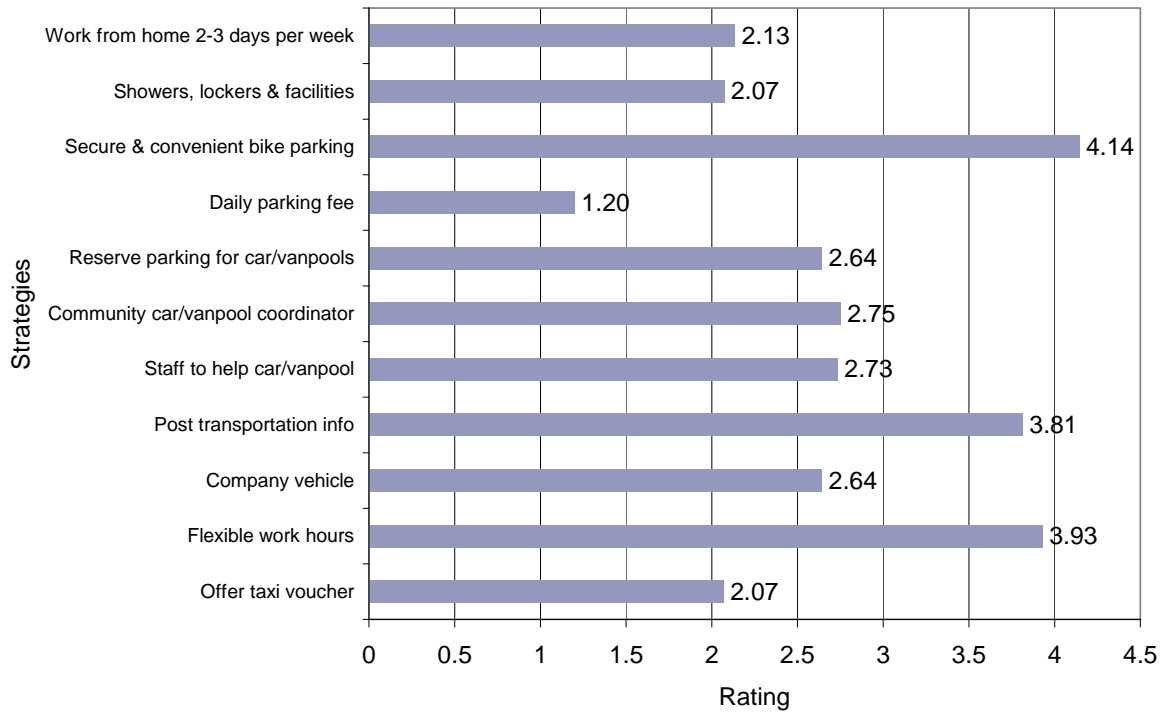
**Existing Strategies for SW Montana Employers to Promote Alternate Transportation**



Other (please specify)
Does not apply
community bus through Paradise Valley
Rideshare electronic board
Some positions are flexible. We contribute to the Skyline Bus Fund

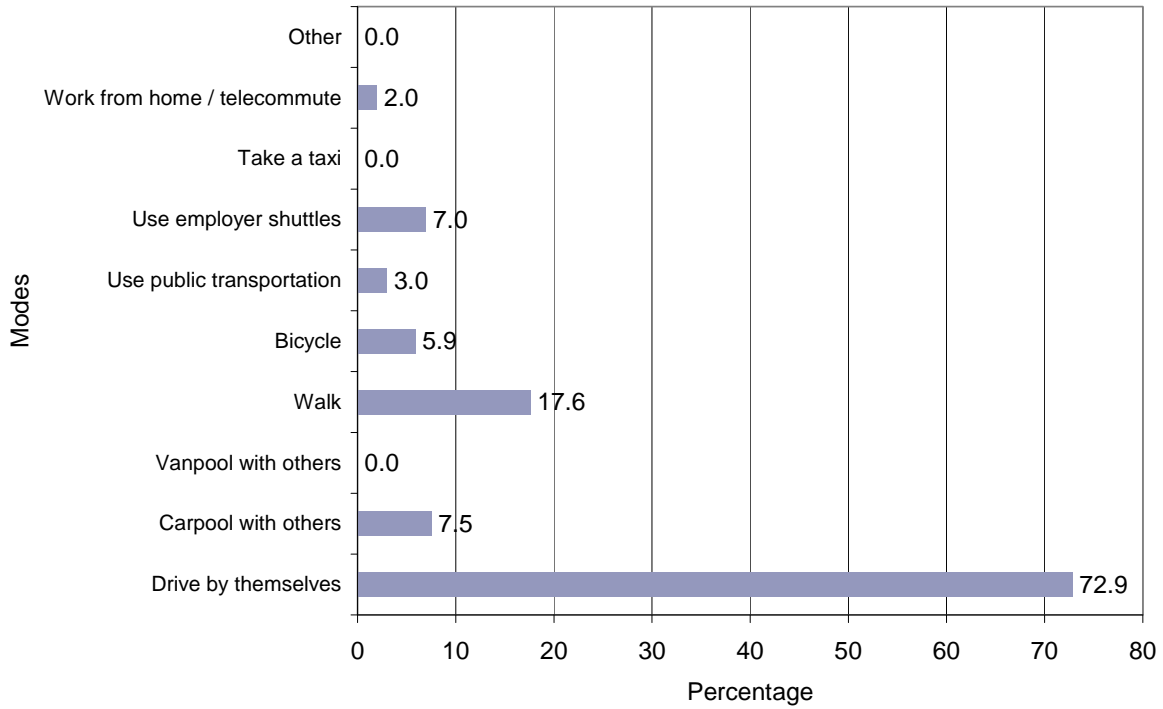
**Q-8: How likely are you to consider implementing any of these strategies?**

**SW Montana Employers' Willingness to Implement Alternate Transportation Strategies**



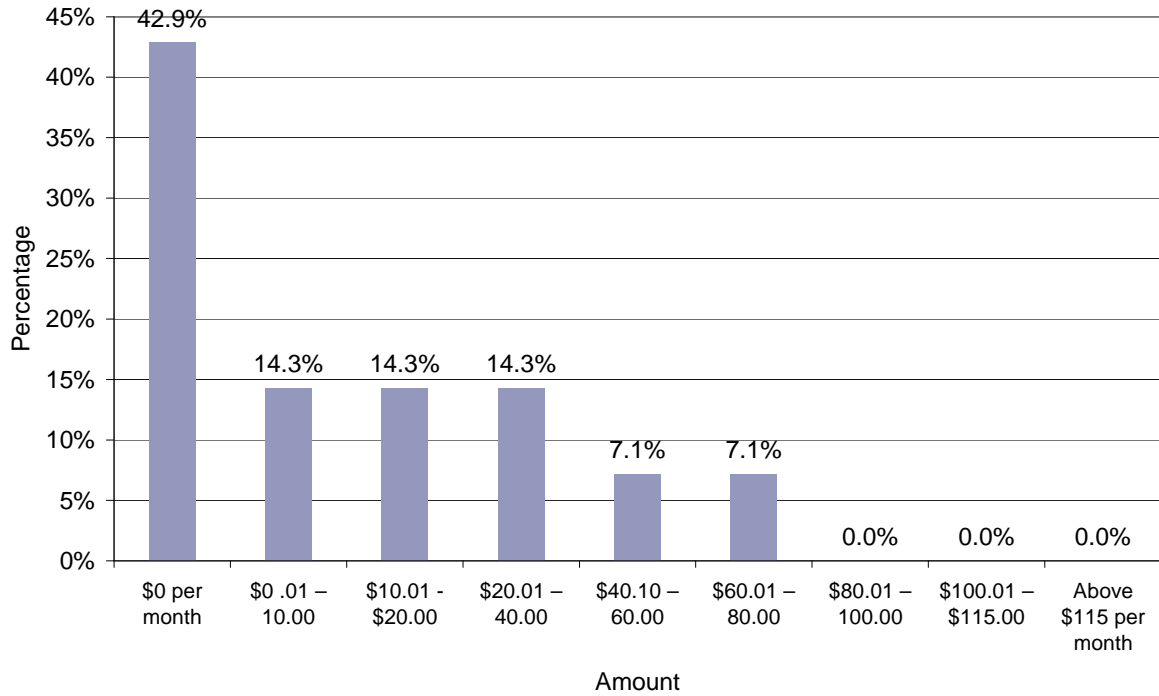
**Q-9: Based on the best knowledge available to you, what percentage of your employees travel by the following modes (must add to 100)? Tip: Use the spreadsheet included in your e-mail invitation to help with the calculations.**

**SW Montana Employers' Estimate of their Employee Travel Modes**



**Q-10: If there was a cost associated with public transit, carpooling, or vanpooling, how much would you be willing to pay per employee? (Federal law lets workers receive up to \$115 a month in employer-paid tax-free transit costs, or take up to \$115 a month in tax-sheltered payroll deductions for transit costs.)**

**SW Montana Employers' Willingness to Cover Transportation Costs**



<b>Other amount or funding (please specify)</b>
\$15,000 a year in Skyline Funds

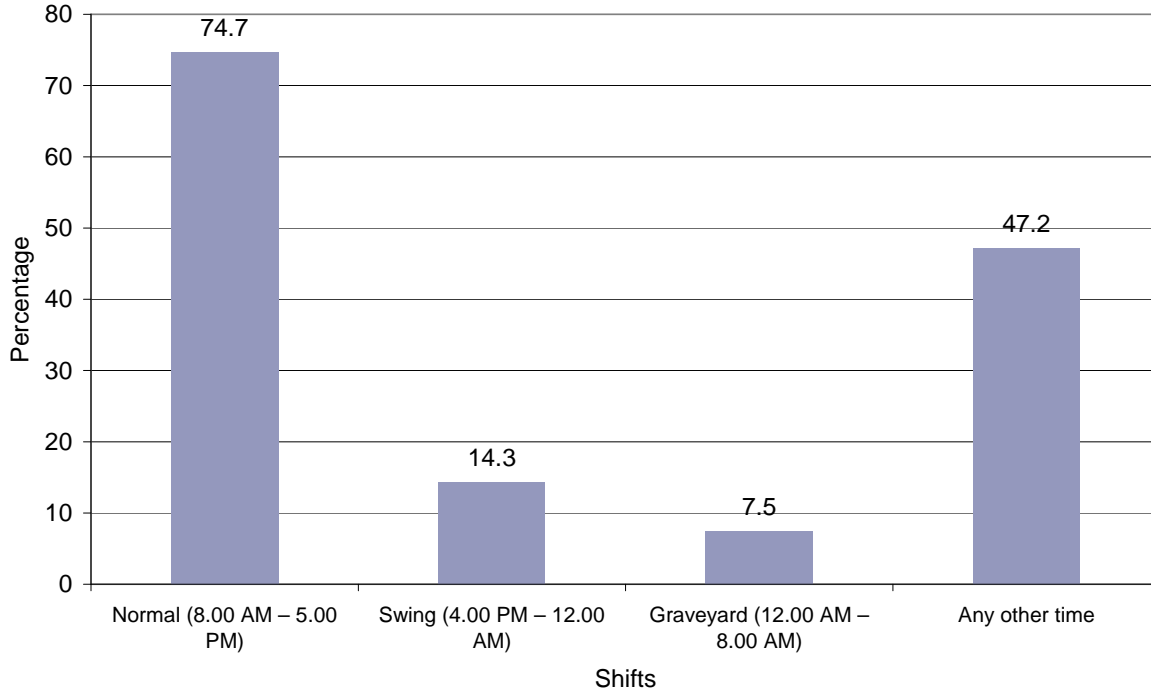
**Q-11: Approximately what percentage of your employees commute from the following zip codes (must add to 100%)? Tip: Use the spreadsheet included in your e-mail invitation to help with calculations.**

Movements between Zip Codes per Long Employer Survey and Livingston TAC

Employee Locations	Employer Locations					
	59716 Big Sky	59715 Bozeman	59717 Bozeman	82190 YNP	59725 Dillon	59030 Gardiner
59714, Belgrade, Gallatin County, MT	4	255	1	0	0	0
59715, Bozeman, Gallatin County, MT	0	317	2	0	0	0
59717, Bozeman, Gallatin County, MT	10	63	0	0	0	0
59718, Bozeman, Gallatin County, MT	0	319	3	0	0	0
59730, Gallatin Gateway, Gallatin County, MT	6	63	0	0	0	0
59741, Manhattan, Gallatin County, MT	0	50	0	0	0	0
59752, Three Forks, Gallatin County, MT	0	50	0	0	0	0
00075, Yellowstone National Park, Park County, MT	0	0	0	120	0	1
59027, Emigrant, Park County, MT	0	13	0	17	0	1
59030, Gardiner, Park County, MT	0	0	0	309	0	4
59047, Livingston, Park County, MT	0	88	0	0	0	0
59729, Ennis, Madison County, MT	0	13	0	0	0	0
59745, Norris, Madison County, MT	0	25	0	0	0	0
59747, Pony, Madison County, MT	0	13	0	0	0	0
59724, Dell, Beaverhead County, MT	0	0	0	0	1	0
59725, Dillon, Beaverhead County, MT	0	0	0	0	87	0
All Locations, Silver Bow County, MT	0	0	0	0	1	0
82190, Yellowstone National Park, WY	0	0	0	9	0	0
Other Locations, MT	0	0	0	0	1	0
Outside of Montana, Idaho, and Wyoming	0	0	0	2	0	0
<b>Totals</b>	<b>20</b>	<b>1266</b>	<b>6</b>	<b>456</b>	<b>90</b>	<b>6</b>

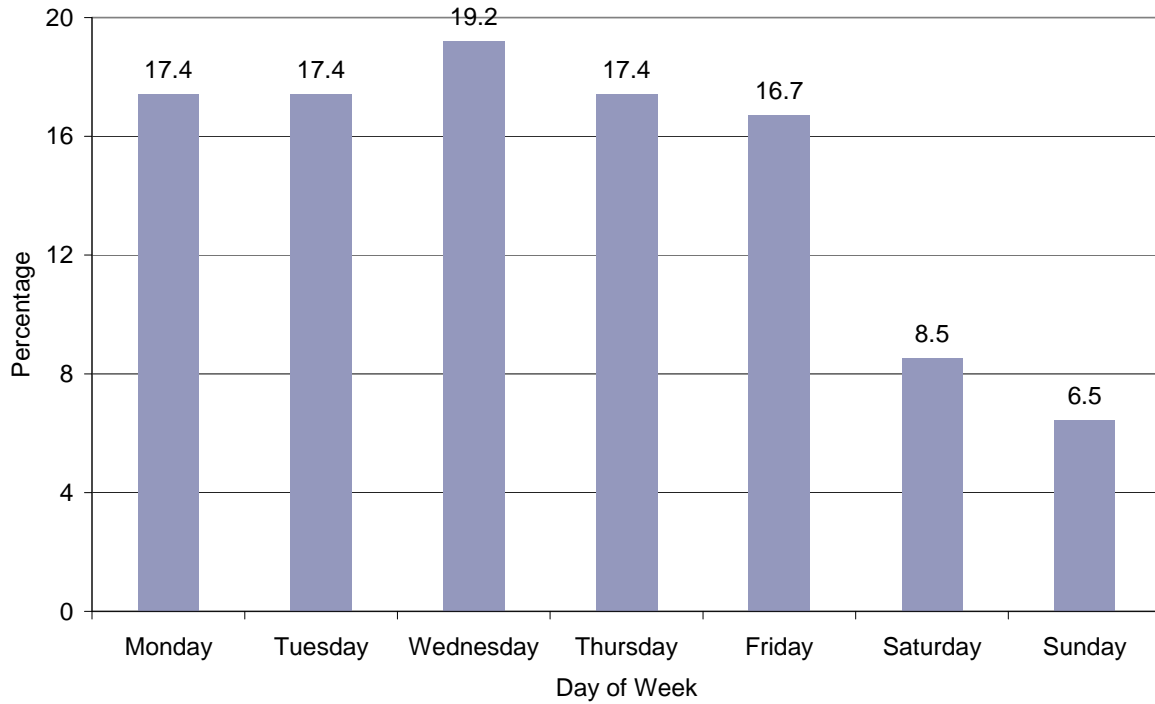
**Q-12: What percentage of your employees works the following schedules (must add to 100%)?  
Tip: Use the spreadsheet included in your e-mail invitation to help with calculations.**

**SW Montana Employers' Estimate of their Employee Shift Distribution**



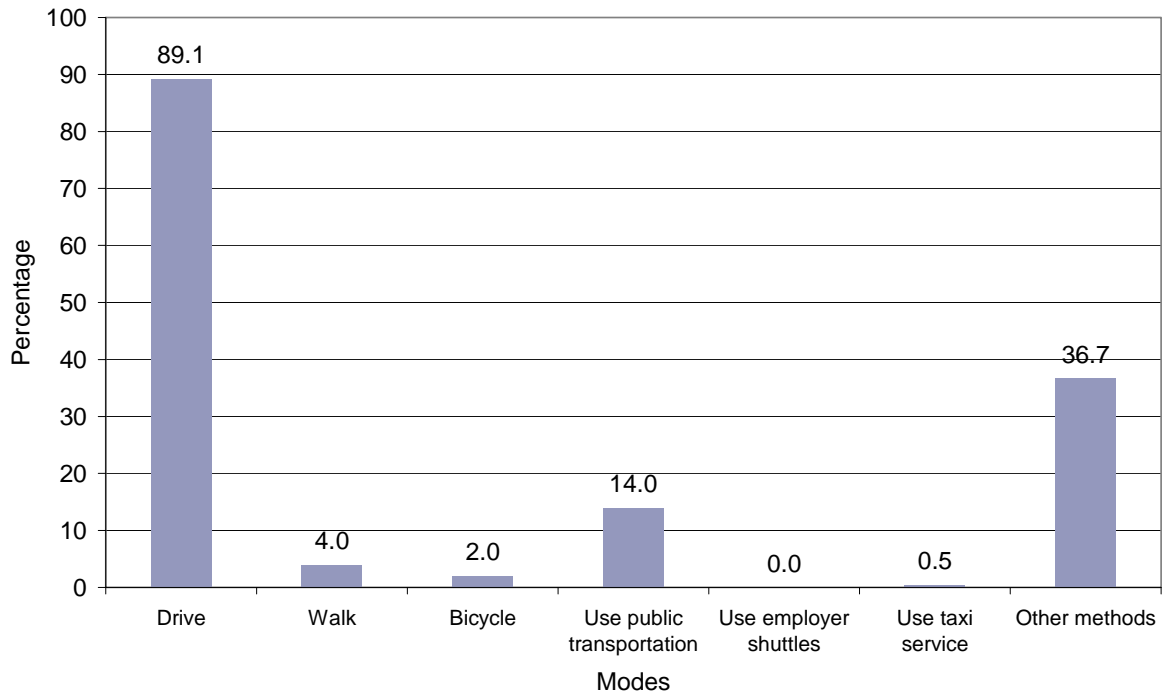
**Q-13: How are your employee shifts distributed (by percentage) by day of week (must add to 100%)? Tip: Use the spreadsheet included in your e-mail invitation to help with calculations.**

SW Montana Employers' Estimate of their Employee Distribution by Day of Week



**Q-16: Approximately what percentage of your customers accesses your business by the following modes (must add to 100%)? Tip: Use the spreadsheet included in your e-mail invitation to help with calculations.**

**SW Montana Employers' Estimate of Customer Transportation Modes**



**Q-19: Do you have any other questions or comments?**

Response Text
We have 3 offices in Beaverhead County (Dillon, Wise River, Wisdom), 2 in Madison County (Sheridan and Ennis), one in Jefferson Co., one in Silver Bow, one in Granite and one in Powell county.
We answered this survey only for our Dillon office. You didn't give enough room for the other offices.
No.
Thank you!