

# Central Montana

## DEFENSE COALITION

---

### Great Falls Development Alliance

## Investment Prospectus

February 2026

### 1) Importance of Existing Missions

#### Malmstrom Air Force Base (MAFB) — Major Economic Engine

##### Direct Economic Contributions

- **Massive economic footprint:** In recent fiscal reporting (FY 2024), Malmstrom AFB's *direct and indirect economic impact* on the Great Falls region was about **\$435.8 million annually**. This includes base operations, payroll, and ripple effects in the local economy.
- **Local payroll:** The base supported a **direct payroll of roughly \$340 million**, including military personnel, government civilians, and contractors.
  - Around **3,268 active-duty military members and 532 government service employees** are assigned to the base.
  - An additional 111 non-appropriated fund civilians and other contractors also work on-base.
- **Job creation:** Beyond direct employment, the base supports roughly **1,200+ indirect jobs** in the local economy through spending on goods, services, and household consumption.

##### Community & Economic Spillovers

- **Housing & families:** Thousands of family members living on or near the base contribute to the housing market and local consumer spending.
- **Veterans & workforce:** There are **thousands of veterans in the region**, many contributing to the workforce or local businesses.

## Broader Statewide Impact

- Some state reports cite Malmstrom's contribution to Montana's economy at **over \$425 million annually**, including utility spending, road servicing contracts, and defense expenditures.

## Long-Term Projects & Growth

- **Sentinel ICBM modernization:** A multi-billion-dollar Department of Defense program is underway to modernize Minuteman missiles, bringing substantial construction and defense contracting work to the region over the next decade.

## Montana Air National Guard (MANG) — Local Employment & Economic Supports

### Units & Presence

- The MANG includes units such as the **219th RED HORSE Squadron** and elements of the **120th Airlift Wing** based at Great Falls International Airport.

### Economic Contributions

- While specific local figures for Great Falls aren't always reported separately from Malmstrom, broader state analyses estimate:
  - The **Montana National Guard** contributes **more than \$185 million in economic impact statewide**, which includes payroll, operations, and construction projects.

### Workforce & Local Spending

- Guard members (both full time and traditional part-time) contribute to the local economy via household spending, housing, and services.
- Guard units also support **local jobs in logistics, maintenance, and operations**, often working in partnership with civilian contractors and local suppliers.

## Why This Matters for Great Falls

- **Economic stability:** The base and Guard units provide consistent employment and consumer spending that anchor businesses in retail, housing, healthcare, and services.
- **Attraction for industry:** A stable military workforce makes the area attractive for back-office operations and technology firms that value skilled labor pools.
- **Multiplier effects:** Spending by base personnel and their families circulates through the local economy, supporting small businesses and tax revenues.

## 2) Sentinel ICBM Mission: What Business Leaders Need to Know

The **Sentinel ICBM program**, which replaces the Minuteman III missile system, is the **single most consequential long-term economic and strategic issue** facing Great Falls. While the mission itself is expected to remain at Malmstrom Air Force Base, **execution risk, cost growth,**

**and schedule uncertainty** create short- and medium-term ambiguity that business leaders should factor into planning.

The central issue is **not whether Malmstrom remains**, but **how smoothly and quickly Sentinel is delivered**.

## Why Sentinel Matters to the Business Community

### 1. Malmstrom Is an Economic Anchor

Malmstrom AFB is:

- One of **three U.S. ICBM wings**
- Responsible for roughly **one-third of the nation's land-based nuclear deterrent**
- A stabilizing force for:
  - Employment
  - Housing demand
  - Healthcare utilization
  - Retail and service sectors
  - Construction and professional services

The Sentinel program is designed to **lock in Malmstrom's relevance for 40+ years**.

## What Is Changing—and Why That Creates Uncertainty

### 1. Cost Growth Has Triggered Federal Scrutiny

- Sentinel's cost growth triggered a **Nunn-McCurdy critical breach**, forcing the Department of Defense to formally re-justify the program.
- The Air Force has paused and restructured parts of the program, including **major redesigns of missile silos and infrastructure**.

#### ***Business implication:***

Federal commitment remains strong, but **timelines are moving targets**, complicating workforce and capital planning.

### 2. Construction Will Be Bigger—and Later—Than Originally Expected

- The Air Force originally planned to reuse Minuteman III infrastructure.
- It now plans to **build entirely new silos, command facilities, and support systems** across Montana.

#### ***Business implication:***

- Larger long-term opportunity for construction, engineering, logistics, and professional services
- Short-term delays before full economic activity ramps up

### 3. Transition Risk Creates a “Gray Zone”

- Minuteman III systems are aging and costly to maintain.
- Sentinel delays mean the Air Force must **extend legacy systems longer than planned**.

### ***Business implication:***

This creates a **transition period** where:

- Employment levels are stable but not expanding rapidly
- Large-scale spending is coming—but not evenly or predictably

### **What Is *Not* in Question**

Business leaders should be clear on what **is not realistically at risk**:

- Elimination of the ICBM mission at Malmstrom
- Base closure
- Withdrawal of federal presence from Great Falls

There is **bipartisan national consensus** that the land-based nuclear deterrent must be modernized. The debate is about **execution, cost, and timing—not location or mission necessity**.

### **Why the USAF Is Under Heavy Pressure to Succeed**

The Sentinel program is under intense pressure because:

- It underpins **national strategic deterrence**
- Failure would force even more costly alternatives
- Delays ripple into **local economies**, not just military readiness

For Great Falls, Sentinel success equals:

- Long-term economic certainty
- Stable population and workforce
- Infrastructure investment over decades

### **What Business Leaders Should Do Now**

#### **Plan for Phased Growth, Not a Single Boom**

Sentinel investment will come in **waves**, not all at once. Businesses should:

- Avoid overextending based on early timelines
- Build flexibility into hiring and capital plans

#### **Invest in Workforce Readiness**

Key future needs include:

- Construction trades
- Engineering and technical services
- Security, logistics, and maintenance support
- Professional services (legal, accounting, real estate, healthcare)

#### **Advocate for Execution, Not Expansion**

Local leaders are most effective when they:

- Support disciplined, on-time execution

- Emphasize workforce housing, infrastructure, and permitting readiness
- Align community planning with federal timelines

## Bottom Line for Business Leaders

**Sentinel is not a question mark—it is a generational investment.**

The uncertainty is **how fast and how smoothly it arrives**, not whether it arrives.

Great Falls' competitive advantage is:

- A mission that cannot be outsourced
- A workforce accustomed to federal partnership
- A region already aligned with national defense priorities

Businesses that plan for **measured growth, adaptability, and long-term positioning** will be best placed to benefit as Sentinel moves from planning to full execution.

## 3) Central Montana Defense Coalition

### Purpose

The Central Montana Defense Coalition exists to ensure the long-term success of existing and future national defense missions in the region, including Sentinel, by providing a **coordinated, business-led advocacy voice** that supports disciplined execution, schedule certainty, and sustained federal investment in Great Falls and North Central Montana.

This effort is **non-partisan, pro-mission, and pro-execution**. Its sole purpose is to protect and advance the region's most significant long-term economic and strategic asset.

### Why This Matters to Business Leaders

Sentinel is a **generational federal investment** that will anchor the Great Falls economy for decades. While national commitment to the mission is strong, **timelines, sequencing, and execution details remain fluid** due to cost growth, redesigns, and oversight scrutiny.

Business-led advocacy helps ensure that:

- Malmstrom remains prioritized during program resets
- Montana realities are understood by federal decision-makers
- Execution risk is reduced for the local economy
- Long-term workforce and capital investments are protected

Advocacy is not political spending. It is **economic risk management**.

### Objectives of the Central Montana Defense Coalition

Coalition resources will be used to:

1. **Maintain a consistent federal presence** in Washington, D.C. and with USAF stakeholders
2. **Deliver data-driven economic impact messaging** tied to execution readiness
3. **Coordinate business voices** in letters, testimony, and briefings
4. **Support delegation engagement** with credible, up-to-date local intelligence
5. **Reinforce Great Falls' reputation** as a capable, ready, and reliable mission partner

## Why a Coalition

No single business can effectively carry this effort alone. Federal programs of this scale respond to:

- Broad-based community alignment
- Consistent, disciplined messaging
- Demonstrated private-sector commitment

A coalition:

- Multiplies impact
- Ensures message discipline
- Reduces duplication and inefficiency
- Strengthens credibility

## Why a Change from Montana Defense Alliance

With so much to do and so much at stake for Great Falls and North Central Montana, the focus right now needs to be on MAFB and MANG, working in a stronger partnership with state and Congressional leaders.

## How Will the Coalition Complement Other Efforts

The Coalition will work in concert with GFDA's overall regional economic development efforts, the important work of the Great Falls Area Chamber of Commerce's Military Affairs Committee, MAFB's Honorary Commanders, and the critical coordination of Cascade County, the City of Great Falls, the Great Falls international Airport, missile counties, State of Montana, Montana Congressional delegation and partners across the country. We will accomplish our mission as a unified team.

## Funding Structure -- Recommended Annual Investment Levels

The Coalition will be funded by key stakeholders and businesses and institutions in Great Falls and North Central Montana. Coalition Investors will be recognized on a separate Investor Honor Roll from GFDA's regular Investor Honor Roll. You do not need to be a GFDA Investor to be part of the Defense Coalition.

<b>Organization Size</b>	<b>Suggested Annual Pledge</b>
Small Business / Professional Firm	\$500 – \$1,000
Mid-Sized Employer	\$1,000 – \$2,500
Large Employer / Institution	\$5,000 – \$10,000+

*Contributions are scalable and confidential unless the contributor opts for public recognition.*

## **Governance & Accountability**

- Funds will be administered by a trusted regional economic development organization, the Great Falls Development Alliance
- Activities will be aligned with federal ethics and lobbying requirements
- Coalition Investors will receive:
  - Opportunities for input in the Coalition's work plan
  - Monthly advocacy activity reports
  - Monthly financial accountings
  - Annual impact summary
  - Opportunities for engagement when appropriate

This is a **focused, execution-oriented effort**, not a general operating fund.

## **The Business Case**

A modest annual investment helps:

- Protect billions in federal spending
- Stabilize workforce planning
- Support housing, healthcare, and infrastructure demand
- Reduce uncertainty for long-term capital decisions

The cost of inaction is **delay, drift, and lost influence**.