



FY23 DISTRICT QUESTIONS

Sponsor: Arts Council of Big Sky

Sponsor Questions:

1. **Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:**
 - a. June 6: Brian Hurlbut, brian@bigskyarts.org
 - b. June 9: Brian Hurlbut, brian@bigskyarts.org
2. **Your unrestricted reserves mention a future art center, what information can you share about this upcoming project?**

Our long-term organizational vision includes a dedicated arts center, similar to what exists in many other mountain resort communities. We are only in the visioning process, and there are no specific plans for this project as of yet, but we have had an anonymous donation to establish a fund available for planning and design costs and to indicate our commitment to the future project.
3. **Does your organization seek funding from sources outside of the BSRAD boundary?**

Yes. Many of our constituents live outside the BSRAD boundary. We receive funding from several granting organizations (state, regional, federal) outside of the boundary as well, and some of our corporate sponsors are also located outside of the boundary.
4. **How has the transition to your new location in BASE been?**

We are enjoying our new space in the BASE center. Our administrative office is slightly larger than our previous one and has a better working environment. We are featuring local artwork in the 'gallery' in the Arts and Culture wing. Our Spring classes have been going very well: As of May 3, we have offered 37 classes; served 89 unique participants; offered reduced class fees to 22 individuals through our pioneering Contribute-What-You-Can model; and there are 27 people on class waitlists. The energy and vibrancy of being in BASE has been the best change—it is an engaging, fun place to work! There are a still few challenges with our move, however: office space is maxed out already; limited access to building conference room; added expense of classroom lease; working out some of the kinks of being in a new building (i.e. security system, technology, expense of outfitting classroom). Finally, having limited access to concrete ice rink pad for summer concerts (something that changed from original BSCO plan) is a logistical challenge that we are having to adapt to.

5. **How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?**

For FY21-22, the organization has significantly invested in our staff by increasing the annual salaries of our Directors: Executive Director by 27%, Development Director by 23%, Education and Public Art Director by 27%. Event Coordinator increased by 5%. We also increased our monthly health insurance stipend (available to full-time employees) by 14%. We successfully hired a full-time Lead Instructor and Studio Manager at a competitive salary, and fortunately this person already had housing in Big Sky. We also hired a part-time Development Associate who lives in Ennis, and a part-time Studio Assistant who was already living in Big Sky. Including our new staff additions and increased salaries, our overall employment expenses have increased by 61% for FY21-22.

6. **Do current art and entertainment facilities address Big Sky's arts and culture needs?**

Obviously I can't speak for other organizations, only to what the Arts Council needs. We are thrilled to have our own, dedicated space to offer classes and workshops—something we have never had in 35 years of existence. So far, this space is proving adequate, although the demand for pottery classes seems enough to warrant its own space, not a shared space. The BASE multipurpose rooms also could be used creatively for classes and performances, but our access to that space is also limited as we have to work around BSCO's schedule and they are using them for their own programming. This summer will be one of evaluation for the Music in the Mountains concerts. The current stage/park will need some updates in the near future, including a permanent 'green room,' as well as improved storage and restroom options. We are unable to fully use the concrete ice rink pad for Music in the Mountains infrastructure like vendors and porta-potties, which reduces the footprint of the park for our purposes. Finally, we still lack indoor space to offer large programs and events. We certainly collaborate with WMPAC and occasionally offer programming there, but it is primarily used for school, WMPAC and other community programs. Overall, we view the current facilities based on our needs as adequate but with the growth of Big Sky we can envision a future where a dedicated arts and culture center exists.

7. **On the LOI you listed \$250,000 as your "FY24 Predicted Request" and \$250,000 as your "FY25 Predicted Request". When cross referenced with project data the total projected amounts come to \$260,000 in FY24 and \$245,000 in FY25.**

a. **Please explain the discrepancy in predicted requests for both FY24 & FY25.**

In between the LOI and the full application deadline we increased funding for anticipated future Music in the Mountains requests based on data that we were getting that indicated several costs would be going up.

b. **Please clarify the organizations predicted requests for both FY24 & FY25.**

As you stated above, \$260,000 and \$245,000 would be more accurate numbers.

8. **Are there any cost savings or additions to your operations now that you are located at the new BASE facility?**

Unfortunately there is limited cost savings now that we are in BASE. In fact, being in BASE is costing us more money. We are leasing the art classroom in addition to what we pay for our administrative offices. We pay a fee to use the conference room and multipurpose rooms for meetings and events. The upside is we are getting revenue from the arts classes, but have limited data at this point on the financial sustainability of the programs. There have been several additions since moving into BASE: we hired a full-time studio manager/lead instructor; a part-

time studio assistant; two part-time art instructors; two independent contractor art instructors; three specialty art instructors (for our two-day adult workshops); and then we have two volunteer art instructors. In the short time we have been in BASE we have significantly changed the arts landscape in Big Sky by not only offering more programs to the community but providing jobs for artists as well as space to create.

9. **Can you explain the budgeted 9% increase in BSRAD funding and 38% decrease in private donations as outlined in your sponsor efficiency worksheet?**

The 9% increase in BSRAD funding is based on the increased cost of the Music in the Mountains program (the only ACBS program funded by Resort Tax). The program expenses continue to increase. For 2022 our sound/light expense will increase by \$25,000. Security will increase by \$2,500. As of 2021, we now have to have a special event insurance policy just for MITM which added \$7,500 to our insurance budget. And it will increase again for 2022. Finally, every year it's possible that Big Sky Resort will not be able to donate hotel rooms for our musicians. If this happens it could \$25,000 to the program's expense. The 38% decrease in private donations is entirely related to the fact that in FY21 we were raising money for two significant public art installations (*Gibbous* and *Lightning*) that were completed before FY22. The current FY22 number is more in line with more typical years when we aren't raising money for large capital public art projects.

10. **Can you explain in more detail the 60% increase in administration expenses year over year as outlined in your sponsor efficiency worksheet?**

This is related to the increase in payroll. As mentioned above our overall salary expense went up by 61% from FY21 to FY22. Although of this expense is directly related to programming, it is categorized as administrative on this worksheet. There are also some increased administrative expenses related to our move into BASE (new computers, more office supplies, equipment, etc.).

Project Name: 2023 Music in the Mountains Programming

Project Questions:

1. **How do you decide when the crowd is "too big" for a concert and what is max capacity?**

Looking back to past years, there have only been a few concerts where we felt that crowd was "too big" for the park area. These are typically associated with larger names (Lukas Nelson, Turnpike Troubadours, etc.) that have a big following. We estimate that the park has a max capacity of roughly 5,000 people. We continually monitor the crowd size each year. Safety is a top priority.

a. **What measures are taken for crowd control, traffic control, and safety?**

For 2021 we hired a different, more experienced security firm to work the concerts (TACTIC out of Bozeman). Their primary task is to ensure the safety of the artists on stage and the crowd that gathers close to the front of the stage. They also protect the backstage area from unwanted intruders, as well as safeguard the band and sound company's equipment. In addition, they walk around the crowd throughout the night. We bring in additional security officers for larger shows (July 4, PBR, etc.). For traffic control we apply for a road closure permit through the county to close Aspen Leaf. We

work with the fire and sheriff's department and inform them of our plans. Since the park is public and does not have a fenced perimeter or dedicated entrances and exits, it's impossible to truly monitor who comes and goes to the events. We created the Event Coordinator position in 2021 in large part to better address the growing popularity of Music in the Mountains and to ensure the safety and smooth execution of these events each week.

- 2. Our community visitation has changed a lot since you started these events, how are you adjusting to the large crowds and the growing # of tourism related events throughout the summer and/or frequency of concerts (Potentially targeting a few Thursday nights rather than every Thursday night)?**

While the visitation has changed over the years, our Thursday night concerts still cater to locals and visitors, much like they did when we started the series in 2008. While there continues to be more tourism related events throughout the summer, the MITM concerts are the only large event held weekly on Thursday nights—most other and/or new events are on weekends. We view the concerts as an amenity for those who visit and live here. If we had fewer concerts, some visitors would not be able to attend one of our shows, which is often one of the highlights of any summer visit to Big Sky. A few years ago, we responded to the community by starting the concerts earlier in the season to promote and augment June activity. We now have two concerts in June and finish the season in September, which allows most summer visitors to experience at least one concert. We also partner with other organizations throughout the summer to make the concerts an even bigger draw (Soul Shine and Big Sky PBR are two examples). We have not received any input that would indicate we should do less – in fact, we continue to receive positive response to a lengthened season.

- 3. When was the last time you gathered data from the community and businesses on what their desire for this well-loved community program to look like, and used that data to design your program frequency, scale, talent, etc.?**

Most of this data is collected anecdotally, and in response, we have used this informal data to make changes to the series over the years. For example, when the program began, we did not start the concerts until July 4 and we ended them in late August. We have since extended on either side of the season at the request of our business and community partners to boost economic activity. Now that Len Hill Park is completed and we can use the entire redesigned park for the first time, evaluating the MITM program is a top priority for this summer, which includes a survey that will be distributed to the audience, community members and local businesses over the course of the summer.

- 4. At one time there was a discussion related to not allowing alcohol into the concert site and only having it for purchase by vendors within Len Hill Park to alleviate some concerns with excessive drinking. Please explain the current alcohol policy.**

The current policy is similar to what exists throughout all of Big Sky: we have no way to enforce the bringing in of alcohol to our event because of the open container policy. Because our event is not fenced off, there is no dedicated entry and exit, so there is no way to control what/who comes in. That being said, this subject will be part of the evaluation process mentioned above.

- 5. In your process for securing food vendors how do you ensure they are registered with the District to comply with the Ordinance?**

Our Event Coordinator handles the vendor registration. Once a vendor is accepted, they sign a

Vendor Confirmation Form that has the following language: *“All vendors must pay a 4% Resort Tax on all income earned at the concerts. Please contact the Resort Tax office at 995-3234 for proper forms to pay the tax. Failure to do this will result in being barred from vending in Big Sky. You are responsible for this. No exceptions!”* Over the course of the summer we try to check with the Resort Tax office to see who has registered. We will supply the contact list of accepted vendors to the Resort Tax office if requested to help with compliance efforts.



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky Community Food Bank

Sponsor Questions:

- 1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:**

- a. June 6:** Sarah Gaither Bivins & Jill Holder sarah@bigskyfoodbank.org and jholder@thehrdc.org
- b. June 9:** Same as above

- 2. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?**

State and local cost of living increases are impacting both our customers and organization in profound ways. Most significantly, our customers are being negatively impacted by rising rent and housing costs. It is not uncommon for households to be spending 50% of their income on housing. Our Big Sky businesses are struggling to find employees who can live within a 100 mile radius; transportation costs have increased and are a growing percentage of household budgets. One study has shown that households are currently spending 8 1/2% more over last year, an average of \$327/month because of inflation right now.

For our customers, we are offering gas cards, produce vouchers, bus passes, computer access, and laundry - anything we can think of to add cash back into household budgets. Additionally, we are trying to get a bus stop returned to our location near the food bank - we were without one all winter, due to driver shortages. We often share job opportunities with customers, as well as refer customers to emergency housing assistance programs through our HRDC offices and properties.

Within HRDC, the board of directors are updating our salary structure annually so that we can maintain our own workforce with reasonable wages and benefits.

- 3. How has the recent Food Bank renovation and expansion impacted your operation?**

Because of our recent expansion in Fall 21, in addition to the added hours of operation made permanent in FY 21 and return to "in-person" shopping in May of 2021, we have seen a steady

increase in the number of customers, the frequency of customers, and the length of time customer spend at the food bank.

To date, we have seen a 36% increase in services from last year. If our numbers hold through the end of FY 22, we'll see a total increase of 55% from FY 21. This is a 32% increase over our 8 year average. These numbers reflect the emergency food boxes that are provided to households.

Due to the renovations, we are now able to provide private meeting options for customers to access help so the overall experience for our customers is more empowering and secure. Customers spend more time shopping, looking through the coat room or in the computer lab now that our spaces are less crowded and more efficiently organized. Because we have separate donor and customer spaces, we can now turn around donations quicker. Now, both the donor and customer experience in general is positive and easy. Now that we have our dedicated kitchen space, repacking of foods is more efficient and also saves money on food costs.

4. **Can you provide an update for Big Sky regarding the HRDC capital campaign and facility expansion in Bozeman?**

As of May 2022, HRDC has broken ground on the new food resource center and services hub at Griffin Place. We have raised close to 11 million dollars of our 15 million dollar goal. The new campus will be a place for customers to access food (both hot meals and packaged food bank groceries) as well as all of the other services that HRDC provides, all at one place. Currently, HRDC has 13 different properties which house our various services, making it difficult for customers without reliable transportation to get help efficiently. At the new campus, a customer will be able to have a hot meal, access housing support services, case management, and food bank within the same building. The new campus will allow us greater storage capacity (dry, refrigerator and freezer) as well as increased ability to purchase large quantity items (semi loads). With a new commercial kitchen, plans for creating single serving frozen and prepared meals will be available as well as an ability to process more restaurant rescued items. Most impactful is providing services to the work force who struggle to live in Big Sky whether we see them in Big Sky, Bozeman or Three Forks.

- a. **How will this facility impact the Big Sky Community Food Bank?** We anticipate that we at the Big Sky Food Bank will rely heavily on the new facilities and services at Griffin Place. It will provide a steady and sustainable flow of food and nutritional resources that we can pull from whenever we need - pre-packed meals, produce boxes, and specialty items that we can't always get in Big Sky. Perhaps even more importantly, I also anticipate that the Big Sky workforce will greatly benefit from Griffin Place. As we know, Big Sky relies on a commuter workforce from all over Gallatin Valley and our reliance on workers residing outside Big Sky is growing. Many people utilize food/nutrition and other supportive services nearer their homes in Bozeman, while holding jobs in Big Sky. Griffin Place will provide enhanced services to the Big Sky workforce residing throughout Gallatin Valley. This is a great opportunity for us to make an impact on food insecurity throughout the valley.

5. **Your request this FY is 31% greater than what you had projected last year, what has changed that is requiring this significant increase?**

Last year, we had projected a \$49,000 request for FY 23. However, we have amended our FY 23 request from the initial application due to some unexpected additional funding - we originally applied for \$64,000 (1/3 of our budgeted expenses) but are now requesting \$51,750 (1/4 of our budgeted expenses). This leaves us with a FY 23 request that is actually only a **6% increase** from last year's projection, even though our operating budget has grown for FY 23 by 37%.

In FY 22, when we were projecting for FY 23, we had projected an operating budget growth of 15%, but due to two main factors outlined below, are now operating with projected budget growth for FY 23 of 37%.

Increase in rental space:

In FY 22 when we were projecting for FY 23, we did not anticipate the opportunity to expand our space by another 750 sq/ft. We did not have the increase in space budgeted. This expanded space increased our rent by 46%.

Increase in FTE/wages:

In FY 22, when we were projecting for FY 23, we had anticipated the need for 1.37FTE. But due to our larger space, expanded services, and customer utilization of the Food Bank/Resource center which has increased by 36% in FY 22, we now feel the need for 1.75FTE. We have 1 full time staff, and two part time staff who total 30 hours per week. To keep up with the cost of living we raised wages by about 16% over FY 22.

a. **Your FY24 and FY25 projections are flat, please explain.**

We do not plan to expand in space or staff and we are also hopeful that we can generate funds in other ways such as fundraising and secure multi year grants.

6. **What is the biggest post pandemic impact on community health & safety?**

The biggest post-pandemic impact on our Big Sky community is the instability that we've been left with. People feel unstable in their homes, as landlords continue to raise rent and/or sell units on short notice. Or they feel unstable in their homes because they recognize that their retirement plans are unrealistic, due to medical or work factors. People feel unstable in their jobs, as wages fail to keep pace with the cost of living in Gallatin Valley. People feel unstable within their own families, as social and cultural divisions increase and become more acute. People feel completely unstable in the community of Big Sky, as we see growth and change all around without much say in how development gets done or knowing who is in charge. People may be feeling mentally unstable as well, as they contend with stressors and anxiety that they may have never had to deal with before. Our equilibrium is off and people are searching for new ways to maintain stability in their lives.

7. **Can you explain the budgeted 42% increase in BSRAD funding and 6% decrease in private donations as outlined in your Sponsor Efficiency Worksheet?**

** Please note that the Sponsor Efficiency Worksheet is comparing the actual BSRAD reimbursement for **FY 21** (column D) to the budgeted request for **FY 22** (column E).

**Addressing 42% increase in BSRAD funding:

For FY 21 we were awarded \$44,650 but requested reimbursement for only \$33,812. Had we been reimbursed for the entirety of our award, the increase between FY 21 actual and FY 22 budget would have been 8%. Our total actual requested BSRAD funding for FY 21 was far lower than our award due to the fact that our financial software was about 6 weeks behind expenses hitting the books. As such, we were unable to make our final Q4 reimbursement request before the contract deadline.

**Addressing -6% in private donations:

Between FY 21 and FY 22 we actually budgeted for a 12% increase in individual donations. The decrease of 6% between the actual dollars raised through donations in FY 21 and the budgeted FY 22 donations total, just means that we had not anticipated the outpouring of donations we received from community members during FY 21. We had budgeted \$72,200 for FY 21 and exceeded that amount by \$13,000 to equal \$85,459 as our FY 21 actual.

As a reference, our actual BSRAD funding for **FY 22** should equal our FY 22 award of \$48,000. Our request for **FY 23** is \$51,750 - an increase of 6% from FY 22.

8. Please provide the last 5 years of user numbers and any other relevant data.

FY 18 = 1609 emergency food boxes served to 798 customers in 621 households, including 352 clients in 340 households who were new to Big Sky. We served Thanksgiving for 193 customers in 74 households.

FY 19 = 1504 emergency food boxes served to 669 customers in 504 households, including 311 customers in 272 households who were new to Big Sky. We served Thanksgiving for 116 customers in 50 households.

FY 20 = 1591 emergency food boxes to 800 customers in 495 households, including 228 customers in 156 households who were new to Big Sky. We served thanksgiving for 36 households and did 16 food box deliveries to 12 households in quarantine. (Drive-up only shopping began March 2020, no one was allowed into the food bank. First federal stimulus check went out in April 2020)

FY 21 = 1156 emergency food boxes to 574 customers in 305 households, including 129 customers in 112 households new to Big Sky. We did 52 food box deliveries to 31 households in quarantine. We served Thanksgiving for 55 households. (Drive-up only shopping at BSCFB remained in place until May 4 2021. Federal stimulus checks went out in Dec 20/Jan 21, and March 2021. Child tax credit checks issued July-Dec 2021, and upon tax filing April 2021. Expanded Unemployment benefit checks were issued Dec 2020 thru Sept 2021.) During this period we began to see an increased need in families who were relatively established in Big Sky but had become less financially secure due to Covid. These families need services above and beyond food and nutrition.

FY 22 (to date)= 1581 emergency food boxes have been given to 740 customers in 479 households, including 336 customers in 279 households new to Big Sky. We've done 10 food box deliveries for 7 households and provided Thanksgiving for 65 households. Services outside of food (case management & social service support) now accounts for 6 hours/wk of staff time. Average weekly users for coatroom is 27 people. Average weekly users for computer lab & laundry is 3.

FY 22 (estimated total) = 1875 emergency food boxes.

Customer demographics (FY 18-date) -

Children U18 = 2.2%, 18-23 = 9%, 24-44 = 76%, 45-54 = 7.6%, 55+ = 5.2%

64% male: 36% female

Residing in Gallatin 80% : Madison 20%

68% of our customers are under 100% AMI for Gallatin : (2021 HUD: 1 person = \$49,800/yr, 2 person = \$56,900/yr, 3 person = \$64,000, 4 person = \$71,100)

Veterans: 7.5%

J1 Students : 3.5%

Primarily Spanish speaking household (only collected in FY 21,22) : 24%

Project Name: Emergency Food and Social Services

Project Questions:

1. **The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which Initiative is this project working to achieve?**

We are working toward three initiatives, in equal parts:

- Increase access to, and utilization of, federal, state, and local social service programs
- Create new access points to services for both English and Spanish speakers
- Develop coordinated entry and increase collaboration among all service organizations; increase advocacy

2. **Please explain what the new services (wrap around) you are providing for our community.**

Wrap-around services include any extra funding or support that we can help household access to make their budgets better fit their expenses. These can include federal, state, and local funds and benefit programs including SNAP (food stamps), WIC (Women, Infants & Children supportive funding) TANF (Temporary Assistance for Needy Families) as well as Montana expanded Medicaid, Medicare, Emergency Rental Assistance Program, etc. Nonprofits across Montana and Gallatin Valley also have various supportive programs that households can apply for, depending upon qualification requirements.

Just this week, I've helped families with WIC enrollment (even though none of the Big Sky grocers accept WIC and families have to use Bozeman grocery stores), unemployment insurance benefits (online), legal and immigration aid (referral forms), Summer Camp scholarship applications, Summer camp lunches sign up, healthcare insurance application support, affordable housing applications (Bozeman & Livingston), DPHHS summer child care grants (online), financial aid applications for Bozeman Health, and referrals to counseling in Big Sky. And we compiled links to all of Big Sky's job and employment boards for families looking for work. Last week, we helped people find infant formula, print visa documents, and apply for senior (aged 60+) groceries (formerly commodities). Next week, I'll be helping people on Medicaid update their contact information.

3. Please explain what case management at the food bank looks like.

Customers who are new to the food bank, or who are seeking assistance outside of food resources, are able to go over their household needs and resources with staff. We gather baseline household demographics, income and expense basics, and attempt to connect households with all other available federal, state, and local resources for which they may qualify. This process can include simply providing resource info and qualifications, to actually walking customers through the application process either on paper, over the phone or online. We use a services matching tool developed by HRDC to help match households to resources, we also utilize HRDC's Financial Opportunities Center resources to assist in understanding household needs and resources. We remain available to customers as a point of contact and information throughout the process. As customers return to the food bank for emergency food, we are able to check in on the progress of their assistance.

4. How do your goals for this year compare to last year? Were you able to hit last year's goals?

Last year, our goal was simply to fulfill all requests for food and nutrition assistance - which we accomplished. This year, we've expanded our goals in accordance with our expanded space and services to include staff time spent on application assistance and case management, as well as the number of application assistance opportunities with other resource representatives. We also have outlined goals for direct cash assistance through grocery vouchers, gas cards and bus passes.

Sponsor: Big Sky Community Housing Trust

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: David O'Connor
 - b. June 9: David O'Connor
2. Does your organization seek funding from sources outside of the BSRAD boundary? Yes
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? To attract and retain qualified staff amid an environment of rapidly increasing living costs, BSCHT increased salaries and benefits. Cost of living increases also drastically affect the Big Sky workforce, served by BSCHT. In response, BSCHT's Rent Local program stems the loss of rentable inventory to the short-term vacation rental pool, and the incentives help off-set increasing rental costs. Additionally, Good Deeds addresses the short-term inventory loss with the goal of assisting buyers with down payments and permanently preserving existing inventory as community housing. However, award amounts will likely need to increase to reflect rising real estate costs.
4. How do you calculate cost overrun contingencies on development projects? And are your reserves used in this strategy? For the Riverview project, the LIHTC funding requires BSCHT to carry a contingency equal to 5% of the final contract amount. In real terms, this equates to about \$330,000. Deferred developer fees will absorb any overruns exceeding the required contingency. Our organization's reserves are not targeted for this purpose.
5. Please explain the growth in the Total Operating Budget outlined on the Sponsor Efficiency Worksheet. BSCHT forecasts the Total Operating Budget to expand due to increased salaries and additional staff hired to support the growing project base.
6. In March of 2021 you provided a Workforce Housing Needs Analysis. This document supplemented the 2018 Big Sky Community Housing Action Plan.
 - a. Have either of these documents changed since March of 2021? No, although BSCHT is actively conducting a community-wide housing survey that ends June 15, 2022. This survey targets local businesses and employees to refresh the data in this rapidly changing environment. Additionally, BSCHT continues to explore and learn from the tools used in other resort communities.
 - b. Are the metrics in these documents the "Community" housing goal? Taken from the 2018 Plan, the term "Community Housing" is housing that is intended to be occupied by and affordable to residents of or persons employed in Big Sky. The metrics in these documents do refer to this type of housing.
7. On the LOI you listed \$2,000,000 as your "FY24 Predicted Request" and \$2,500,000 as your "FY25 Predicted Request". When cross referenced with project data the total projected amounts come to \$1,550,000 in FY24 and \$1,850,000 in FY25.

- a. Please explain the discrepancy in predicted requests for both FY24 & FY25 The discrepancy is due to the fact that we predict additional development opportunities will arise by 2024 and 2025, as-yet unknown or not yet solidified, which would require Resort Tax investment for BSCHT participation.
 - b. Please clarify the organizations predicted requests for both FY24 & FY25. The FY24 and FY25 predicted requests depicted in the LOI account for potential development partnership opportunities not yet known. We can predict our programming needs with fair accuracy, but development opportunities tend to crystalize in a closer time-frame, and are often significant investments.
8. Your request is 15% higher than you had projected in last year’s application, what is different this year than what you had projected? Our programs are expanding in reach and the costs associated with the programs are also increasing.
 9. What plans do you have to decrease your reliance on BSRAD? BSCHT looks forward to the support of Elevate Big Sky, who identified housing as a funding priority in its "livability" pillar. Additionally, BSCHT is applying for ARPA funds for administration expenses through the One Valley Community Foundation. Support from the three local community foundations has also increased. BSCHT continues to expand offerings for philanthropy, including facilitation of gifts of stock equities and planned giving.
 10. How do you project future earned income will support BSCHT efforts? Earned income from property management and Community Land Trust Stewardship remains a steady source and helps defray administrative costs.

Project Name: BSCHT Operations

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the 2022 Our Big Sky Update. Which **Initiative** is this project working to achieve? The Initiative supported by this project is “A variety of affordable housing options for all workers”. A dedicated staff of at least three is required to continually identify, fund and execute a myriad of solutions in pursuit of this Initiative. The Operations project supports this staff and its activities.
2. How is this project working to address the need outlined in to 2018 Big Sky Community Housing Action Plan? Operations support is required to maintain a viable organization which handles a variety of initiatives and programs as well as provides general education and knowledge to the community. The organization is entirely focused on implementing the 2018 Big Sky Community Housing Action Plan, and both board and staff continually evaluate our actions against those outlined in the plan.
3. Is your operation and staffing scaling at the same rate as the number of projects you take on? At the moment, projects are outpacing staffing. The staffing level of the BSCHT (2.5 FTE as of application) is materially the same as it was two years ago, when BSCHT first conceived its primary programs. The Rent Local program has expanded to nearly 50 properties since August of 2021. With the addition of a full-time Stewardship Coordinator, BSCHT will expand its team to three full-time employees as of June 1. BSCHT anticipates further additions to staff in the coming one to two years as programs and future development grow.

4. Why the decrease in FY24 in Total Project Funding for this project? It looks like you will decrease both BSRAD ask and your private donations only to increase in FY25. Please explain. Upon consultation with BSRAD staff, in FY22, BSCHT will incorporate a change in how it calculates its administrative costs. We will allocate some staff expenses per-project to reflect actual program costs more accurately and to follow more standard accounting practices. While overall staffing costs will rise in FY24, some of these will correspond with specific project expenses. In FY 25, however, BSCHT anticipates needing an additional full-time employee, which will again raise payroll costs, therefore increasing our anticipated administration request over the previous year.
5. Your Sponsor document indicated you will move from 2.5 to 3.5 staff in the upcoming fiscal year, but this project indicates only a .5 addition to your team. Please explain the discrepancy. BSCHT created a Stewardship Coordinator position effective June 1, 2022, which will bring staffing from 2.5 FTE to 3.0. BSCHT forecasts needing an additional .5 FTE for program support, which will not fall in the operations category.

Project Name: Deed Restriction Incentives

Project Questions:

1. How is this project working to address the need outlined in to 2018 Big Sky Community Housing Action Plan? Deed Restriction Incentives (“Good Deeds” for BSCHT) are a powerful tool against the loss of residential inventory to the short-term rental market, a significant challenge outlined in the 2018 plan. Specifically, the plan identifies #5, “STR Conversion to Long Term Rentals” and #6 “STR Restrictions” as primary recommended strategies.
2. What is the average market rate adjustment on a deed restricted home? While this new program does not yet have any Big Sky comps, BSCHT uses data from several Colorado resort towns which have implemented similar programs. This data estimates the market value of a deed restriction is between 10-15% of the retail value of the property. The implementation team developed an evaluation matrix which assigns points for various factors to determine the award it will give a property for a deed restriction. Whether a property’s value would actually decrease by that amount (or any) in current market conditions remains to be seen, as no actual resales of such deed restricted properties have occurred in Big Sky.
3. Other than Resort Tax, what is your forecasted funding for this project in FY24 and FY25? We anticipate receiving 50% of the Good Deeds program funding from Elevate Big Sky in future years.
4. Have you established the incentive structure will be for purchasing deeds? If yes, please explain. If not, what’s your starting point? BSCHT started by prioritizing (via a scoring system) new purchases under \$1M. Recent increases in property values in our targeted neighborhoods suggest a reconsideration of these priorities. BSCHT, through its Good Deeds Committee, is in the process of adjusting in response to rapidly changing market conditions and will finalize a modified structure once total funding for the remainder of 2022 is known.
5. What interest has been expressed so far? So far, interest in Good Deeds falls into two categories: local buyers needing down payment assistance and full-time residents in owner-occupied homes.
 - a. How many homes/owners have shown interest? Four

- b. How many properties do you have lined up ready to pull the trigger if you receive this funding? **Two applications remain active, though no applicant has been specifically approved pending funding.**
- 6. With a project budget of \$1,500,000 and a goal of 15 deed restrictions acquired are you averaging \$100,000 per deed restriction? **Exponentially rising property values will probably necessitate a higher funding level to fewer awardees.**
 - a. Since this is a pilot year is this realistic? **BSCHT generated its initial interest (four applicants) through a single kickoff event with minimal promotion. Once fully funded, and with additional marketing efforts, BSCHT anticipates increased interest in the program. Experience in other resort towns of similar size shows this is a realistic forecast.**
 - b. How many units are you targeting for the permanent deed restriction with the \$750k? **Six to seven, depending on properties involved.**
- 7. Are there additional legal expenses to setting up these deed restrictions that are not included in the budget? **Yes, legal expenses average \$1,000 per deed restriction. These costs will be reflected in the Administration portion of the project.**
- 8. In a Board meeting update you originally mentioned \$500k for this project and now it is \$750k, please explain the change. **Property values in Big Sky continue to rise at a rate that exceeds industry models. Given that this program's awards are structured as a percentage of home value, the cost per deed restriction rises with property values. Feedback to BSCHT from various stakeholders therefore prompted us to increase the project budget.**

Project Name: Rent Local Incentive

Project Questions:

1. Please provide metrics for the project goals listed on your application.
 - a. Increase rental housing supply for local workers **35 new units added**
 - b. Secure long-term leases in place **53 units (new units plus renewals)**
 - c. Retain existing long-term rentals and prevent them from flipping to vacation rentals **18**
2. Please provide the time frame for the milestones provided on your application
 - a. Retain 15 existing rental units in the long-term market **We anticipate retaining an additional 15 properties by the end of FY22**
3. How is this project working to address the need outlined in to 2018 Big Sky Community Housing Action Plan? **This program is Strategy #5 in the 2018 Big Sky Community Housing Action Plan: STR Conversions to Long Term Rentals.**
4. Have you had renewals in the program, if so, how many? **The program is nearing completion of its first full year, so opportunities for renewal are still limited. Seven owners from the pilot have increased their original commitment to Rent Local from one to two years. Additionally, on January 31, 2022, BSCHT funded 15 owners with a history of renting long-term, securing these leases until February 1, 2024.**
5. I see this program having year over year expenses, so if we continue to grow the # of units in the program the funds needed will only increase, however your projected requests stay the same in the coming years, please clarify? **Over time, we anticipate de-emphasizing Rent Local in favor of Good Deeds. Additionally, we anticipate some growth in support from philanthropic funders.**

- a. How long do you plan to keep the Rent Local incentives going? Designed to immediately address Big Sky's housing emergency, Rent Local is a stop-gap program that will run for approximately six years. As the community builds more homes and deed restricts existing inventory for residents, BSCHT hopes to phase out the Rent Local Incentive Program.
 - b. Do you anticipate Rent Local transitioning purely to deed restrictions? If so, when. Ideally, BSCHT transitions to permanently deed restricting properties in Big Sky's more affordable HOAs in the next five years. However, market conditions as well as funding will determine if this is possible.
6. How many units do you currently have in this program? Your application highlighted you want to retain 15 but it's unclear if you have more than 15 or not. BSCHT currently has 53 properties enrolled in RENT LOCAL. This figure includes all pilot program participants, new owners to long-term renting since the completion of the pilot, and owners already renting on the long-term market who commit to doing so for an additional two years.
7. How long can a property be a part of the program? Four years
8. Does the unit have to be a short-term converted to a long-term or can it be an existing long-term rental that just wants to utilize the program? While the program emphasizes properties at risk of conversion to short-term rental, there is a component to accommodate existing long-term renters. BSCHT reserves the majority of its Rent Local funding for creating new long-term inventory. However, it commits approximately 35% of its funding for property owners already on the long-term market, provided these owners commit to leasing for two additional years.
9. If it is an existing long-term rental, does the \$ charged to the tenant get reduced based on the public fund subsidy? Owners in Rent Local may charge 'market-rate' rent, with a cap determined by BSCHT and reevaluated annually. The maximum rental rate allowed for any Rent Local participant is \$1,750 for a one-bedroom unit or \$1,400 per bedroom on multi-bedroom units.
10. What is the average cost per/unit and per/bed? This is a difficult figure to interpret as an average, as award amounts vary widely according to # of bedrooms and duration of lease, To keep a property in RENT LOCAL for two years, for example, the average cost per unit is \$12,669; the average cost per tenant is \$6,662; and the average cost per bedroom is \$7,793.

Project Name: RiverView Apartments on Lone Mountain Trail

Project Questions:

1. What is the expected life span of your deliverable of the 25 new rental housing units? BSCHT will permanently deed restrict these units for the local workforce and projects the rental rate restrictions to last for 46 years.
2. How is this project working to address the need outlined in to 2018 Big Sky Community Housing Action Plan? This program reflects Strategies #8 and #12 in the 2018 Big Sky Community Housing Action Plan: Land acquisition for housing – Evaluation and Purchase and Employer Assisted Housing - Rental Program. Additionally, we are utilizing the Funding Strategy called out in the Plan: Federal/State - Grants/Loans/LIHTC.
Please provide an update on previously unspent BSRAD allocated funds for this project. The \$1.4M allocated for the land purchase and preparation will be fully consumed before the end of FY22 (see below). Site preparation activities will commence in earnest June, 2022, and it is

anticipated that the remaining \$500k allocated to Riverview will be utilized prior to the end of FY22.

3. To date only \$5000 has been spent as a title commitment for the land purchase. On May 12, the Gallatin County Planning & Zoning Committee approved the PUD application for Riverview, as well as the accompanying variance needed to commence the project. This represents the final obstacle to BSCHT closing on the land purchase with the BSRAD allocation of \$1.3M. Closing is now proceeding, and will be complete by June 30. Pre-construction “soft costs” against the remaining \$100,000 have been submitted, and it is anticipated that any remainder will be fully consumed before the end of FY22.
4. Will this project be modular or site build? That decision is still being vetted between our development partner, Blue Line Development, and prospective contractors.
5. What remaining funding, permits, and approvals are needed to begin site work on this project? Funding needed to commence construction is secured. There is an old trail easement held by BSOA that needs to be retired, which has been preliminarily approved by that body’s board of directors, and only needs to be reviewed by their counsel for final action. Final approval is expected by all parties. While there are still DEQ, Land Use and Will-Serve permits to be secured prior to occupancy, site work can begin upon closing.
6. What are the anticipated parking needs for this project and how does this compare to the number of occupants? The minimum spaces required by Gallatin County Planning & Zoning is 130, and the project will offer 140 spaces. While this is a 30% decrease from the optimal parking (as determined by GCPZ), this is the maximum the topography allows, while maximizing the number of units. The project does include a significant Skyline bus stop, and the target demographics of the project’s tenants (primarily in the LMLC portion) assume a high level of pedestrian and public transportation utilization.
7. Please explain all previous funding (BSRAD and other) and current requests (BSRAD and other) for this project and how they will be used. In FY21, BSCHT was allocated \$1.4M for this project from BSRAD. \$1.3M is intended for land purchase, and \$100,000 for initial design/preconstruction work. In FY22, BSRAD allocated BSCHT \$500,000 for construction work. The Montana Board of Housing awarded \$6.49M in the form of a Low Income Housing Tax Credit (LIHTC) grant, to be used for construction.
8. How will the rental income be used if the construction of the units is covered in full? The federal LIHTC grant heavily regulates the financial terms and structure of the project. As per these terms, for the first fifteen years of the project, rental income is used to pay deferred development fees, payments to the investment partner and debt service on the construction loan.
9. Can you clarify the \$2.2M under “other” funding on the Project Budget is a mortgage taken out by the Housing Trust? if not please explain where it comes from Yes this is a bank loan taken out by the Operating Partnership formed between BSCHT, the Development Partner (Blue Line Development) and the Investment Partner (Boston Financial). Gap funding has always been projected to come from traditional construction loan financing and has been built into the project budget.
10. Can these local workers be employed anywhere within Big Sky to qualify? Yes. The BSCHT portion of the project will be open to any local workforce who qualify under the terms of the LIHTC grant (income limits linked to area AMI, primarily). Rental plus utility rates for these two

buildings are also tied to a limit of 30% of the tenant's household income. In addition, 20% of the portion of the project being built by LMLC will be available to Big Sky's general work force via master leases to employers through BSCHT.



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky Community Organization

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6:
 - i. Whitney Montgomery – whitney@bsco.org - ZOOM
 - ii. Ashley Curtis – ashley@bsco.org
 - iii. Adam Johnson – adam@bsco.org
 - iv. Kate Ketschek - kate@revolutionhousemedia.com
 - b. June 9:
 - i. Whitney Montgomery – whitney@bsco.org - ZOOM
 - ii. Ashley Curtis – ashley@bsco.org
 - iii. Adam Johnson – adam@bsco.org
2. Does your organization seek funding from sources outside of the BSRAD boundary?
 - a. **Yes. We seek funding from the following:**
 - i. Gallatin County Open Lands Funding (The Gallatin County Open Space Levy)
 - ii. The MJ Murdock Charitable Trust
 - iii. Individuals whose primary residence is outside the BSRAD boundary
 - iv. One Valley Community Foundation
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?
 - a. **BSCO has successfully focused on recruitment and retention for key staff over the last 14 months. In our FY22 budget, all staff received significant pay increases to a living wage, and new hires started at a living wage. We also improved benefits such as better health insurance while maintaining a retirement plan. In the FY23 budget, there is a 4% cost of living increase for all staff, plus supplementary merit increases. In addition to providing competitive compensation and benefits for all staff, BSCO intentionally works hard at creating a very positive workplace culture where individuals are acknowledged by their good work in serving the Big Sky community.**

4. Please explain the “Other” revenue in the Current FY outlined on the Sponsor Efficiency Worksheet.
 - a. **“Other” revenue is comprised of a combination of rent at BASE received from the Arts Council of Big Sky and room rentals, plus interest income.**
5. Provide an update on the BSCO/BSSHA merger.
 - a. **The BSCO/BSSHA merger is going very well. At the same time we are working through legal documents to officially merge, the BSCO team is regularly meeting with BSSHA leaders to advance program planning for next winter. In addition, BSCO is applying to be members in Montana Amateur Hockey Association and USA Hockey Association. Affiliations with these two organizations will provide access to coaches training, games with other teams in Montana, additional insurance, and program support.**
6. Please provide a summary of the easements/agreements and the lifespan of these for all trails and trailheads managed by BSCO.
 - a. **BSCO holds 41 individual easements/agreements that support 24 miles of trail within the BSCO Community Trail system, as well as an additional five miles of trail and two trailheads that are secured as part of ongoing trail projects. Of these easements, all but a single easement is written in perpetuity which ensures permanent public access for the community. BSCO also supports USFS trailheads for Ousel Falls and Upper Beehive Basin by holding deeds to the 26 acres of open space that the trailheads and trails cross, thus securing them in perpetuity.**
7. Do you have a long-term capital improvement plan?
 - a. **Yes, we have a Master Parks Plan and a Master Trails Plan. Both of these plans are directional by design. They maximize playing fields, increase tennis and pickleball courts, enlarge the skate park and pump track, as well as plot trail connectivity. BSCO will develop the cost side of these plans as we incrementally implement them.**
8. On the LOI you listed \$1,760,000 as your “FY24 Predicted Request” and \$1,925,000 as your “FY25 Predicted Request”. When cross referenced with project data the total projected amounts come to \$2,755,000 in FY24 and \$2,917,000 in FY25.
 - a. Please explain the discrepancy in predicted requests for both FY24 & FY25
 - i. **Operations and maintenance of both Parks & Trails and BASE were accidentally counted twice. We included them in the FY24 (3) Project and FY25 (3) Project in the LOI, and they were also included in the application FY24 forecast and FY25 forecast.**
 - b. Please clarify the organizations predicted requests for both FY24 & FY25
 - i. **Since submitting both the FY23 LOI and the application, we have done a lot of work to both the BASE operations budget as well as the Parks and Trails operations budget. With these two recurring projects and some additional one-time projects, our predicted FY24 and FY25 budgets have overall decreased. Our FY24 request is budgeted to be \$1,605,000 and our FY25 request to be \$1,667,000.**
9. What other sources of funding have you explored?
 - a. **In addition to fundraising, BSCO is currently working with the Big Sky Trails Recreation and Parks District for an alternative funding source now that the interlocal agreement has been extended. As BSCO programs grow, we also will experience revenue growth.**

10. Your request this FY is significantly larger than your project request last year for FY23, what has changed within the last year to create this increase?
- i. **There have been several additions to what we believed our request would be for FY23. These include a one-time BASE construction request of \$500,000, which will be matched dollar for dollar by the Yellowstone Club Community Foundation. The BASE operations request increased due to the original FY23 BASE expense forecast lacking key preventative maintenance contracts and other unknown expenses. In FY22, it was projected that our FY23 ask for BSCO/BASE Operations was \$138,701. The Parks and Trails Operations request increased primarily to keep up with the growing use of the parks and trails that result in more maintenance and cleaning required. There also were new projects including resealing the asphalt trails, 2nd floor addition of the maintenance building to accommodate workforce housing and, the Western Institute Traffic study.**
11. Are there any projects you projected last year to request this year that you have not included and if so, why?
- a. **Yes, last year we included the following projects in our FY23 application that have now been either delayed or funded from a different source:**
 - i. **Toolcat equipment – funded from Gala event proceeds**
 - ii. **Playground Install – Delayed due to TIGER Grant**
 - iii. **Tennis courts – In collaboration with the tennis and pickleball groups in Big Sky, BSCO successfully fundraised to cover the costs of resurfacing the tennis courts.**
 - iv. **Restroom in Community Park: The restroom was delayed due to the playground not being moved yet as part of the TIGER grant.**
12. Are there any projects we funded last year you were not able to complete, if so, why?
- a. **No**
13. Your administration percentage has grown significantly to 34% of your overall organizational expenses, what changes have occurred to cause this significant increase?
- a. **Following the format of the Resort Tax application, our 34% administrative percentage is comprised of a contingency of \$282K and the CEO, Controller and Administrative Assistant’s full salaries. If you remove the \$282K contingency, our administrative percentage drops to 26%. In addition to this, although we included the full salaries of the three positions listed above, each of these positions has direct responsibility in the programming that BSCO provides to the community. By allocating some of these salaries to program delivery to properly represent their roles, the administrative percentage would be close to 20%.**
 - b. What plans do you have to bring your administrative costs percentage down?
 - i. **After removing the contingency from our administrative costs and properly allocating program portions of administrative salaries, we are well within the range of what an acceptable administrative percentage should be for an organization our size.**

14. Your requests to BSRAD have increased drastically the past 2 years from FY21 to FY22 increase was 80% and FY22 to FY23 is 90%, are your other revenue sources growing at this same rate to ensure a healthy reliance ratio on BSRAD?

- a. **In FY21, BSCO reduced the funding needs significantly to support COVID Relief, which was the request of Resort Tax at that time and is one reason for the increase year-over-year. Another cause of the increase between FY22 and FY23 is the addition of BASE. BASE, the Len Hill Park purchase, and constructing the new permanent ice rink, which were requested by our community, are extraordinary amenities for Big Sky that totals nearly \$23M in new infrastructure. The one-time BASE construction request of \$500k is to complete the entire project and meet the dollar-for-dollar match provided by the Yellowstone Club Community Foundation. The increased funding request for BASE operational support is largely to ensure BSCO properly maintains these new community assets.**

If you include the \$21M raised for the entire BASE project from sources other than the Resort Tax, BSCO's revenue growth has far surpassed the percentage increase of our BSRAD requests.

- b. What plans do you have to decrease your reliance on BSRAD?
- i. **BSCO continues to diversify our revenue streams to reduce reliance on BSRAD. For Parks and Trails and the ice rink, which are no cost to use by the public other than playing field fees, BSCO is strategically retooling our fundraising efforts. One current example is moving the gala to BASE to grow the event and increase ticket sales while introducing a larger audience to BSCO's focus on providing outdoor recreation to Big Sky's residents and visitors. For BASE, Camp Big Sky, and other BSCO programs that have a fee, BSCO will target additional donations so we can maintain a low fee structure for our residents. An example of this will be to create a major donor giving circle focused on programs. Additionally, BSCO is working diligently with the Big Sky Trails Recreation and Parks District as a future funding source by forming a legal partnership that allows access to other revenue streams. Finally, BSCO will grow recreational athletic programs that will have a small fee for participants to add to BASE membership revenue. With this concentrated effort to diversify funding streams and grow program revenue, overtime BSCO will reduce reliance on BSRAD for operational funding.**

15. Can you explain the significant decrease in donations? I am guessing it is all relative to BASE, but if you could confirm and explain please.

- a. **Our donation decrease is due to the BASE Capital Campaign that has been ongoing the last 4 years and is now nearly complete.**

16. What is BSCO's history with requests to the Gallatin County Open Space committee?

- a. **We received \$115,000 of funding in 2006 for the purchase of land to expand the Community Park. In 2021, we received \$75,000 for our maintenance building project in the Community Park.**
- b. Does BSCO plan on applying to this fund in the future?

- c. Trail grooming and plowing during the winter months
 - i. **A majority of the winter trails lie on top of existing summer trails, which are secured through the same easements above, which are in perpetuity. These winter trails provide needed recreational space in the winter months and keep the trails usable on a year-round basis for all the community and visitors alike to use.**
- d. Consistent grounds maintenance of the parks system
 - i. **Consistent ground maintenance is needed for the parks system to keep safe and enjoyable for our community in perpetuity.**
- 2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
 - a. **There are two initiatives that our Parks and Trails Operations and Maintenance is addressing:**
 - i. **Additional 20 miles of trails and paths in resort district by 2025**
 - ii. **Increase park and open spaces by 35 acres by Q2 2024**
- 3. Please provide metrics for the goals listed on the application
 - a. To serve both the community of Big Sky and the tourist for which our community depends on by providing world class recreational opportunities
 - i. **BSCO maintains trail counters to collect the total number of users on the trail system. Additionally, data from trail map software, such as Trailforks, can be harvested to assist in determining the number of visitors vs locals using the trail system.**
 - b. Maintain the high-quality trail system for the safety of the Big Sky community and tourists that they rely on for outdoor recreation
 - i. **BSCO maintains a system of trail counters across the trails system, including the winter community trails to track user numbers on each trail. These numbers have been increasing every year since the first counters were installed in 2016. BSCO also has the volunteer Trail Ambassador program that operates on the trails and collects data on users encountered and gathers feedback from other trail users.**
 - c. Maintain the high-quality field and park space that is used by the community, youth programming, athletic leagues and tourist
 - i. **BSCO maintains vehicle counters at the entrance to the Community Park parking lot to collect data on user numbers and visitation patterns of the park. We also solicit feedback from the various user groups including youth athletic leagues, on the condition of the park amenities.**
 - d. Ensure that all public restroom facilities are clean and useable that are throughout Big Sky in the parks and trails
 - i. **The BSCO parks and trails maintenance team checks and cleans the public restroom facilities on a daily basis. In 2021, BSCO supplied a total 1,200 rolls of toilet paper to the public restrooms between the Community Park, Ousel Falls, and Beehive Basin.**
 - e. Upkeep and maintenance of the historic buildings and grounds of the Historic Crail Ranch which showcases the history of the Big Sky area

- a. As you will see in the application for the Community Park Redesign & Engineering, which is to remake the park to maximize recreational space so that it can better serve our community, there is a great deal of work to do. The needs were identified by the community in creating the 2017 Parks Master plan. Also recognized in the 2017 Master Parks plan was the need for a community recreation center, which is now completed as BASE. BSCO is also self-funding, through Gala proceeds, along with securing other funds outside of BSRAD, new field space on the recently acquired land adjacent to the Community Park. The new fields will be available for community use in July 2022.
10. Where is the income of your Parks & Trails Gala being shown on your budget or is that income dedicated for another project/program not included in operations?
 - a. The Gala funds are shown on the budget under events. The 2021 Gala funds were used to purchase maintenance equipment for the parks and trails, which had originally been planned for a 2022 BSRAD request. The remaining proceeds from the Gala were used to fund the creation of additional field space on the recently acquired parcel adjacent to the Community Park.
11. Have you worked with the athletic leagues to better coordinate your field management and maintenance? For example, last year the fields were aerified in the middle of soccer season and cores were left all over the fields providing a poor experience for any teams traveling here for game and for the teams practicing.
 - a. Yes, we have and continue to work with athletic leagues on the field management and maintenance. We have collaborated with little league baseball to expand infields to meet requirements for them to host home games. Additionally, we resurfaced all of the softball fields with new material to ensure the best playing conditions possible. With regards to the example of the soccer fields, please know and realize that Big Sky is located in a high mountain environment that has a very short growing season and rapidly growing demand for use. There are teams using our fields before the grass can establish after the winter melt and persisting well into the heavy rains and first snowfalls in the fall. We follow the best practice guidelines for soccer field maintenance to ensure a safe and soft field surface, which outlines the need for aeration in the early spring and mid-fall. The pressure on our fields is such that we have to aerate in the middle of the spring season or in the middle of the fall season. We chose the fall season to ensure the field could withstand the weight of machinery and not cause additional damage to the field.

Project Name: BASE Construction Costs

Project Questions:

1. What is the expected lifespan for the deliverables provided on the application?
 - a. BASE construction loan paid in full - December 2022
 - i. **50+ Years**
 - b. BASE Pass sales reports - Mid Year Impact Report
 - i. **50+ years or, as long as the building is open**
 - c. BASE Pass usage reports - Mid Year Impact Report
 - i. **50+ years or, as long as the building is open**

2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
 - a. **Open BASE as an Accessible Recreational & Community Center.**
3. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. **Yes, the ability to complete BASE without carrying long-term debt allows BSCO to operate the new facility with affordable membership rates and to provide world class year-round recreation to the community of Big Sky. This includes areas of art & education, and health & safety as it relates to behavioral health by providing the community a safe space to connect and recreate.**
4. Where are you currently at with the additional funding?
 - a. **We have raised \$727K in community donations with an additional \$125K in pledges not yet received from the community. We have secured a grant to use as a match from the Yellowstone Community Club Foundation of \$1 million. This \$1 million match is paid in two segments. The first, which we have already received, was payable when we reached the first \$700k in donations. The remaining \$500K will be matched if Resort Tax funds BSCO's BASE Construction request.**

Project Name: BASE Operations and Maintenance

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. **Yes, collaboration with other impact areas include Arts & Education and Health & Safety. The Arts Council of Big Sky has space in the BASE building which allows public access to art and art education for the community. Health & Safety is a top priority at BASE from physical safety to behavioral health. We offer a variety of different programs such as yoga and spin classes to assist in overall behavioral health in the community. We have also hosted a variety of workshops on behavioral and mental health, and we recently initiated a collaboration with the Big Sky Library to provide a safe space for story time for parents with young children.**
2. Provide an update on Membership Sales.
 - a. **As of 5/17/22**

| Pass Type | People w/ Passes | # of Passes Sold |
|-----------------------|---------------------|------------------|
| Couples (Annual Pass) | 432 | 216 |
| Family (Annual Pass) | 526 | 123 |
| Single (Annual Pass) | 346 | 346 |
| Seasonal - Winter 22 | 88 | 88 |
| Seasonal - Summer 22 | 11 | 11 |
| Punch Pass | 75 | 75 |
| Day Pass | 397 | 397 |

3. Is your request to us impacted by the # of members that you have?
 - a. **No, this year's request is not impacted by the number of members. We do anticipate future requests being lower due to successful membership fee revenue collection.**
4. Where is the income of your current operations and scholarship fundraising campaign being shown on this budget?
 - a. **The current operating income is included in the dues, fees, and sales section of the project budget.**
 - b. **Scholarship fundraising is included in the fundraising section.**
5. What is your long-term expectation for BSRAD financially supporting this facility?
 - a. **In most cases, recreational facilities such as BASE are funded through tax revenue collected by the city. Since that is not the case in our community, we do expect Resort Tax to support the operations for BASE on an annual basis. We are not expecting Resort Tax to pay for the entire operations of the facility, but a portion of the delta between membership revenue and total expenses to be funded by Resort Tax.**
6. What does it cost for the building to operate excluding any staff people and program pieces, simply the actual building operation cost (service contracts for systems, lights, heat, insurance, water/sewer, etc.)?
 - a. **The costs to operate the building, not including any staff or expenses that go along with personnel or programs, is projected to be \$191,552 annually. With only a few months of operations to date, we continue learning the total cost to operate the building responsibly.**

Project Name: Community Park Redesign and Engineering

Project Questions:

1. What is the expected lifespan for the deliverables provided on the application?
 - a. Design and engineering
 - i. **The design and engineering is the first step of this process, and it will determine the capital improvements needed in the community park over the next three to four years. These capital improvements we intend to last in perpetuity with annual maintenance.**

2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
 - a. **Increase park and open spaces by 35 acres by Q2 of 2024**
3. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. **The Arts Council of Big Sky joined the community planning event for the redesign, and we have been looking at how to incorporate art and sculptures into the park. The redesign will increase access routes to the Community Park, supporting the Transportation initiatives of making “Big Sky a car free town” and “Appropriate Multi-modal Infrastructure that Helps to Reduce Transportation’s Environmental Impact is Built & Maintained in the Community” through the proposed pedestrian bridges which includes the bridge in the TIGER Grant.**
4. Do any of your long-term park plans include a dog park?
 - a. **Yes, we are looking into suitable locations for a dog park which is not in the Community Park design plan.**
5. Was public input collected for the redesign?
 - a. **Yes, BSCO hosted a community planning charrette in December of 2019 that was attended by 40 community members, open to all in the community, to help us drive this redesign. We are incorporating community input that is continually being provided through our website, in person, and talking to users within the Community Park.**
6. Will the completion of the engineering result in a future capital project and request?
 - a. **Yes, the engineering will result in future capital projects and requests to BSRAD and the Gallatin County Open Space fund.**
7. Is any of this necessary so that it is tied to any changes to the park that the TIGER grant projects will create?
 - a. **Yes, the initial redesign concept came out of the new pedestrian bridge and trail that will lead into the Community Park as a part of the TIGER grant.**
8. Do you plan to integrate the additional land you purchased in 2021 adjacent to the existing park into this plan?
 - a. **Originally this was not part of the plan. However, since purchasing the property in 2021, we began utilizing this land for additional field space that can be used by the community for youth programming and youth sports leagues.**
9. Have you been working with the various stakeholders such as neighbors, athletic groups (softball, baseball, soccer, tennis), GRTF (for storm water piece), to ensure all voices are heard? Ensuring the groups that will often utilize the park is critical.
 - a. **Yes, all the sports leagues and user groups were invited and were involved in the community planning charette held in December of 2019. We have continued to work with all of our neighbors, specifically the Water and Sewer District, Big Sky Resort with the Golden Eagle, and the BSCHT with the Meadowview development. We continue to work with all the youth sport leagues to help provide the field space for their**

programming. We also collaborate with the Gallatin River Task force on stormwater management as this plan will provide the engineering to remove the stormwater detention pond easement from the soccer field while shifting and increasing detention and infiltration capacity to other areas of the park, bolstering the stormwater runoff capacity of the park, and better protect the Middle Fork of the Gallatin River. This supports the Natural Resources initiative of “Improve Water Quality of Local Streams & Aquifers”.

- b. Do Big Sky’s facilities meet tournament requirements? If not, why?
 - i. Yes, with an effort this past fall to expand the infield of softball field #2 it will meet the requirements to host little league baseball games. We have hosted the high school soccer program for two years as our field meets the minimum requirements set forth by the governing body. However, to host soccer tournaments for youth leagues in Big Sky, additional field space is needed to play multiple games at a time.

Project Name: 5-Year Recurring Asphalt Sealing

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
 - a. **Under the “Big Sky Transportation and Infrastructure Strategy,” this project is firmly in support of the initiatives of “making Big Sky a car free community” and the “Appropriate Multi-modal infrastructure that helps reduce transportation’s environmental impact is built and maintained in the community.” It addresses and helps achieve both initiatives.**
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. **Yes, the asphalt trails assist in the economic development and the housing impact areas. The trail provides alternative transportation methods that helps the workforce move around the community without vehicles, and the trail is integral in making Big Sky a car free community. The asphalt trail further connects the dirt recreation trails that are drawing visitors and new residents alike to our community. By providing this asphalt trail in a well-maintained condition, BSCO is encouraging community members to “Reduce Transportation Emissions” as outlined in the Sustainability strategy**
3. If this project is needed only once every five years, why would you not contract these services rather than own the equipment?
 - a. **BSCO is not performing this maintenance ourselves. This service is being contracted out as we do not own the equipment, nor do we have the staff expertise, to complete the asphalt sealing.**
4. Can this and projects like this be included in your Parks & Trails maintenance and operations in the future to save you time with your BSRAD applications?
 - a. **Yes, we could include them in future maintenance and operations to save us time on our BSRAD applications.**

Project Name: Western Transportation Institute Safety Study

Project Questions:

1. What is the expected lifespan for the deliverables provided on the application?
 - a. Pop Up Traffic demonstration projects showing complete street/traffic calming concepts in Town Center and Meadow Village.
 - i. **The pop-up traffic projects are designed to be temporary and can be removed during the winter months to facilitate winter maintenance of the roads but can be reinstalled in the summer months when our local population is more dependent on pedestrian and non-motorized modes of transportation.**
 - b. Technical memo of Big Sky pedestrian/bike friendly alternatives that may be used to create safe connections from neighborhoods, HOA's and other community facilities.
 - i. **The deliverables of the technical memos do not have an expiration date and can be used by any HOA or organization in Big Sky to create safer pedestrian and non-motorized improvements that will benefit the community for decades to come.**
 - c. Community based final presentation to provide overview of technical memo/infrastructure guide, pop up projects and next steps.
 - i. **The purpose of the final presentation is a one-time deliverable but is aimed to share with the community where and how to find cost efficient solutions to improve our pedestrian and non-motorized transportation across the community.**
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
 - a. **Appropriate multimodal infrastructure that helps to reduce transportation's environmental impact is built and maintained in the community.**
3. Please provide metrics for the goals listed on the application
 - a. Provide guidelines and direction for HOA and other community associations for creating safer pedestrian and cycling environments.
 - b. Low-cost solutions using existing infrastructure.
 - i. **The metric for both goals is a document outlining solutions, costs and where these improvements should be located that can be used by the community in the immediate future to improve pedestrian safety. These suggestions will be provided by the leading institute for transportation safety in the region.**
4. Is there an end date to this research?
 - a. **Yes, the research will be completed in the fall of 2022 to compile findings that will be presented to the community. The practices and methods of this research will be made available for the community to continue the data collection and monitor effectiveness in the future.**
 - b. How will the findings be used?
 - i. **The findings of the study will be used to provide recommendations of safety improvements that can be made to Big Sky's existing infrastructure, such as recommended solutions for traffic calming (slowing traffic) on both busy roads**

such as Ousel Falls, Little Coyote, Spruce Cone, and Andesite Roads as well as neighborhood roads such as Aspen Leaf Drive, Big Pine View, and Black Otter.

- c. Will the results of this study result in future capital projects and requests?
 - i. **Yes, but the goal of this is to provide low costs solutions for our current infrastructure. We expect these solutions to be minimal.**
5. Will this study take place concurrently with TIGER grant construction? If so, how will the construction effect findings?
 - a. **Yes, as the TIGER grant is scheduled to be completed over a three-year period, this study will overlap with the construction. While it is not possible to foresee every impact the construction will have on the study, based on the community's previous experience with construction on Highway 64, traffic will migrate into the residential areas and further highlight the need to address safer conditions for pedestrians and cyclist. It can be estimated that the traffic seen during the TIGER grant construction will be indicative of what traffic patterns may look like in the future as Big Sky continues to grow. This gives us the opportunity to plan and see the effectiveness of possible solutions now.**
6. Are you partnering or using vehicle data compiled by SNO in any capacity on this project?
 - a. **In recent years, many organizations have collected vehicle data across the community, and we will work with these organizations on using existing data. As the study is focused on making non-motorized and pedestrian usage safer, we will not focus only on vehicles, but also expand data collection to the pedestrian and non-motorized usage in our community.**
7. How are you reaching out to various HOAs to gain support and potential assistance in this program?
 - a. **We have had discussions with various HOA's about this study. According to State of Montana regarding the establishment of the local resort taxes, "The fundamental idea behind resort taxes is to allow places with high numbers of visitors, but relatively few residents, to manage the wear-and-tear on local infrastructure without overburdening local citizens." This study falls in line with that definition as it aims to create a safer environment for all our residents as we deal with increasing visitors. Thus, BSCO is asking Resort Tax for matching funds for 50% of the study since the remaining 50% is covered by the Western Transportation Institute.**

Project Name: Maintenance Building Completion

Project Questions:

1. What is the expected lifespan for the deliverables provided on the application?
 - a. The additional floor on the BSCO parks and trails maintenance building at the community park
 - i. **The building and workforce housing is expected to have a 50-to-75-year lifespan.**
 - b. The ability to add two 2-bedroom employee housing units without the need to purchase, construct, or acquire a separate building
 - i. **The building and workforce housing is expected to have a 50-to-75-year lifespan.**

- c. Outfit the maintenance building with necessary tools required for the safety and upkeep of all parks and trails operations.
 - i. **Having the proper tools to maintain our parks and trails infrastructure effectively and efficiently will add years to the life span of all assets within the system. The tools to be purchased have an estimated lifespan ranging from 10 years to 25 years.**
- 2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
 - a. **Increase the Supply of Rental Housing for local workers**
- 3. Please provide metrics for the goals listed on the application
 - a. The addition of the second-floor structure for the BSCO parks and trails maintenance building that meet building codes and requirements for two 2-bedroom units to serve as employee housing.
 - i. **Receiving a certificate of occupancy from the county which states we have met the building codes and requirements for the multiple uses of the building, and it can be used for workforce housing.**
 - b. Purchase of necessary tools to aid in the outfitting of the BSCO parks and trails maintenance building
 - i. **To decrease the costs to upkeep the current BSCO Parks and Trails maintenance equipment which can provide a longer lifespan to the current equipment.**
- 4. How is this project working to address the need outlined in to 2018 Big Sky Community Housing Action Plan?
 - a. **On page 4 of the 2018 Community Housing Action Plan, the actions identified in the plan as the primary goal is: "To provide a diversity of housing affordable for the community in order to grow and retain a strong base of residents and employees living in Big Sky, which will support the local economy and enhance the character of the community." BSCO plans to provide available workforce housing for our employees to assist us in retaining a strong workforce, while also helping reduce the pressure on existing rental market in the community.**
- 5. What are the "Other" revenues outlined in your project budget?
 - a. **BSCO received \$75,000 last spring from the Gallatin County Open Space Fund to assist with the building alongside the FY22 \$246,000 from Resort Tax. We will be dedicating a portion of the remaining funds from the 2021 Gala as well as a portion of the funds from the upcoming 2022 Gala to cover the remaining costs of the building.**
- 6. How many occupants will be housed in these units?
 - a. **We will house four staff members in these units with two employees per unit. Or, one of the apartments can be used by a staff member with a small family.**
- 7. What remaining permits and approvals are needed to begin site work on this project?
 - a. **We have the Gallatin County Land Use Permit and the Conditional Use Permit in process right now. The workforce housing, per the zoning of the parcel, is a permitted use. We will need a conditional use permit for the maintenance shop portion of the project.**
- 8. Is the housing only for BSCO employees?

- a. Employees of BSCO will have first option. If space is available, non-BSCO workforce is eligible to apply.**
- 9. Just to be clear this cost is the architectural plans, the construction costs are not known yet for this addition and are not being requested of BSRAD?
 - a. This project is for a portion of the maintenance building construction costs. The architectural plans are already complete. Construction costs for the entire building are estimated to be approximately \$450,000 pending the variable costs of materials seen currently in the construction industry.**
- 10. Are two-bedroom units the best use of the space or would you be better off with more studio type units for additional staff so they can have their own space?
 - a. The BSCO staff and board have evaluated both styles of housing and given the constraints of the building site and building footprint, the two units would be the most efficient style of workforce housing for our organization. This gives our organization the ability to attract professional positions, such as a Development Director, who may have a family.**
 - b. Do you have any additional housing projects under consideration?
 - i. No, at this moment we do not have any additional housing projects under consideration.**
- 11. Have you been working with Housing Trust to vet this idea and learn from them based on the knowledge they have acquired while creating housing?
 - a. Yes, we have had discussions with the Housing Trust about the project. The Housing Trust has provided a letter of support which is included in our application.**
- 12. What will you do with the units if you don't have a staff person living in them? While this may not be the case in the next 5 years, it could be realistic in several years if the housing trust accomplishes a number of their goals.
 - a. We have designed the building to meet codes for housing and office space, and thus, if there is not a housing need, we can use the space for additional office space. We recognize that the population of Big Sky will continue to grow, and our recreation infrastructure must grow with it, which means our staff must grow. This holds true for every business and organization in Big Sky. While the BSCHT is spearheading the effort to alleviate the affordable housing issue, they cannot single handedly solve the issue for the entire community. We as a community must assist where we can and adding this housing to our project is an effort by BSCO to play our part in that assistance.**

Project Name: Parks and Trails Equipment

Project Questions:

- 1. What is the expected lifespan for the deliverables provided on the application?
 - a. Additional snowmobile for grooming trails. This will allow us to expand the winter trail system and provide redundancy for equipment maintenance. Deposit has been made on the snowmobile already to ensure its availability for next winter due to supply chain issues.
 - i. The snowmobile will have an expected life span of ten years. Our current snowmobile will be on its fourth-year next season. The additional snowmobile**

- will allow us to alternate their replacements over time to avoid replacing multiple snowmobiles concurrently.**
- b. Identification of the most appropriate sunshade solution for limiting solar melting of ice. This should be completed in 2-3 months.
 - i. **The lifespan of the shade solution will be determined by the type and recommendation of the feasibility portion of this ask. It will not be known until recommendations have been made.**
 2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
 - a. **Additional 20 miles of trails and paths in resort district by 2025.**
 3. Please provide metrics for the goals listed on the application
 - a. Additional snowmobile for grooming trails. This will allow us to expand the winter trail system and provide redundancy for equipment maintenance. Deposit has been made on the snowmobile already to ensure its availability for next winter due to supply chain issues.
 - i. **Additional volunteer hours through our Winter Trail Grooming Program.**
 - ii. **Additional miles to be groomed for recreational use.**
 - b. Identification of the most appropriate sunshade solution for limiting solar melting of ice. This should be completed in 2-3 months.
 - i. **Extended ice season.**
 4. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. **This project is in collaboration with the Health & Safety Impact Area. The additional snowmobile would allow us to groom trails more efficiently, thus making them safer for the community and tourist to use. The engineering for the sunshade solution will allow us to determine the appropriate solution needed to minimize the ice melt on the current ice rink making it safer for the community and tourist to use.**
 5. Is BSSHA bringing any funding for the shade solution?
 - a. **No**
 6. Does the feasibility and engineering for the sunshade get you a sunshade or just the plans for a special sunshade for the rink?
 - a. **No. This will be used to determine the most effective solution to minimize ice melt on the current rink.**
 - b. If this is the case, how do you plan on acquiring the shade to ensure the longevity of the ice?
 - i. N/A



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky Discovery Academy

Sponsor Questions:

1. Please provide the names and email of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Scott Poloff – spoloff@bigskydiscoveryacademy.org
 - b. June 9: Scott Poloff – spoloff@bigskydiscoveryacademy.org
2. Does your organization seek funding from sources outside of the BSRAD boundary?
 - a. No
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? Like most educational institutions, our staff and teachers are paid according to a set scale. For each year of experience, there is a pay increase, as well as for educational attainment and taking on additional responsibilities. For the next school year, the Big Sky Discovery Academy's board increased salaries at least \$2,000 and up to \$6,000 for teachers and more for administrators.
4. Please explain the large FY25 Forecast increase.
 - a. Our lease is up in 2026 and we have begun exploratory investigation into the process of building a new campus.
5. Please explain how payroll and benefits decreased from the previous to the current fiscal year while the total # of FTEs increased by 5. (As outlined on the Sponsor Efficiency Worksheet)
 - a. In previous years, Big Sky Discovery Academy utilized numerous part-time employees to meet needs. This year, the school's employees are all full-time and We out-sourced marketing and payroll operations.
6. Do current community-wide facilities address Big Sky's educational needs?
 - a. No. There is a need for school choice at every level in Big Sky. Children and teens do not all have the same learning styles, and a Montessori school can be more flexible and meet the needs of a wide range of students. For some families, public school is not an option due to schedules and safety. Some of our high school students need more flexibility in their schedule as they pursue athletic and academic interests outside of the school.
 - b. We are anticipating our enrollment will grow to approximately 70 students. We have 8 families on the waiting list for Early Childhood. We could expand the enrollment at the MS/HS level but there is no space for us to host more families. Recruiting additional teachers is challenging as there is little affordable housing for teachers/staff.

7. What gaps exist in childcare and education in Big Sky?
 - a. It is simple supply and demand. As our community grows, there are more children here. We could help meet this demand by expanding and opening an Infant and Toddler room and a second Early Childhood classroom. The need is there. However, we do not have the space, housing or staffing to support it. The gap is that there is no affordable housing. Even with a full-time starting salary of \$40,000 teachers/staff do not want to make the drive from Bozeman on a daily basis.
8. Have you met with Morningstar, the School District, the Library, after school program providers, and Camp providers to establish baseline metrics for education and childcare in Big Sky?
 - a. We have attended meetings with several community providers about programming. We seem to have the same concerns.
9. On the LOI you listed \$100,000 as your “FY24 Predicted Request” and \$500,000 as your “FY25 Predicted Request”. When cross referenced with project data the total projected amounts come to \$88,000 in FY24 and \$614,000 in FY25
 - a. Please explain the discrepancy in predicted requests for both FY24 & FY25
 - i. We are not asking for playground equipment in FY24. (Difference between \$100,000 and \$88,000 = \$12,000). Then we are asking for all three areas to be granted again in FY25 in addition to \$14,000 more in housing and then the \$500,000 to -break ground on a new school.
 - b. Please clarify the organizations predicted requests for both FY24 & FY25
 - i. We will continue to ask for support with tuition assistance and employee housing stipends for both FY24 & 25. The extra funding in FY 25 is for additional housing (staff expansion), the return of updating playground equipment and materials and the starting of construction on a new campus.
10. What plans do you have to bring your administrative costs percentage down?
 - a. The leadership team next year has been reorganized from three members (Head of School and an Upper School Director and Lower School Director) to two (Head of School and Assistant Head of School). Some responsibilities have been distributed to other staff members who will also receive additional stipends for the new responsibilities
11. Can you explain your budgeted decrease in private donations?
 - a. We cannot guarantee donations from year to year. So, looking over the past three years, Discovery has averaged around \$100,000 in donations. We have achieved that level each of the past two years, but there is no guarantee that we can meet it going forward in an unsure economy. So when constructing the budget, we felt it was better to underestimate than overestimate and then have our budget be underfunded.

Project Name: Early Childhood Tuition Assistance Program

Project Questions:

1. What are the funding sources for Tuition Assistance for non-early childhood students?
 - a. We have 3 fundraisers that we did this year and plan to do annually. The funds for these are used to cover various programs during the school year, including Tuition Assistance for all ages. All of our funding from Give Big is used to cover Tuition Assistance. The funds received this year will be allocated to individual families based on need. We are expected to allocate over \$140,000.
 - b. Have you requested this funding to supplement Resort Tax funds for this request?
 - i. We have only asked for \$32,000 from Resort Tax. We will use an additional \$16,000 from our Give Big Funds to cover the additional costs needed for Early Childhood Tuition Assistance. This past year, we used only \$21,000 of the allocated \$42,000. So the remaining funds were left unused/allocated and remained with Resort Tax.
2. How many students and what is the average amount of aid received?
 - a. We have 25% (5) of our students in Early Childhood receiving tuition assistance. Amount of assistance per family ranges from \$8,000 – \$11,500 in assistance per family.
3. Have you investigated other funding sources to use as a match? If no, why and if yes please provide details.
 - a. We use matching funds when we host our Give Big Fundraiser. This year, we secured \$50,000 from donors that were available for matching funds. We will be using some of those funds to cover the amount of assistance needed above the \$32,000 that has been requested from BSRAD.

Project Name: BSDA Teacher Housing Stipends

Project Questions:

1. How is this project working to address the needs outlined in the 2018 Big Sky Community Housing Action Plan?
 - a. Having reviewed the 2018 Big Sky Community Housing Action Plan, we recognize that the majority of our staff is part of the market whose needs for rental units are not being met in Big Sky.
 - b. While we have encouraged families and friends of BSDA to convert ADUs and other housing units into long term rental units, and have had staff utilize some of those units, it is not enough to meet our needs. The need for long-term housing greatly outpaces availability.
 - c. We need to take immediate steps to assist our staff. Waiting for affordable long-term housing to become available is not an option. This stipend is to help them immediately.

2. Is this stipend for all staff and teachers or just the Early Childhood staff and teachers? How many teachers/administrators are there to give this to?
 - a. This stipend is for ALL teachers and staff, excluding our Head of School .
 - b. We currently have 13 staff (including teachers and administrators) total. We are asking for \$4,000 for all staff. The additional \$4,000 would be available should we expand our staff. The stipend is for all staff other than the Head of School.
3. Have you validated the housing stipend program with the Big Sky Community Housing Trust?
 - a. We have discussed ideas for housing with the previous head of the BSCHT and we are willing to discuss the housing stipend program with the new head of the BSCHT.
4. What are the qualifiers for amounts? Will they be required to live in Big Sky?
 - a. The funds are to help cover the costs for staff to work in Big Sky regardless of where in the Gallatin Valley they live. The fact there is little to no affordable, long-term rental housing in Big Sky currently makes it next to impossible for teachers to live in town. So, the stipend is to help cover a portion of their housing within Gallatin County so that they can free up other funds that are necessary for them to continue to work in Big Sky.
 - b. While we also gave salary increases, this stipend is targeted specifically for housing and is not reflected in our salary schedule. It will be given in equal amounts to all staff, other than the Head of School and not dependent on their salary or position.
5. Does the Big Sky School District currently provide a similar stipend to their teachers?
 - a. No, but they do have the homes that were built in conjunction with Habitat for Humanity, which relied on volunteer labor, donations of many materials and were able to be built on property the school owned. We do not have the deep pockets of the school district. The BSSD has also requested for more housing to be constructed. We would love to provide housing opportunities for staff if they were available.

Project Name: Early Childhood Community Playground

Project Questions:

1. Do playgrounds fall under the master parks and trails plan?
 - a. No, they are on private property, but are utilized by the neighborhood and tourists outside of school hours.
2. Provide an update on the donated mulch outlined in the project budget.
 - a. Each year a local company has provided/donated the mulch that is used for our playground. We have contacted him about the donation and are still waiting to hear back. The funding (\$1,500) requested is to cover the cost, should he choose not to donate the mulch. If it is donated, then the funding would not be used and returned to Resort Tax.

3. As your building recently sold, would this equipment be able to move if you left your current location?
 - a. The equipment is able to be moved. It is similar to the same type of structures that are used at Lone Mountain Ranch. The reason that we have asked for such a small amount is we are anticipating moving to a new campus and do not want to have anything that is permanent if/when we relocate.
4. Have you reached out to MLC regarding their playground items that were purchased as part of a capital campaign several years ago - as I recall their products had a much longer lifespan than what you are showing for yours?
 - a. We did not, as their items were targeted to be more permanent. BSDA's Head of School has put in various playgrounds in his previous positions in both the public and private school sectors. The school realizes that we will most likely be relocating. So, we want something that is able to be moved/transported should it be required.



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky Fire Department

Sponsor Questions:

1. Please provide the names of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: [Greg Megaard](#), [Seth Barker](#), [Dustin Tetrault](#)
 - b. June 9: [Greg Megaard](#), [Seth Barker](#), [Dustin Tetrault](#)
2. Does your organization seek funding from sources outside of the BSRAD boundary?

We are not sure what you are referring to when you say “seek” funding. If you are referring to other revenue streams the answer is yes. We collect close to \$1 million between ambulance transports and wildfire deployment revenue each year. If you are referring to grant funds, the answer is yes. We prolifically seek grant funds and have been awarded over \$1 million in state and federal grants in the last five years.
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?

We are focused on investing in our employees to offset cost of living increases by consistent wage increases of 3-4% to parallel yearly COLA. Obviously, this year has seen record inflation rates that nobody could have forecasted. We also pay for our employees’ health insurance as well as supplemental accident and disability for them and their families to keep more money in their paychecks to provide for their families. Our employees are our number one asset. We are not profit driven and take pride in one of the most competitive wages in the state. We also lifted the residency requirement so that employees could live in Gallatin and Madison Counties to further provide relief from the economic constraints and unaffordability being seen in Big Sky. We feel like because of this we have been able to attract new employees (almost 80 applicants last year) and boast almost no turnover other than retirements in the last 5 years.

4. Please explain why your FY23 request was 206% over what you projected on the FY22 application.

Our internal Capital Purchasing plan is a dynamic document that is not set in stone. We pivot and make changes as the current need or economic climate dictates. This will at times change what our forecasted ask will be from year to year. This specific occasion, the 205% increase you refer to was due to the Training Facility being bumped up as this year’s capital project. The training facility was slated for FY 24-25, but because BSFD aggressively seeks out grant funding, we were able to obtain grant funding to cover the FY23-24 heart monitor (Life Pak 15s) capital project. We also decided during strategic planning meetings to push back the FY23-24 water tender purchase until we have space to store it. These factors pushed the fire training facility up to this year’s project. By doing this we were able to reduce our Capital request by \$540,000 last year and will be reducing the request by at \$500,00-\$600,000 next year.
5. What decision making process do you use to seek Resort Tax vs a Mill Levy?

With the sustained growth and increase in property taxes, the residents of Big Sky do not deserve an increase in their property taxes via BSFD mill increases to continue to fund a fire

department that exists in its current size and operational capacity because of visitors and tourism. An average of 70% of calls are non-resident visitors. This is one of the few areas where BSRAD can provide funding to BSFD in order to provide direct property tax relief to the residents.

6. How do you balance placing excess funds into capital reserves with your request for Resort Tax funding?

- a. Please explain outlined goal of \$7,500,000 for reserves.

Answer to both 6 & 6a: This number is the anticipated cost to construct the future relocation of Station 1. For us to be able to construct such a project without going to the taxpayers for bonds or mill increases we have opted to have an aggressive capital savings campaign to build the future station with our capital reserves. We feel saving for this project is necessary and should not be held against us for being fiscally responsible year after year, adding to our reserves when we apply for BSRAD funding for other capital projects so that we can continue to save for the future station.

7. Provide an update on the Big Sky evacuation plan.

Madison and Gallatin County Emergency Management and Sheriff's Office were tasked with this by the BSRAD Committee. We have been involved in their efforts but have provided feedback on the final "1-pager" product they drafted. We are not sure if they have presented it to BSRAD yet or when they plan to do so. Our other more local evacuation planning efforts are much more in-depth and involve a large-scale multi-year effort in coordination with various other community organizations and assisted with grant funding for contracted expertise that we applied for and were awarded. This funding is to create a more detailed model and plan as well as devise more targeted messaging and education to engage our community demographic.

8. What did the ~\$1.1m in COVID-19 relief go towards?

- a. Other Gov't entities refunded BSRAD for any COVID funding received, has BSFD done this?

We put this money into our reserves to be utilized for future capital projects. Also we did not request any additional assistance from BSRAD for supplies etc during the pandemic.

9. What year do you plan to begin construction on the future station 1 relocation?

Currently, it is estimated to be in 2032–2033-time frame but is susceptible to change based on construction costs at that time.

10. What is the biggest post pandemic impact on community health & safety?

One of the biggest impacts has been the increase in tourism to Big Sky. Once the "lockdown" was lifted, visitors showed up in droves and we saw record call volumes. With the record numbers, among our residents, we saw a lot of mental and behavioral health issues in the community. The pandemic compounded with the drastic cost of living increase has created a lot of financial uncertainty among the non-wealthy residents in the area which has led people to move away to be able to afford a better life or to try to work as much as possible to afford to live here causing a vicious cycle that in many cases is coped with through substance abuse or causes mental disorders. Meanwhile, we continue to grow our commercial economy to meet the demand of the tourists and part time residents without the local workforce to operate the establishments and lack the public infrastructure to support it making it unsustainable for the future.

11. On the LOI you listed \$164,000 as your “FY24 Predicted Request” and \$925,000 as your “FY25 Predicted Request When cross referenced with project data the total projected amounts come to \$239,000 in FY24 and \$1,005,000 in FY25.
- Please explain the discrepancy in predicted requests for both FY24 & FY25
 - Please clarify the organizations predicted requests for both FY24 & FY25
I think we forgot to factor the ongoing wildfire detection cameras subscription costs into the amounts in question.
12. How, if any, is the significant growth in property taxes impacting your projected income?
The short answer is it is going up but not as much as one would think because the legislature caps our tax growth to half the last 3 years’ average inflation. As the value of a mill goes up, the number of mills that can be levied goes down.
- If there is a variance, what percentage variance is the collected taxes versus projected in FY22 and what do you expect for FY23?
While we wait for the DOR valuations, we conduct budget preparations for the upcoming fiscal year. There is always uncertainty when it comes to our budgets tax revenue forecasting, and what we include in our BSRAD application is our forecasted tax revenue which is typically based upon a conservative percentage estimate and not the actual calculation that comes in later in the year. We have seen this number all over the board in recent years and we have simply put excess unplanned tax revenues into capital reserves for upcoming large capital projects.
13. Your sponsor financial page is \$1,059,448 short of what you have posted your audited financials as on your website. Please explain.
Can you elaborate on where the shortage is at? Is it revenue, expense, EOY profit?? The audited financials do not include accruals from previous FY’s but we include them in our overall budgeting so there may be some discrepancies there.

Project Name: Replacement of Self-Contained Breathing Apparatus

Project Questions:

- The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
Initiative P4 Provide support for the FD and Sheriff’s Office.
- Please provide metrics for the goals listed on the application.
 - Improve firefighter safety with new NFPA compliant SCBA's and a cache of spare bottles to operate more effectively.
The metric is to purchase and outfit all BSFD staff with non-expired, NFPA compliant breathing apparatus within the funding cycle. There is no objective metric to measure this goal unless you have an incident with a non-compliant SCBA vs what the effect would have been if they had a compliant system.
- I understand you have a very detailed capital improvement plan. Was this piece of equipment planned for in your capital improvement plan and therefore included in your projected request that you provided last year FY22? Yes, this has been on the 20-year Capital Improvement plan and was identified as this year’s capital request.
- Are there any available matching funds from the state or federal government (or other sources)? If yes, please explain why you do not have the matching funds?

There aren't any state or federal funds available for SCBA replacements outside of the highly competitive FEMA AFG grants. FEMA AFG grants also are not a good choice as they prioritize fire apparatus and PPE for underserved low-income volunteer departments. There may be some private funds available but not to the amount of our replacement costs.

Project Name: Fire Training Facility

Project Questions:

1. What is the expected lifespan for the deliverables provided on the application?
 - a. Deliverable 1: Construct an in-district fire training facility on future station 1 relocation site
The lifespan for the project deliverables would only be relevant for deliverable 1, the training facility. The training facility lifespan would be 50 years and the other phases of the site would also be approximately 50 years from the time they are built.
 - b.
 - c. Deliverable 2: Conduct in-district live-fire, high angle, and technical rescue for current staff and mutual aid partners
NA
 - d. Deliverable 3: Conduct yearly recruit academy in-district at the new facility (dependent upon construction timeline)
We have partnered with other Gallatin Fire Departments to offer a joint recruit academy for new hires. Our facility could potentially host the joint academy in years to come or host certain portions of the joint academy.
 - e. Deliverable 4: Begins phase 1 of the future station site plan (Phase 1: Training Facility, Phase 2: Storage Facility, Phase 3: Station Construction)
NA
2. Please provide metrics for the goals listed on the application.
 - a. Complete BSFD Master Plan project recommendation (pg. 117)

The metric would be to complete the training facility and put it into service.

- b. Reduce out of district training that requires taking staff out of response district (Belgrade)
The metric would be to track yearly training conducted in district and to compare it to past years out of district training costs. Currently the out of district training is conducted with members off shift and tracked as "training overtime" in our current budget. With an in-district facility, we could train our members while on shift in live fire scenarios thus reducing the amount of overtime.
- c. Create a state-of-the-art training facility for Big Sky public safety partners and neighboring organizations to train
NA
- d. Build training facility as a component of the phased site plan and infrastructure needs for the future station 1 relocation site
NA

- e. Build in-district training facility to improve training capacity to increase Insurance Rating per current ISO report scoring (available on BSFD website)
The metric for this deliverable would be easily observed by quantitative scoring comparisons on our next ISO assessment (2027). The ISO reports have detailed scoring matrixes and were most recently assessed in 2022. We would be able to compare ISO scoring upon the reassessment. The reduced score could potentially reduce insurance premiums across the district.
3. Where do you currently hold your training? Where have you held your training over the past 5 years?
We currently hold live fire training at the Belgrade site. We only send staff over off of shift and pay overtime and fuel. There are also other costs associated with out of district training such as the wear and tear on our apparatus from traveling to Belgrade and the chance of having an incident in district where we would need the apparatus back in district ASAP.
 - a. Our understanding is that the current facility is in Belgrade. What approximate percentage of BSFD employees live in Gateway, Bozeman, or Belgrade?
Approximately 60% of the staff lives outside of Big Sky but not all “non-residents” live in the Bozeman area. Traveling from their homes to a closer Belgrade training center is irrelevant. The issue is the overtime costs associated with training out of district for staff.
 - b. Would this training facility be different than the facility that Central Valley Fire District recently constructed?
It would be similar to other facilities across the state with minor differences in order to facilitate site and zoning requirements.
 4. What are the benefits to an in-district training facility?
Better trained staff, more realistic scenarios, lower overtime costs, decrease ISO rating, and provide a place for BS public safety partners to train.
 5. How many Fire Districts are in Montana? How many of these have a dedicated in-district fire training facility?
To provide an accurate answer to this question would take a long time to obtain due to the size of the state and number of departments. Of the 10 fire departments in the state that are career, full-time organizations we are one of two or three without a dedicated in-district training facility.
 6. Where will this new be facility located? Big Sky Fire Department invested \$500,000 to purchase 3 acres off Lone Mountain Trail for the future development. This is where the training facility would be built along with the apparatus storage and main fire station.
 7. Did you seek partners for this project?
 - a. Is there an opportunity to share with any other fire districts to help make this more affordable? Have you looked into this? If no, please explain.
Due to our proximity to other fire districts, it was not feasible for us to “share” the costs of an in-district facility. This also creates issues in numerous other areas such as ownership, insurance, maintenance, and takes away from value of the capital investment.

8. Your application notes that you will not be requesting Resort Tax funds to cover operating costs of the facility. Please provide the annual dollar amount of what you anticipate the maintenance and operations costs to be. How do you plan to cover these costs?
Ongoing costs will be covered out of BSFD general funds much like our other stations. All building operation and maintenance costs will have its own budgeted expense line item. These costs include all of the utilities, maintenance, and operations.
9. Please explain why this project Impact Area is listed as Programming rather than Capital.
We are not sure where you reference this: In the application under Project 2, this project is listed as "Capital". In the project budget spreadsheet, the amounts are listed in the tables under programming & capital with a projected funding breakout among the line details.
10. This request was not in your projected request FY22. What is different now from last year that is requiring a training facility of this level?
Our internal Capital Purchasing plan is a dynamic document that is not set in stone. We pivot and make changes as the current need or economic climate dictates. This will at times change what our forecasted ask will be from year to year. This specific occasion, the 205% increase you refer to was due to the Training Facility being bumped up as this year's capital project. The training facility was slated for FY 24-25, but because BSFD aggressively seeks out grant funding, we were able to obtain grant funding to cover the FY23-24 heart monitor capital project. We also decided during strategic planning meetings to push back the FY23-24 water tender purchase until we have space to store it. These factors pushed the fire training facility up to this year's project.
11. What activity is involved in a training facility?
The facility would host all types of fire training, technical rescue, and medical scenarios. The facility could also be used for community fire education events, law enforcement trainings, and SAR training. Currently, we partner with many building owners throughout the district to conduct training during the off season or closures, but we do not have the ability to conduct any sort of live fire scenarios to provide realistic environments that we work in.
12. Can you please provide the Master plan project document you reference and note where the training facility is mentioned?
Pg 117
<https://272cn01h0qlz3i3ya43z4j92-wpengine.netdna-ssl.com/wp-content/uploads/2019/09/2019-Big-Sky-Master-Plan-Update-Report-Final.pdf>
13. Please provide the survey results mentioned in the project application.
Deputy Chief Barker has the results and has been on vacation during the questioning period.
14. Is there any grant or private philanthropy funding that can be used for this project?
Training facility grants are very hard to come by. Some FEMA funds have been used for state or regional centers but typically do not fund district facilities.
15. Have you discussed at all with the County as you will need to apply for a zoning variance? If no, don't you think you should see if this is even feasible with them before you ask for funding?
Yes, we have already had these discussions with Gallatin County regarding zoning and the property is classified in the RC-SF-5 classification and Type III essential services buildings are permitted under conditional use permitting (CUP) and will require BSFD to submit a CUP to the county which they support the project.

16. Can other fire departments, including YC, use it for training? Absolutely we would offer this facility to be used by any fire department in Montana.

Project Name: Wildfire Detection Cameras

Project Questions:

1. How is the additional camera on Cinnamon Mountain being funded? The additional camera on Cinnamon will not be ready for implementation in the upcoming fiscal year due to Forest Service permitting and infrastructure upgrade timelines. We will be reducing the amount to \$40k to pay for the current Lone Peak camera subscription cost.
2. The way the application is worded it seems as if the ongoing costs for the operation of the Wildfire Detection Cameras was covered by private and BSFD funds. Please verify. The project is the cost for the yearly camera subscription and will be an ongoing yearly ask of BSRAD to increase the safety of the community. The initial pilot funding was a cooperative between LMLC, Big Sky Resort, and BSFD.
3. BSRAD is moving towards growing their Capital Investments. Are there Capital investment costs associated with the new installation on Cinnamon and/or future camera sites? This project is not a capital investment. It pays for the subscription cost for the cameras. The project does protect numerous capital investments and the community as a whole.
4. Ongoing requests are intended for the interlocal arrangement. Why was this ongoing operational expense not flagged for addition during your annual interlocal update? The is a separate project and has nothing to do with our operational costs that are covered by interlocal agreement.
5. Have you looked into any state or federal matching grants for this project? If no, why? If yes, explain. This project is so cutting edge that there are currently no federal matching grants that cover the scope of the technology. There are future funding opportunities identified in the infrastructure bill for wildfire detection devices in 2023. This funding is still at the federal level and has not been finalized but we already have completed a RFP for when the money makes it to state funding applications.
6. What is the cost share arrangement with the USFS? Due to permitting of the use and the adding of solar power supply, the Forest Service did not feel that the Cinnamon site would be ready for the 2022 fire season, so we are opting to pull the ask for the second camera (\$30K). We will focus on 2023 to incorporate the Cinnamon camera and site upgrades with the Forest Service and seek either BSRAD or federal funding if available.



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky Owners Association

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Suzan Scott, Kenny Holtz, Tammy Estensen, Jeff Dunn/Mace Mangold
 - b. June 9: Suzan Scott, Kenny Holtz, Tammy Estensen, Jeff Dunn/Mace Mangold
2. Does your organization seek funding from sources outside of the BSRAD boundary? Yes. The Big Sky Owners Association (BSOA) has been awarded \$42,000 in grant funding from the MT FWP's Community Ponds Program. Additionally, the BSOA will be applying for grant funding from MT FWP's Future Fisheries Program in November of 2022, a program that previously awarded funding to the Project. BSOA will also be evaluating and seeking all additional grant funding opportunities outside the District that are applicable to the Project.
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? BSOA purchased a condo unit last year for the sole purpose of its employee housing, and consistently monitors and attempts to address local cost of living increases as it relates to their employees. BSOA supports affordable housing, as evidenced by Meadowview Subdivision, which was one of the first and is currently the largest affordable housing subdivisions in the Big Sky community. This Subdivision is within BSOA jurisdiction and was reviewed and approved by BSOA's Architectural Review Committee, BSAC.
4. What is the "Other" public funding listed on the Sponsor Efficiency Worksheet? Madison County reimburses BSOA for winter road maintenance for a portion of Madison County roads. On behalf of the County Commission, the BSOA negotiates and administers snowplowing contracts for these roads, as well as manages complaints and resolves issues. The amount listed under "Other" is the amount reimbursed.
5. What plans do you have to bring your administrative costs percentage down? The BSOA charges minimal annual fees for the depth of quality services provided. The administrative costs percentage is modest for the numerous public and membership services the association is responsible for. Over the last decade, the BSOA has been efficient with their resources and has just recently increased their annual assessment, once in the last 11 years (currently at \$400 per year), yet has provided increased quality public services to keep up with our growing community and membership.

Project Name: Little Coyote Pond and West Fork River Restoration

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain. The Project itself is primarily for the Recreation and Conservation of the Big Sky

community. It will provide opportunities for other local organizations to host educational programming, such as BSCO's fishing camp for youth.

2. Is there a local NPO that you could partner with on this to receive funding? In 2022, BSOA created a 501c3 for the purpose of raising additional funds for a variety of community projects and programs, including this Project. We are in negotiations with GRTF to provide volunteer help for the revegetation of the streambanks restoration as proposed in the Project. As the Project progresses, BSOA will continue to work with other NPOs for additional funding opportunities.
3. What is Benefit Big Sky and its mission? Benefit Big Sky was organized exclusively for charitable purposes to support initiatives in the Big Sky Community that benefit recreation, education, arts, environment, safety, public works, and infrastructure within a reasonable cost, and for any other lawful purpose under Montana State Law.
 - a. Why did you request funds through BSOA vs Benefit Big Sky? BSOA owns the properties within the Project scope and must hold these properties in perpetuity, per the Conveyance Agreement as set forth in 1991.
4. How will you fund the maintenance of these facilities moving forward? As stated in the application, the Project was designed so annual maintenance would be minimal. BSOA has set aside a reserve account for the continued maintenance of the Project area. Over the long term, BSOA is committed to replenish our Pond Maintenance reserve account as needed, through fundraising and assessments.
5. This land is owned by the BSOA and is for the enjoyment of its members. How do you intend to ensure it is available to anyone in the community and/or visitors considering they would not be BSOA members? I am guessing there would need to be some type of easement or irrevocable agreement to ensure that anyone would have access to this area due to its current ownership. Although the properties are owned by the BSOA, the Agreement of Conveyance of Recreational Properties and Easements dated March 15, 1991, grants and declares the property "for the benefit of the Buyer and of the public, forever, a recreational easement." For over 30 years, since the transfer of ownership, the BSOA has made all of its open-space properties, totaling nearly 100 acres within the Big Sky community, available to the entire community, the BSOA membership and visitors, without limiting access. More specifically, both the BSOA's Little Coyote and Silverbow Ponds, for the last 3 decades, have been well known as kids' fishing and recreational ponds, again, for the public, community and BSOA membership to enjoy. The Conveyance of Agreement, as noted, is available upon request.
 - a. What would your response be when asked the question "why did the BSOA pond project get Resort Tax funding when other HOA sponsored projects have not?" The BSOA was first established in 1971 as a pseudo-municipality to serve the entire Big Sky community. Today, as a master association, that intent still applies, where services provided often affect the community at large and not only our membership or a single subdivision as is a traditional HOA. It is important to recognize that the Pond Project and all BSOA open space are for use of the public, community and BSOA membership alike, as noted in the Conveyance of Agreement. Therefore, if the Restored Pond and West Fork is available to the entire community and all visitors, a portion of its restorations should be covered by visitors and the community and thereby, Resort Tax dollars.

6. Is your membership in favor of this idea? If so, please provide supporting data. A survey was conducted in 2020 that asked members specifically, if they favor or oppose the BSOA Ponds and Stream Restoration Project. Over 77% of our membership is in favor of the Project, only 6.5% opposed. The survey results were made public and published on the website. The Project has been presented and supported by the membership at two BSOA Annual Meetings, and updates are given in our newsletter on an ongoing basis with the majority of responses being positive.
7. Is the water quality safe to make it a swimmable pond? Little Coyote Pond is fed by the West Fork Gallatin River in which the Montana Department of Environmental Quality has identified impairments to aquatic life and recreation beneficial uses due to sediment, nutrients and nuisance algae growth. Our project vastly improves sediment transport by reconstructing a channel around the pond. Thus, only minimal sediment is expected to enter the pond and is not expected to negatively impact the Pond's water quality and swimmers within the Pond. To address the issue of algae growth, there will be an irrigation inlet and outlet, so the pond will be regularly refreshed with flowing water from the West Fork.
8. Will putting in a beach and encouraging swimming deter wildlife and affect fish due to size and depth of pond? The pond is designed with sufficient depth to provide for overwinter survival of fish. Swimming isn't expected to impact the pond's fishery.
9. Has GRTF put their "stamp of approval" on this project? After initial discussions, GRTF is generally supportive of the project, as they acknowledge the Project improves the West Fork's waters. However, GRTF's concerns are in regard to the impairment of the existing West Fork's waters, any impacts of people who will be recreating in the Project area, and if there would be any downstream effects as a result of the restored stream that additional proposed modeling may negate. We are in ongoing discussions with the GRTF to address the aforementioned concerns and how we can work together for the improvement of the West Fork River.

As noted in our partner letter to GRTF for their BSRAD application, we strongly support the GRTF's West Fork Nutrient Reduction project for the Chapel Spring located in Meadow Village that will reduce nutrient concentrations and provide cleaner water to the West Fork and Little Coyote Pond.

In addition, we look forward to partnering with the GRTF to collect the willows for the BSOA Project's restored streambanks.

10. What funds has Big Sky Resort put toward the project if it is set to enhance their golf course irrigation operation? If none, why? As noted in the 2017 DNRC determination, the Project "allows the [Big Sky Water & Sewer District] to administer their surface water rights more effectively and to regulate their diversions more closely" and may include the irrigation of the golf course. The inclusion of Big Sky Resort in the Project application was for the dredge disposal and not focused on enhancing golf course irrigation. BSOA is negotiating with Big Sky Resort to allow for the dewatering and disposal of the pond dredge/silt on their property. This consideration would save the Project significant dollars in hauling costs if another location, further distanced from the Pond, was required. However, BSOA has been pursuing additional options for the disposal of this sediment which may be more financially beneficial to the Project. The BSOA expects to have a more defined plan once a contractor is chosen.

11. When was the last time the pond was dredged? 1992
12. Has DEQ seen the project and given any sort of ok to the general concept? DEQ Staff from the Nonpoint Source Management section have been given an overview of the project and verbally expressed support. Once a contractor has been determined, a DEQ permit will be secured before Project construction begins.
13. Has BSOA researched federal or state funding for your pond rehab? We have secured funds from MT FWP and continue to look into possible funding options outside of the Big Sky area, including federal and state funding opportunities.
14. Can you please send us the latest design? Attached is the current Project design. Construction documents in their entirety can be viewed on our website at <https://www.bigskymt.org/pond-rpf.html>.
15. Have the environmental permits been secured? i.e. 404, 310, etc. The 310 and 318 permits have been secured; the applications for the 404, 401 and Floodplain permits have been submitted.
16. Do you have bids on the project? Bids are due from contractors end of day on June 2. They will then be vetted and reviewed by our engineering partners WGM and the BSOA Pond Project Subcommittee. BSOA will not be able to share information by the time of the Application Review Meetings.
 - a. If not, what is the plan if bids come in over budget or if there are cost overruns? We will work to negotiate the most viable options for the Project. If the bids come in greater than the expected, BSOA has identified options to be able to continue with the Project, including more aggressive fundraising through Benefit Big Sky and via increases to our membership dues or through special assessment, pending Board approval.
17. Is this open to all the public? As noted above, the Agreement of Conveyance declares all BSOA Open Space, including the Project area and Little Coyote Pond, to be open and accessible to the public.

BIG SKY OWNERS ASSOCIATION WEST FORK GALLATIN RIVER RESTORATION AND LITTLE COYOTE POND ENHANCEMENT BIG SKY, MONTANA

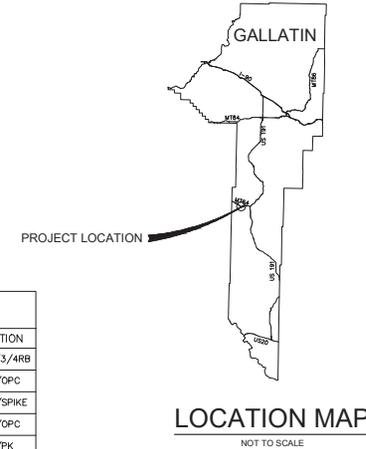


BID SET
PLOTTED: 4/28/22
SAVED: 4/27/22



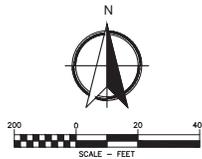
PROJECT OVERVIEW

| △ CONTROL POINTS LIST | | | | | |
|-----------------------|-----------|------------|-----------|----------------|--|
| POINT NUMBER | NORTHING | EASTING | ELEVATION | DESCRIPTION | |
| 1 | 377446.91 | 1507273.39 | 6183.83 | WGM#1 CP/3/4RB | |
| 2 | 376761.83 | 1507132.18 | 6187.94 | WGM#2 CP/CP | |
| 3 | 376779.05 | 1507233.24 | 6185.17 | WGM#5 CP/SPIKE | |
| 4 | 376047.08 | 1505261.71 | 6228.05 | WGM#3 CP/CP | |
| 5 | 375683.83 | 1505352.04 | 6239.07 | WGM#4 CP/PK | |



SHEET INDEX

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| 3 | SUMMARY OF CONSTRUCTION QUANTITIES | 30 | REVEGETATION OVERVIEW |
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| 24 | CIVIL DETAILS - FABRIC ENCAPSULATED SOIL LIFTS | | |
| 25 | CIVIL DETAILS - CONSTRUCTED FLOODPLAIN & PALS | | |
| 26 | CIVIL DETAILS - POND INLET DIVERSION | | |
| 27 | CIVIL DETAILS - OUTLET STRUCTURE AND BERM | | |



PROJECT PERSONNEL:

PROJECT MANAGER: MACE MANGOLD, PE
DESIGN ENGINEER: HUNTER MORRILL, PE
WATER RESOURCE SPECIALIST: JEFF DUNN

811
Know what's below.
Call before you dig.

CALL 2-BUSINESS DAYS IN ADVANCE BEFORE YOU DIG, GRADE, OR EXCAVATE FOR THE MARKING OF UNDERGROUND MEMBER UTILITIES.

WGM GROUP, INC. ASSUMES NO RESPONSIBILITY FOR EXISTING UTILITY LOCATIONS (HORIZONTAL AND VERTICAL). THE EXISTING UTILITIES SHOWN ON THIS DRAWING HAVE BEEN PLOTTED FROM THE BEST AVAILABLE INFORMATION. IT IS, HOWEVER, THE RESPONSIBILITY OF THE CONTRACTOR TO FIELD VERIFY THE LOCATION OF ALL UTILITIES PRIOR TO THE COMMENCEMENT OF ANY CONSTRUCTION ACTIVITIES.

| REVISIONS: | | |
|------------|-------------|------|
| NO. | DESCRIPTION | DATE |
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| | | |

PROJECT: 21-02-21
LAYOUT: SHT 01
SURVEYED: WGM GROUP
DESIGN: HTM/WMD
DRAFT: DEB
APPROVE: MM
DATE:

APRIL 29, 2022

SHEET 1 OF 34

CIVIL COVER SHEET
WEST FORK RESTORATION AND POND ENHANCEMENT
BIG SKY, MT



WGM GROUP
WWW.WGMGROUP.COM

BID SET

PLOTTED: 4/28/22
SAVED: 4/27/22

**STAGING AREA AND HAUL ROUTES
WEST FORK RESTORATION AND POND ENHANCEMENT
BIG SKY, MONTANA**

REVISIONS:
NO. DESCRIPTION DATE

| NO. | DESCRIPTION | DATE |
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PROJECT: 21-02-21
LAYOUT: SHT 07
SURVEYED: WGM GROUP/LIDAR
DESIGN: HTM/JWB
DRAFT: DEB
APPROVE: MAN
DATE:

APRIL 29, 2022

SHEET **7 OF 34**



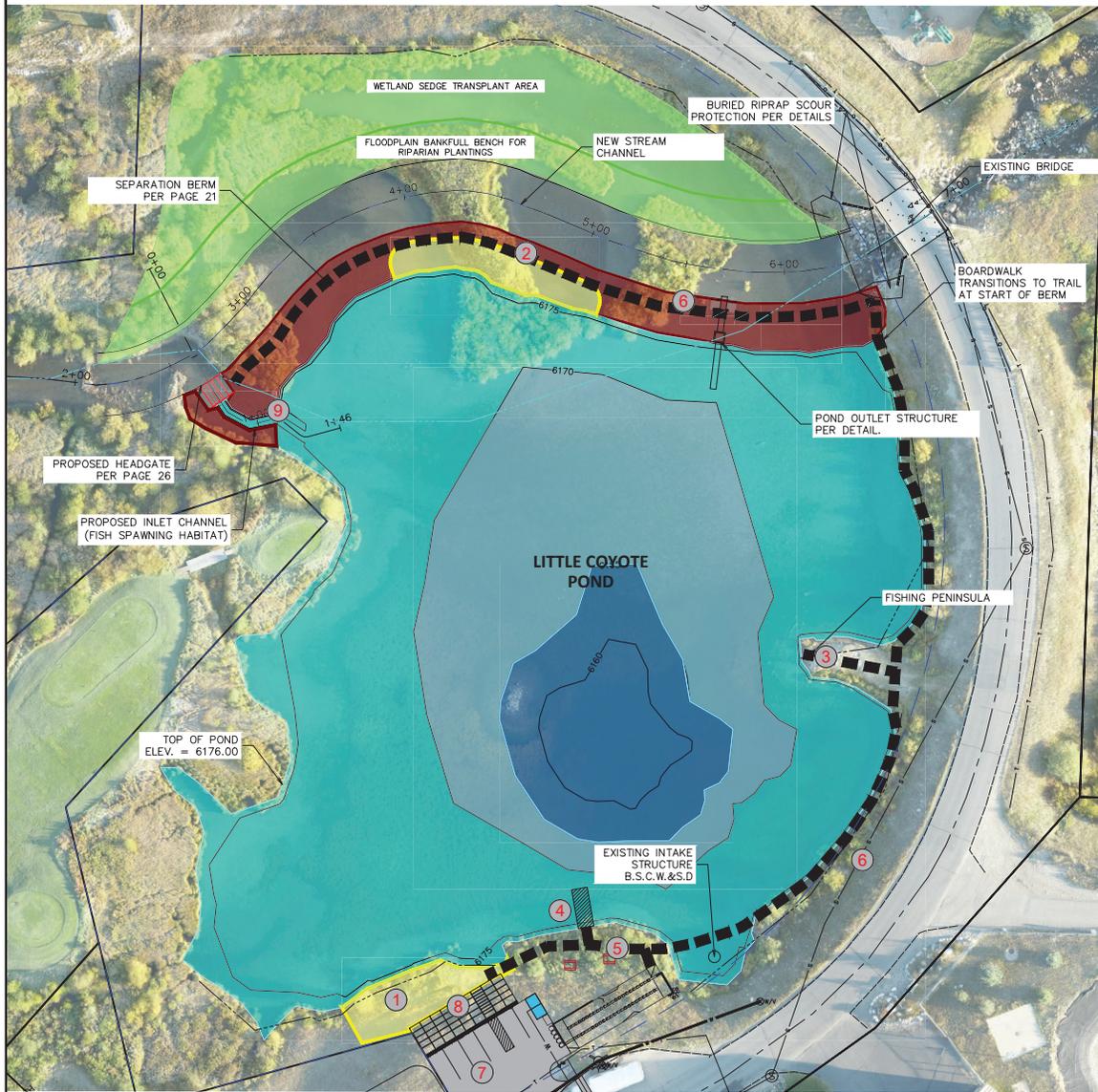


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BID SET

PLOTTED: 4/28/22
SAVED: 4/27/22

**SITE PLAN - LITTLE COYOTE POND
WEST FORK RESTORATION AND POND ENHANCEMENT
BIG SKY, MONTANA**

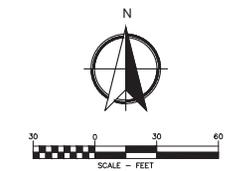


LEGEND-PROPOSED

- EDGE OF ASPHALT
- ASPHALT
- PROPOSED BUILDING
- NEWLY CONSTRUCTED FLOODPLAIN
- ENHANCED FLOODPLAIN
- RECLAIMED DREDGE MATERIAL
- PROPOSED ADA RAMP
- PROPOSED BERM
- CENTERLINE OF STREAM
- CONTOUR (1 FOOT INTERVAL)
- PROPOSED WATER LINE
- PROPOSED SEWER LINE
- EDGE OF BANK
- EDGE OF POND
- HEADGATE
- OUTLET CULVERT
- PROPOSED BOARDWALK/TRAIL ON TOP OF BERM
- RETAINING WALL
- POST ASSISTED LOG STRUCTURE (PALS)

POND AMENITIES NUMBER KEY:

- ① BEACH: SHALLOW ENTRY AND EXTENSION INTO POND
2135 SQUARE FEET SUBSURFACE SAND AREA, 0-3' DEPTH RANGE
1678 SQUARE FEET BEACH CHAIR AREA
- ② BEACH:
3225 SQUARE FEET SUBSURFACE SAND AREA, 0-5' DEPTH RANGE
1742 SQUARE FEET BEACH CHAIR AREA
- ③ FISHING PENINSULA
- ④ FISHING DOCK
(EVALUATE FLOATING VS. PERMANENT STRUCTURE)
- ⑤ PICNIC AREA: ROOM FOR 2 PICNIC TABLES, RESTROOM AND GARBAGE ENCLOSURE
- ⑥ TRAILS
ADA BOARDWALK/TRAIL NETWORK EXTENDING FROM PARKING AREA TO BEACH 1, PICNIC AREA AND FISHING DOCK; FROM BEACH AREA 1 TO FISHING PENINSULA AND BEACH AREA 2.
BENCHES/SITTING AREA - ALONG TRAILS
- ⑦ PARKING
ONE ADA PARKING SPOT PLUS 4-5 OTHERS
- ⑧ ROCK TERRACE
3' FACE ON 4'X6' STONE, WITH 1' OVERLAP
- ⑨ FISH SPANNING CHANNEL



| REVISIONS: | | |
|------------|-------------|------|
| NO. | DESCRIPTION | DATE |
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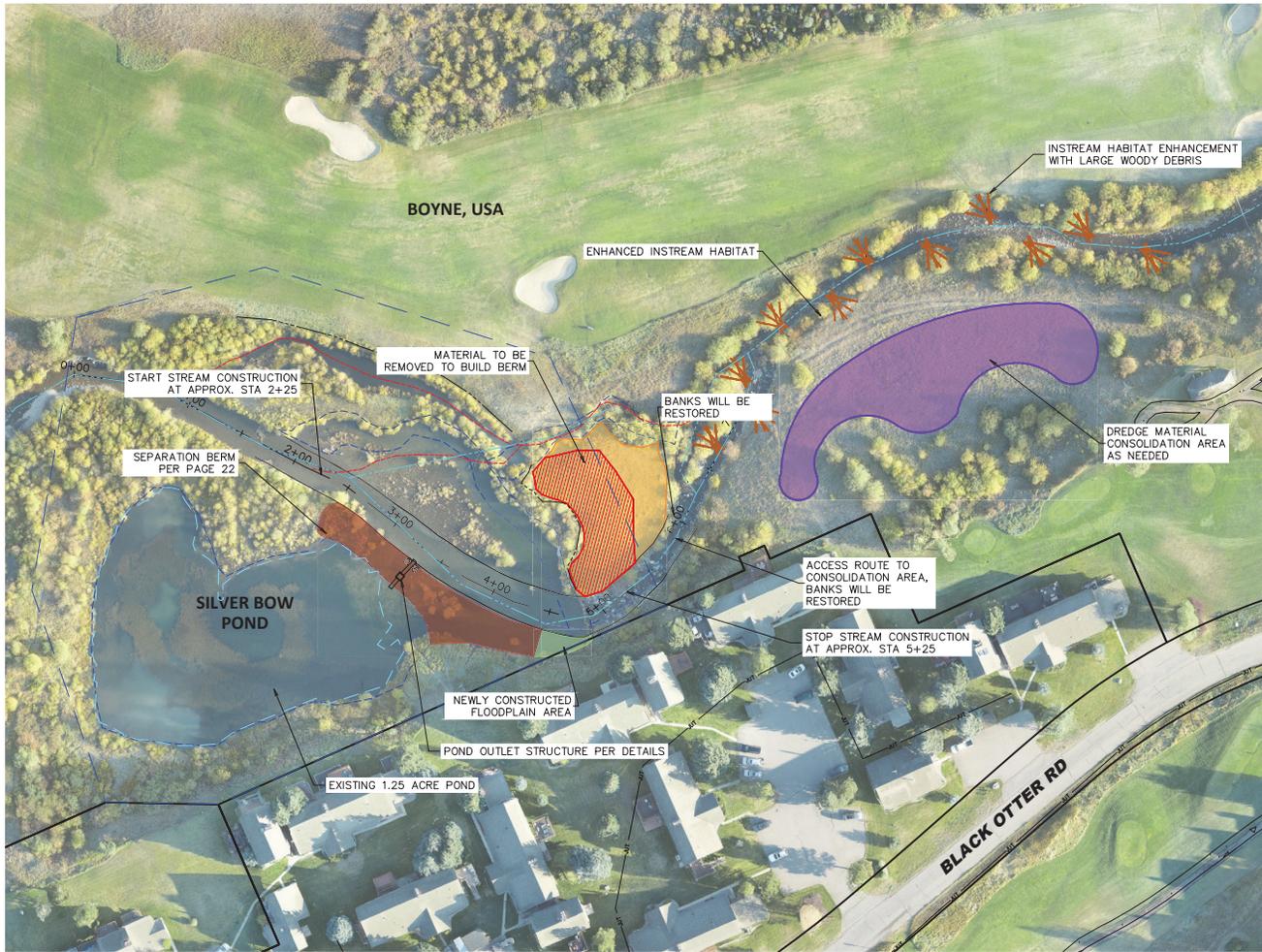
PROJECT: 21-02-21
 LAYOUT: SHT 08
 SURVEYED: WGM GROUP/LIDAR
 DESIGN: HTW/JWB
 DRAFT: DEB
 APPROVE: MAN
 DATE:

APRIL 29, 2022

SHEET 8 OF 34

LEGEND-PROPOSED

-  EDGE OF ASPHALT
-  ASPHALT
-  PROPOSED BUILDING
-  NEWLY CONSTRUCTED FLOODPLAIN
-  ENHANCED FLOODPLAIN
-  RECLAIMED DREDGE MATERIAL
-  PROPOSED ADA RAMP
-  PROPOSED BERM
-  CENTERLINE OF STREAM
-  CONTOUR (1 FOOT INTERVAL)
-  PROPOSED WATER LINE
-  PROPOSED SEWER LINE
-  EDGE OF BANK
-  EDGE OF POND
-  HEADGATE
-  OUTLET CULVERT
-  PROPOSED BOARDWALK/TRAIL ON TOP OF BERM
-  RETAINING WALL
-  POST ASSISTED LOG STRUCTURE (PALS)



BID SET
 PLOTTED: 4/28/22
 SAVED: 4/27/22

SITE PLAN - SILVERBOW POND
WEST FORK RESTORATION AND POND ENHANCEMENT
BIG SKY, MONTANA

| REVISIONS: | | |
|------------|-------------|------|
| NO. | DESCRIPTION | DATE |
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| | | |

PROJECT: 21-02-21
 LAYOUT: SHT 15
 SURVEYED: WGM GROUP/LIDAR
 DESIGN: HTM/WD
 DRAFT: DEB
 APPROVE: MAN
 DATE:

APRIL 29, 2022

SHEET **15 OF 34**



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky School District #72

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Dustin Shipman dshipman@bssd72.org / attending virtually
 - b. June 9: Corky Miller cmiller@bssd72.org
2. Does your organization seek funding from sources outside of the BSRAD boundary? **No, the school district does not generally seek funding outside of the state generated revenue.**
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? **In the most recent contract signed with the teachers' union, all of our employees will receive a Cost Of Living Allowance (COLA) in FY23. COLA is based on their salary, ranging from a 2% COLA and a 10% COLA. Additionally, employees, with the exception of admin will receive a base raise between 4% and 6%.**
4. Why does the School District not have any reserves? **It is against state law for a school district to carry much in the way of reserves. We are allowed, under law, to carry 5% - 10% of our general fund budget. The board can authorize to expend those dollars only within the confines of the law which is related to emergencies, natural disasters or the like.**
5. Do you anticipate a phase 2 of the teacher housing project, if so what year? **Yes, eventually, however we do not have any plans or even preliminary discussions.**
6. Do current community-wide facilities address Big Sky's educational needs? **I don't feel like I can speak to this very competently other than for my own organization. I believe the public school in the community has more than adequate facilities to meet the community's needs.**
7. What gaps exist in childcare and education in Big Sky? **Again, I don't feel like I can answer this with much in the way of empirical data, however the general sense seems to be in the area of day care and the costs of that service in the community.**
8. Have you met with Discovery, Morningstar, the Library, after school program providers, and Camp providers to establish baseline metrics for education and childcare in Big Sky? **No we have not. Namely because the public school, at least for traditional school age children has the square footage and staffing required for that age of student in the community. The Big Sky**

School District, as a public school in the state of Montana has little in common or collaboration with the entities in this question. We are dictated minimum metrics from the state.

- a. If yes, what are the needs for the following
 - i. Square feet of facilities – **For traditional school aged children, there is not a need for any additional square footage in my opinion for traditional aged school children.**
 - ii. Necessary staffing – **By and large, the public school has the necessary staffing.**
9. On the LOI you listed \$1,500,000 as your “FY24 Predicted Request” and \$0 as your “FY25 Predicted Request”. When cross referenced with project data the total projected amounts come to \$1,000,000 in FY24 and \$0 in FY25.
 - a. Please explain the discrepancy in predicted requests for FY24 – **I am not sure why this discrepancy. The LOI indicated \$1.5 mil as a potential capital project that would allow for an expansion of 3 and 4 year old programming.**
 - b. Please clarify the organizations predicted requests for FY24 – **See previous response.**

Project Name: 3 and 4 year old programming

Project Questions:

1. What is the lifespan of the deliverable provided on the application? **Hopefully forever. The only risk is a change in state law that allows for funding for students under traditional enrollment age in exceptional circumstances.**
 - a. Deliverable #1: The Big Sky School District will implement long term programming for Big Sky community children who are not of regular enrollment age for public school.
2. Please clarify the project goals and metrics. Below is what was provided on the application. **Goal is to enroll 20 students, metric measuring success is the enrollment of 20 students.**
 - a. Big Sky School District will enroll twenty 3 and 4 year olds under exceptional circumstances in
3. Is there a classroom dedicated to this program? **yes**
4. How many staff will be needed for this program? **2**
5. How will this program align with existing 3- & 4-year-old programming being offered in Big Sky? **Won't align to a large extent. Will align with programming that we in the school district structure for the continuum of learning from Kindergarten to College.**
6. The dates of the programming match the school year; what programming is offered for these students during the summer? **None. The school district has never had summer programming.**
7. The project application lists a project end date of 6/11/22. Please validate. **I am not sure what project end date means. For this particular funding we will not ask for these costs again. The actual programming will be, again, hopefully infinite.**
8. How is this program different than other programs at the school, in which it needs BSRAD funding vs taxpayer funding? **The state of Montana funds schools based on the previous year enrollment numbers. So, startup costs associated with 20 students in one grouping will not be calculated in our budget until FY24, hence making a \$110,000 startup impossible as 99.9% of our budget based on SY22 enrollment is budgeted for current operations. This is not the same as having an enrollment increase of 20 across the K-12 as those students would be spread across many grade levels.**

9. The payroll and supplies requested in this application for this program would be covered in the future via property taxes, correct? **Not exactly, the payroll and supplies will be paid for in the future through the state allocated dollars for public schools. Education dollars that the state distributes to schools is not property taxes. The education budget for the state is made up, almost exclusively, of income tax dollars collected and passed through to schools via the state funding formula. Property taxes do support the school to a large degree but only minimally in day to day operations.**
10. How many students will you serve in the first year? **20**
11. How are students chosen for the program? **Via board policy which states that students who are 4 years old on or before September 10th of the enrollment year and in descending order of birthdate from there and students who are 3 years or older and identified with a learning disability through the Individuals with Disabilities Education Act.**



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky Skating and Hockey Association

Sponsor Questions:

1. Please provide the names of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: **Ryan Blechta**
 - b. June 9: **Ryan Blechta**

2. Does your organization seek funding from sources outside of the BSRAD boundary?

Yes. We do seek donations from individuals, companies and foundations who live or are based outside the BSRAD boundary (mostly in Bozeman) and we expect to solicit them for repeat donations in the future. We've also sought funding from the State of Montana but that only occurs when we believe we qualify for programs that they have.

3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?

Since we do not have employees, our main challenge is with respect to materials/energy costs and paying the costs for independent contractors needed to maintain and operate our rink. We expect that, because of substantial increases in the cost of living, especially energy costs, the amount of our projected spending shown in our budget and the amount of operating expense assistance we requested from Resort Tax may be too low, possibly forcing us to pull money from our financial reserves. We hope to deal with that several ways: (1) a modest increase in program fees; (2) increased amounts from fundraising activities; and (3) requesting additional amounts from Resort Tax.

4. Please provide an update on the BSCO/BSSHA merger.

Both the BSSHA and BSCO have negotiated the terms of possible merger, and then had their respective boards approve a detailed letter of intent regarding an asset transfer arrangement in which BSCO will acquire the BSSHA's assets and take over its operations. The letter of intent is intended to form the basis for a formal contract. A draft contract was recently drafted by the BSCO's attorney and it was provided to BSSHA a few weeks ago and we are having it reviewed. We hope to respond to the BSCO regarding the contract and any suggested changes no later than June 1. Assuming we mutually agree regarding the final terms, the next step will be to have the agreement approved by both boards. Last, before the merger can take effect, we must provide the Montana Attorney General with notice of the merger along with documentation which includes a copy of the merger agreement and board resolutions of approval. According to Montana statute, no transfer of assets can occur until the earlier of 20 days after notice has been given to the Montana Attorney General or until the Attorney General has waived the notification requirements in writing. This means that a merger will likely take 45-90 days to complete.

5. Please explain why your FY23 request was 50% below what you projected on the FY22 application?

See response to question 6.

- a. Your FY24 and FY25 projections are flat, please explain.

When you say that our FY24 and FY25 projections are "flat", it is unclear to us why you say that. Three of the four projects in our FY22 application were for capital items and those were completed with no additional spending on those projected. We (or the BSCO, if the merger occurs) could be making a new capital request in future years, possibly in the \$40,000 to \$50,000 range for a system which could reduce our energy costs, but we have not done enough research to make such a request. In short, our current application (FY23) only includes a single project asking for money to help us with our operations expense. Our projections for operation expenses in FY23 , FY24 and FY25 are very similar to FY22. That is because our operations and their related expenses are pretty much the same year-to-year and the main change going forward will be cost increases due to inflation. In hindsight, given the unexpectedly high rate of inflation currently, our projections for FY23 were probably way too low and we now believe operations expenses for FY24, and FY25 will be significantly higher to reflect the rate of inflation.

6. Your FY23 request is 50% less than you had projected, what is the difference in your operations that is creating this variance?

None. Although our total request for FY23 (\$38,000) is roughly 50% less than our total request from BSRAD for FY22 (\$78,530), that difference is due primarily to the fact that, in addition to a request for assistance with operating expenses, our FY22 request included three separate requests for assistance with capital expenditures (50% of the cost of new dasher boards, an equipment trailer, and a glycol tank). Our current FY23 request does not include any capital items, only operation expense assistance. If you only compare our requests for operating expense assistance, the amount currently requested (\$38,000) is only slightly greater than the \$34,890 we requested for FY22. The amount requested for FY23 is also within the estimate we made in our FY 22 application for FY23 operating expenses (we projected \$34,000 to \$40,000).

7. What plans do you have to decrease your reliance on BSRAD?

As I'm sure you're aware, between increasing the amount of our private donations and other revenues, we have been asking BSRAD for a smaller and smaller percentage of our operating budget in recent years. Also, most of our capital improvements have been focused on things which could reduce (or reduce growth of) our operating expenses over time. Unfortunately, there are very few ice arenas which cover all of their expenses from revenues and donations and, as a result, most Community ice rinks require some sort of subsidy to exist. We also have deliberately kept our user fees low in order to make them affordable to people who live and work in the Community. Given the affordability problem in Big Sky, which is especially acute for many people who work in the Community, we believe that is a desirable goal. In short, we see that continued help will be needed from BSRAD, but our approach for years has been to make improvements and do other things which we believe will likely reduce future costs as much as possible—even though it will not necessarily eliminate our reliance upon BSRAD. For example, we are currently investigating curtain systems which are supposed to reduce the effect of the sun on the ice and thereby save energy costs. Once we have fully investigated this option, we (or the BSCO, if the merger takes effect) in future years may ask Resort Tax to help with the funding of that improvement. We will also look for other ways to reduce our expenses, and increase our fundraising, with the goal of reducing, but not necessarily eliminating, our reliance upon BSRAD. Otherwise, we anticipate that the amount of our request for operating assistance each year will be roughly the same—adjusted for inflation.

Project Name: BSSHA Operations

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.

Yes. We believe that our project (supporting operations) does create outcomes which help achieve the goals of other Impact Areas, including the following: (1) Arts and Education. As stated in our 501(c)(3) application, part of our mission is to educate the public regarding ice sports. In fact, many of our programs, including youth ice hockey, curling, and broomball do provide instruction to participants. (2) Economic Development. Having a refrigerated Community ice rink with related programs is an asset which makes the Big Sky Community more attractive to tourists, residents and even short-term employees of the Resort. Nearly every ski resort in the West has a refrigerated ice rink and having one in our Community is one element which Big Sky needs to compete for tourist dollars. This is confirmed in letters sent by Community leaders in support of a previous grant proposal to the State of Montana (we can provide copies of those letters at your request). (3) Health and Safety. Our rink and programs provide an inexpensive recreational activity which involves physical exercise, often very strenuous. By providing a desirable, fun option for physical activity, we contribute to the health of members of the Community.

2. Are there any cost savings or additional expenses to your operation now that you are at the new Len Hill Park facility?

Not from the location itself, since we were at the Park for many years before it had that name. The owners of the Park did help us keep our costs low by not charging us rent for use of the Park. Due to certain developments in recent years, however, we have realized additional cost savings from being there—especially because the Park is now owned by the BSCO. For example, we collaborated with the BSCO and provided some financial support in the design and construction of a concrete slab that encased our refrigeration pipes and included infrastructure which enabled us to put in regulation dasher boards and a pressurized glycol tank (through the financial support from BSRAD and other entities). The location also enabled us to utilize storage at the new BASE building. As a result of all these, the BSSHA has realized cost savings from reduced energy costs, less expense to put up and take down our seasonal rink, and reduced storage costs. We also are likely to reduce material and labor costs in the future that could arise from damage to the pipes/loss of glycol, etc.

3. The application listed a Strategy rather than an Initiative outlined in the 2022 [Our Big Sky Update](#). Which Initiative is this project working to achieve?

Helping to pay for the cost of BSSHA's operation supports several initiatives outlined in the 2022 "Our Big Sky Update". First, it supports the initiative to "Provide Accessible & Affordable Behavioral Health & Wellness Opportunities Through Recreation & Programs". Our rink and programs provide an affordable recreational opportunity that create opportunities for Behavioral Health and Wellness. For example, coaching provided to participants in our youth hockey program not only contributes to the physical health of our young people but also helps to instill values in children which, over time, will contribute to behavioral health. This includes the values of hard work, self-discipline and control of emotions, learning to follow rules, and teamwork. Playing team sports can also develop resilience and self-confidence. Second, we believe the rink and programs support the initiative to "Provide Tools for Recruitment and Retention". The BSSHA provides inexpensive recreational opportunities for people who work in Big Sky and their families, making it a more desirable and affordable place to live and work. Third, our project supports the initiative to "Advocate for Businesses and Non-Profits to Partner and Collaborate". Our rink draws people to the Town Center which likely results in increased patronage of businesses there. Our board sponsorship program provides businesses with an opportunity to gain recognition in the Community. Fourth, in a small way, we help the initiative to "manage the visitor experience with clear information". Information useful to visitors regarding our rink and programs is provided through our website, our Facebook listing, and by putting "rack cards" informing visitors in hotel rooms of our rink and its availability. Last, in your update, you also mentioned that one of your concerns is that "Year-round recreational opportunities are limited by access, cost, and availability of athletic playing fields and indoor facilities". The BSSHA rink and its related programs help to address those concerns. Without BSRAD support for our operations, our facilities and programming would not be available to the extent that they are now.

4. What type of increase did you see in participants for your programming?

That is difficult to predict but, in most years, we see an increase of around 10%. Unless the number of full-time residents in Big Sky increases, however, the number of participants, at some point, will eventually not increase.



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky SNO

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Lizzie Peyton, bigskysno@gmail.com; Marne Hayes, marne.hayes@gmail.com
 - b. June 9: Lizzie Peyton, bigskysno@gmail.com; Matt Madsen (GoGallatin) matthew.madsen@montana.edu; Amy Trad (SNO Board Member) amy.trad@bigskyresort.com
2. Does your organization seek funding from sources outside of the BSRAD boundary?
 - a. Yes
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?
 - a. SNO is fortunate to not have the challenge of housing out-of-community employees, but are more than aware of this crisis. We have addressed sustainable livability in our CAP and are working through our action items to include considerations for the challenge of affordability and availability of housing in Big Sky.
4. Please explain why your FY23 request was 2,478% over what you projected on the FY22 application.
 - a. As our organization was in its infancy in 2021, the anticipated financial needs for growth were unknown when applying for BSRAD funding. However, with the onboarding of staff this year, our capacity has increased, as has our scope of work, which is reflected in our FY23 project applications.
5. With a staff of 1-2 people do you feel SNO has the capacity to successfully execute the 5 projects outlined in the LOI?
 - a. Yes. We have given much consideration to this point, and believe that with support and funding through a variety of sources (including BSRAD) we can address our capacity needs. With additional funding for the projects and programs SNO will be able to keep 1-2 employees on in order to see these projects through to their fulfillment.
6. Please explain the purpose of Restricted and Unrestricted Reserves outlined on the Sponsor Efficiency Worksheet.

- a. Restricted reserves are allotted from previous grants so they will be going to fund a specific project or program. Unrestricted reserves are funds that SNO can use without constraint.
- 7. On the LOI you listed \$260,000 as your “FY24 Predicted Request” and \$225,000 as your “FY25 Predicted Request”. When cross referenced with project data the total projected amounts come to \$295,600 in FY24 and \$276,800 in FY25.
 - a. Please explain the discrepancy in predicted requests for both FY24 & FY25.
When submitting the LOI, not enough thorough research had been done on the longer-term needs of the projects and the funding necessary to successfully execute them.
 - b. Please clarify the organization’s predicted requests for both FY24 & FY25.
The projected amounts of \$295,600 & \$276,800 for future fiscal years are predicted at this date, though will become more solidified as those projects are vetted and become more focused based on current work and reasonable expectations for long-term projects..
- 8. What other sources of funding have you explored?
 - a. SNO has focused on EPA grant funding, CEC funding through the NAPECA grant, local foundations, funding through our stewardship program, and support from community investments. We continue to source appropriate grant funding based on our sustainability focus, including grants that focus solely on capacity, those that encourage collaborative partnerships, and sources that are looking to keep ongoing sustainability projects moving.
- 9. What changes are you making to your staffing to increase by approximately \$250k in payroll and benefits, yet only have 1.0FTE differentiation between Previous FY & Current FY?
 - a. With the project budgets and our 2022 budget showing approximately \$120k in payroll, this would successfully cover 1 FTE plus a part time employee. *ASK JENNY WHERE \$250K COMES FROM-OUR BUDGET SHOWS \$128K*

Project Name: Town Center Recycling & Composting

Project Questions:

1. What is the lifespan of the deliverables provided on the application?
 - a. Year round service of Town Center & Community Park compost & recycling bins
 - b. Year end diversion report: weight of each compost & recycling
 - c. Coordination of vendors with TCOA & BSCO for each respective location
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. This project contributes to recycling and composting (awareness and) education, public works as an opportunity to keep our community clean via landfill diversion, health and safety by keeping the local methane emissions down, and has the potential for furthering long-term economic development by contributing towards SNOs efforts to

make Big Sky a sustainable destination where tourists have ample opportunity and education to protect the outdoors they're here to experience to the fullest.

3. Can this program grow to more heavily used sites in the community?
 - a. Yes, our goal is to grow it reflecting community need, awareness of the resource, and interest in expanding our current locations to accommodate a broader community footprint
4. Is there any way this can be combined with other trash removal services we or others pay for in this community?
 - a. We have not pursued a partnership with garbage removal at this time. Other trash removal services focus solely on items going to the landfill, and not those diverted to recycling and composting. Our goal is to keep as much waste as possible out of the landfill through compost and recycling services, but understand that partnership projects are important to consider, and we would be happy to look at options to streamline community waste removal services with other interested commercial or homeowner associations (we have helped coordinate the recycling consortium with BSOA & Republic for curbside service).
5. Are either of these entities that you pay for this service recycling outside of the bins you have provided?
 - a. Yes. YES Compost collects from commercial establishments & private households in Big Sky. Full Circle/Four Corners recycling maintains large commercial contracts in Big Sky as well as the Recycling Center.
6. TCOA businesses certainly benefit from the tourism and purchases that would eventually end up in these containers. As for BSOA/BSCO it is within their HOA and on their property so seemingly would be something they would be interested in partnering on.
 - a. Have you reached out to the TCOA, BSOA, or BSCO where the bins are located to ask for any financial contribution to this project?
Not at this time. However we did connect with TCOA at the original outset of the project and at that time they did not have the capacity to engage. It may behoove us all to dialogue on this again at some point in the future.
7. Any # on tons diverted from landfill for this program?
 - a. YES Compost continues to tally throughout the year: at the yard waste composting, we collected 1800 pounds of compost, and at the Town Center & Softball Fields 840 pounds has been recorded. WeRecycleMT has notified that isolating the pick up from these locations is difficult due to the fact that it is integrated with their other Big Sky pickups. We will continue to try to work with them on a way that this can be recorded in the future.

Project Name: Climate Action Plan (CAP) Implementation

Project Questions:

1. What is the lifespan of the deliverables provided on the application?
 - a. CAP implementation paves the way for 28 years of work towards achieving net-zero CO₂ emissions for the Big Sky Area.

- b. **Climate Action Plan (CAP) Document:** This first edition of our CAP document defines four Climate Priority categories; Energy and Buildings, Transportation, Consumption and Waste, and Environmental Health and Resilience. Within these priorities, 13 Target Areas are established with 81 near-term and 40 long-term strategies. It is expected that with new technologies, fluctuating costs, and both positive and negative external influences, the CAP will be updated every five years.
2. Is the CAP the primary document that is guiding the efforts of SNO?
 - a. Yes, it is considered to be our northstar for strategy development.
3. Please provide a status update on the CAP.
 - a. Currently, the CAP is in the final editing and peer review phase. Simultaneously, members of the SNO Board & staff are engaged with a graphic designer to ensure the document clearly conveys our intended vision and implementation details. We anticipate completion and release in late summer.
4. How does the ongoing CAP implementation differ from additional project requests?
 - a. As all of SNO's projects are driven by tenets in the CAP, we chose to separate out constituent projects for clarity and ability to set distinct milestones, goals and deliverables per the BSRAD application. The CAP is the umbrella under which all the other projects and programs fall.
5. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. The CAP will be a holistic approach for the community to collectively reduce CO₂e emissions and improve our resilience. With its inherent connection to several facets of community sustainability / livability, it has great potential to influence every single impact area. Often spurring individuals and businesses to change habits and recognize their role in our long-term net zero goals.
6. The end date of this project is listed at 6/30/23 but the project budget indicates funding requests in FY24 & FY25. What is the anticipated completion date of the implementation?
 - a. Implementation of CAP strategies will be the first phase of this work. The execution of the CAP action items will be continuous and quite active until 2035, and then less so and/or in different capacities until 2050, meeting our long-term goals for emissions reductions.
7. One of your goals states that you plan to establish an organization that will begin to implement the climate action plan projects, is that different than SNO? If so, how, and why?
 - a. It is not different than SNO. We are referring to the volunteer working groups of community stakeholders who are experts in their area of interest and dedicated to implementing specific projects and carrying out the areas identified by the CAP as most significant to achieving outlined sustainability goals.
8. How will you measure if these investments are successful?
 - a. In the long term, intermittent future greenhouse gas emissions will be studied and inventories created to directly compare to our 2018 and 2019 baseline emissions. In the short term, the successful implementation of meaningful and targeted projects can also be measured.

9. Can you explain the significant decrease in grants noted in the FY24 and FY25 budgets with significant increases in BSRAD Funding?
 - a. When accounting for budgets in FY24 & FY25 we did not want to over-represent potential funding, with the understanding that as a nascent organization, we were unaware of additional alternative funding that could be sought for projects. The forecast reflects what we intend to ask from BSRAD at this time, however we will continue to research other grant/funding opportunities both inside and outside of Big Sky. Without an organizational history, or pursuit of these large amounts of project and implementation funding, accurate budget projection is a work in progress.

Project Name: Carpool Incentivization Program

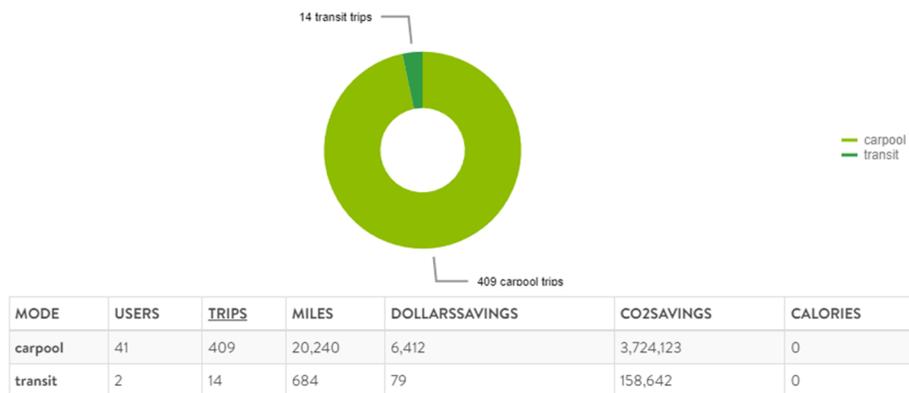
Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. Economic Development - helping workers save money on gas allows for more money to be able to be spent in the local economy. Reducing traffic congestion and travel time is a return on investment for everyone involved. Gift cards from local businesses generally translate into more customer visits as well as money above and beyond the amount of the gift card being spent.
 - b. Health & Safety - Transportation is a health and safety issue, reducing travel times, reducing CO2 emissions, reducing stress associated with travel, increasing social cohesion through groups of people being together in a car, local residents who are able to walk/bike see improvements in overall physical health and well-being.
 - c. Public Works - reducing the number of cars on the road reduces overall impact on transportation infrastructure which helps bring down costs for public works. Planning connected communities on the front end has a large ROI in the long term by providing lots of different options for transportation modalities for all user groups.
2. What are the baselines for the goals and metrics you outlined?
 - a. The baselines are projections from the pilot *Big Sky One Less Car* incentive program combined with growth in other projects that have utilized the GoGallatin platform. In addition, metrics were shaped through conversations with program staff at the Way to Go Missoula office, whose similar program structure helped shape some of our own projections.
3. Are you working with TIGER grants partners and the Transportation District to communicate this program during the next 3 years of construction to ease traffic congestion?
 - a. Short answer: Yes, GoGallatin's office falls under the jurisdiction of the Transportation District and has inherent transparency. Unfortunately, less construction equals less traffic. Often SNO Board Members and GoGallatin staff are present at 64/191 meetings to advocate for multiple creative solutions to the problem at hand and let folks know about what the platform offers. In order for this project to be successful, it will take a collaborative effort amongst employers, employees, community organizations to help

spread the word and encourage usage. This program should not be looked at as the solution to the problem but rather a tool in the toolbox to help work on shifting the culture of single occupancy vehicle drivership that exists within the Gallatin Valley.

4. Have you been working with local employers to help create carpool programs?
 - a. We have been engaged with local employers, but frequently get pushed to the back burner due to the urgency of staffing and housing issues. Despite transportation being a part of the holistic solution, it is not perceived as urgent at this point. We had a successful partnership with Big Sky Resort on a short-term commuter program for resort users during the last month of the season. In mid-May 2022 we had an initial collaborative conversation that included the Yellowstone Club, Spanish Peaks, Moonlight Basin, and Big Sky Resort about helping to manage and operate carpool programs for their respective businesses. Hopefully with increased congestion, traffic will be perceived as an acute challenge and encourage synergy.
5. Are there incentives for people living and working within Big Sky to encourage them to commute car-free?
 - a. This program has the potential to be tailored to the current needs of the community. Having clearly defined goals from the funder and the community are important. The initial pilot program was specifically targeted at commuters from Bozeman to Big Sky as the traffic issue in the canyon was identified as the key issue to be dealt with and the carbon footprint of Canyon commuters far surpasses that of those within the area boundary. The platform can be used for all different incentive and reward programs (including bike/walk/carpool to work) as we establish legitimacy and show success with this initial program, as well as business specific Transportation Demand Management.
6. Is there a community this is modeled after?
 - a. Bozeman has differing incentives and programs spearheaded by GoGallatin from bike to-work-day, the GoGallatin Challenge, MSU Guaranteed Ride Home program, and the 12 days of Bike-mas and other programs to encourage commuters to utilize more sustainable forms of transport.
 - b. Missoula in Motion utilizes the Way to Go Missoula platform to operate a monthly commuter incentive program.
 - c. Literature review by ALTA planning and Design around the effectiveness of different forms of commuter incentive programs is abundant in Washington State and other further afield locales.
7. BSRAD is restricted to funding projects within our geographic boundaries of our District, can you confirm that all these carpool related incentives will be specific to individuals that are driving within our geographic boundaries?
 - a. The program will be marketed to commuters whose trips originate or terminate in the Big Sky Area depending on the goal and scope of the overall program, and will specify to people to only track those trips. In addition, we can look at origin and destinations of logged commuter trips through the platform to ensure compliance with the parameters set forth in the program.
8. How many businesses have participated in your incentive program? I believe you said they offered discounted gift cards to their business.

- a. There were 3 businesses that were a part of the original pilot incentive program offering \$15 gift cards, \$10 of which was funded through a grant generously provided by YCCF. Those included: Hungry Moose Market & Deli, The Big Sky Conoco, and The Coffee Pot Bakery & Cafe (the last of which is in Gallatin Gateway, but is heavily frequented by commuters).
9. How many program participants did you have in the 21/22 fiscal year?
- a. Our only SNO/GoGallatin program thus far was a singular month (March) in 2022. That garnered 71 participants. The total number of people registered on GoGallatin is ~1600. A Bozeman-focused challenge run specifically by GoGallatin (called the GoGallatin Challenge) had 242 participants.
10. Any additional program numbers you can provide about riders, emissions, gallons of gas etc.?
- a. Initial Pilot program (Big Sky One Less Car March 2022)



11. Is GoGallatin an app for users to find carpools or rideshares?
- a. GoGallatin is an online platform for users/commuters to find carpools and rideshares. It utilizes a mobile app called Commute Tracker by RideAmigos and allows users to search for nearby carpools, vanpools, and other transportation options. It is not a Rideshare app like Uber or Lyft. You can partner RideAmigos software with Waze (a carpool based rideshare app) but Waze is currently not active in the Gallatin Valley area.

Project Name: Waste Composition Assessment

Project Questions:

1. What is the lifespan of the deliverables provided on the application?
 - a. Data collection- Actual collection is a one year lifespan until the project Both the data & recommendations report are accessible and applicable indefinitely until a new report is made, which we anticipate will be in 10-20 years as that seems to be a standard for municipalities that collect and utilize this data in a similar fashion.
 - b. Recommendations Report See answer to part (a)
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain. Health & Safety goals will be impacted as this assessment will serve as hyperlocal data for future projects to decrease our carbon & methane emissions, particularly. This type of

assessment would traditionally be done by a municipality so therefore it covers Public Works. Additionally, Economic Development: The study is a building block to increase usage of the diversion industry (whether it's composting, recycling or reuse) so has the potential to positively impact local recycling, composting and thrift store businesses. Community-At-Large Education is the next step following the data and the recommendations report.

3. Is there an end date to this research? Yes, we plan on having our last data collection period be in March of 2023. From there we will compile data from 4 collection periods to produce our recommendations report.
4. How will the findings be used? These findings will shape education and awareness around waste reduction in the future. It will establish if SNO should be educating more towards a specific type of recycling (e.g. cardboard, plastics or aluminum), composting or reuse. By sharing the findings, other recycling educators will be able to use the information to educate their populations.
5. Will this assessment provide an outline for future community capital investments? Not foreseen at this time.
6. Can you please provide me some examples of example outcomes and projects that could come from the information gained through this study? This would correlate closely with our Recycling/Composting Outreach and Education in the future. It would inform our approach and allow us to use relevant data collected locally as opposed to gross generalizations. Big picture: it can help identify needs and implement the most efficacious solutions in the future.
7. How will you gather the data on quantities and types of materials being sent to the landfill? Republic Services has agreed to assist SNO in tracking Big Sky specific garbage haulers when the assessments are occurring. Those haulers will be diverted to dump ~½ of their load at a safe and predetermined location for sorting. We will hire temp workers to sort & weigh the waste. The sorted waste will be categorized and recorded in pounds, and then it will be put back into a dumpster to be discarded appropriately at Logan Landfill.
8. Will this include all waste in Big Sky, both household and construction? This will address both household and commercial waste. We will not be assessing construction waste as the difficulty is greater due to the fact that it's managed by private contractors.
9. Are you still pursuing the alternative funding? If yes, would your ask decrease based on what they provide? If you are not still pursuing, please explain why.
 - a. At this time we're not because we don't think it's likely to get funding for this project as this process is typically funded by municipalities or county government.
10. In 2-3 sentences, describe the mechanics on how you will conduct a Big Sky-specific waste composition study. With assistance from Republic Services and via the Logan Landfill check-in system, we are able to identify Big Sky-specific waste and categorize it as either residential or commercial.

Project Name: Recycling/Composting Education & Outreach

Project Questions:

1. What is the lifespan of the deliverables provided on the application?
 - a. Transition Farmers Markets & Music in the Mountains to Zero-Waste
SNO hopes to have a solid transition with food vendors (as they are the greatest producers of waste AT the market) to compostables primarily (most takeaway containers are not recyclable in Gallatin County) by the end of the summer/event season of 2022.

We hope to have other, non-food vendors onboard successfully in 2023. Both the Arts Council and TCOA have agreed to implement a “3 strike rule” in their vendor contracts in which SNO, the composting company, recycling company, and compostable suppliers are listed as resources. If vendors are not in compliance at 3 different events, they will be asked not to participate until next summer at which time they will be thoroughly reviewed before receiving an invitation back. Realizing this goal is ambitious, it is likely that a 3rd summer of 2024 may have some elements of implementation.

- b. “How To Recycle/Compost” videos
These will be relevant as long as there is confusion about which materials are categorized as recyclable and/or compostable in Gallatin County.
 - c. Maintain social media and other publicity platforms to share resource
In perpetuity.
 - d. Visual signage on SNO's Town Center & Softball 4-hole bins
In perpetuity/until what is recyclable in Gallatin County changes.
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
This is a public works and community education driven project. It also contributes to pervasive community health and safety in a similar manner to the Waste Composition Assessment and Town Center & Softball Field Recycling & Composting
3. Are you working with HOAs to provide recycling and composting?
Yes, we coordinated with BSOA & Republic Services on reinstating curbside recycling and bearproof bins. The hard work that BSOA put in to provide both items is being shared with SNO's database, and active outreach is being pursued to create a greater mass of households using Republic's curbside recycling service. We also tried to coordinate with L&L to create competitive pricing, but have yet to see success in these efforts.
4. Do you feel we have adequate recycling locations to push individuals towards these efforts?
No. We are currently engaged in discussions with the Resort to place additional drop off bins at the resort staff housing near the softball fields. Nothing has yet been confirmed, but the process is going well with the Resort, Full Circle Recycling/WeRecycleMT, and Gallatin County Solid Waste on board and abreast of progress. Additional and more accessible community recycling locations is one of the main issues that we hear from people around Big Sky, and one that we feel is within SNO's scope to address.
5. If you were to receive funding, would you use that to try and get alternative matching funds?
If community funding from BSRAD could be used as an incentive or a qualifier in finding matching grant funding, we would certainly pursue those options. Understanding that some foundational grants require matches, we would use our funding to leverage those opportunities, as appropriate.



FY23 DISTRICT QUESTIONS

Sponsor: Big Sky Chamber of Commerce

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: *Brad Niva Brad@bigskychamber.com, Caitlin Quisenberry Caitlin@bigskychamber.com, Katie Grice Katie.Grice@BoyneResorts.com*
 - b. June 9: *Brad Niva Brad@bigskychamber.com, Caitlin Quisenberry Caitlin@bigskychamber.com, Katie Grice Katie.Grice@BoyneResorts.com*
2. Does your organization seek funding from sources outside of the BSRAD boundary? *Yes, we have a membership model where we receive funds from our 460 members. 60% of our members are inside the BSRAD boundary, and 40% are in the Four Corners/Bozeman area.*
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? *Due to a cut in our staffing of 25% in 2021 we're currently meeting the needs of our staff in regards to wages and cost of living. We've also instituted a work from home program two days a week for those employees who live in Bozeman.*
4. What is the purpose of the restricted and unrestricted reserves outlined on your Sponsor Efficiency Worksheet? *The Chamber of Commerce has board restricted funds for the eventual purpose of buying a building to house the visitor center and chamber offices. A majority of these funds are proceeds from the sale of the building 160 Snowy Mountain Circle (where Caliber Coffee is now)*
 - a. Additionally, what does the VIC Relocate? *Proceeds from the sale of a property owned by the Chamber that are restricted for future purchase of a building.*
5. On the LOI you listed \$445,000 as your "FY24 Predicted Request" and \$500,000 as your "FY25 Predicted Request". When cross referenced with project data the total projected amounts come to \$375,075 in FY24 and \$393,557 in FY25.
 - a. Please explain the discrepancy in predicted requests for both FY24 & FY25: *Between the LOI application and then our full application we made cuts to three projects. Our community business training we cut \$65,000 ask to \$45,000. We cut our operations from \$228,000 to \$168,000 and finally, we cut a whole project out that was \$46,000. With these new numbers we went from LOI ask of \$405,000 to application ask of \$279,000 which is a 31% decrease in our ask.*
 - b. Please clarify the organizations predicted requests for both FY24 & FY25: *For FY24 with existing projects from FY23 application plus LOI FY24 projects the total ask is: \$375,075, for FY25 we're at \$393,557 for our total.*
6. Why was the designated CVB, which receives state funding, shifted from the Chamber to Visit Big Sky in 2017? *The Chamber of Commerce is a membership based organization. Often when a membership based organization receives public tax dollars, some in the community might think that those public funds are for members only. Common trend throughout the country has been*

to separate tourism services away from Chambers. In 2017, the Big Sky Chamber spun off the tourism services side to a new non-profit known as Visit Big Sky. A separate 501 C6 organization that serves the tourism and hospitality industry. Membership isn't required and its role is to be a stand-alone non-bias tourism marketing and management office. 2017

- i. The Chamber was formed in 1985 to focus on economic development in the Big Sky community. When the state established a Convention and Visitor's Bureau in 2001 with monies collected by the bed tax, the Chamber became the locally recognized fiscal sponsor as the only nonprofit in the community focusing on destination marketing. Visit Big Sky was created in 2012 to focus on marketing of summer and winter and let the Chamber focus more on destination development separate from marketing. The CVB does not have its own tax ID and needs to be under another nonprofit. At that time, the Chamber maintained all of the administrative services for Visit Big Sky and as a result continued to administer the CVB. In 2017, new leadership took over the Chamber and was tasked with cleaning up the finances that were left by a previous contractor's accounting discrepancies. Our tax preparation firm recommended that VBS become the official fiscal sponsor of the CVB as the two missions are better aligned and a management agreement be created where VBS pays the Chamber for administration costs.*
- 7. Your request this year has increased by 21% compared to your request last year, have your other revenue sources increased at this same rate? If not, why? As stated above, we submitted a number of projects in the LOI process. After feedback and seeing other projects in the community we chose to make some cuts to our original LOI ask. Overall, we cut 31% of our budget from the original LOI. Overall, this year's ask is \$279,000 which is a 13% reduction from the FY2022 award of \$321,000.*
- 8. Your request is higher than projected, please explain what is different this year that is creating this variance from what you projected? Please see above, the original LOI project list was more robust. We made the decision to cut some projects to lower our overall ask.*
- 9. What plans do you have to bring your administrative costs percentage down? We are working internally to lower our administration costs below 40% of our total budget. Typical chamber admin ratios hover between 30 to 40%. This process doesn't happen overnight, but with new leadership in place we're in the process of correcting that. We've also added new revenue streams that will go into effect in January 2023, which will increase our membership significantly and our revenue, so in future years we won't be asking for administrative funding from BSRAD.*
- 10. What is your current dues and fees structure? The Chamber of Commerce is a membership based 501 C6. We have 8 levels of membership that range from \$205 a year to over \$10,000 a year for business. More details can be found at <https://bigskychamber.com/our-business/#!/meminfo>*
 - a. Is there an opportunity to adjust them to address the funding gap? We're doing an overall review of our membership program and considering having only five levels and increasing membership levels as well. Basic membership will go from \$350 to \$400 a year. The Chamber hasn't raised its rate since 2018.*

Project Name: Big Sky Chamber Operations

Project Questions:

1. What are the lifespans of the deliverables provided on the application?
 - a. Being the voice for local businesses on matters impacting them- 5+ years
 - b. A one sheet menu of “family friendly practices” 2+ years
 - c. Advocating to our elected officials for important topics that directly affect our businesses: 3+ years
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Advocate for businesses and non-profits to partner and collaborate*
3. What is the cost-of-living variance between Big Sky, Bozeman, and other comps? *We’re in the process of interviewing a contractor to take a dive into this dataset. In this year’s application is an ask, to fund workforce research where these comparisons will be addressed. Just as an FYI, current online free platforms say the variance is 0% which we all know isn’t accurate or telling the full story.*
4. Aside from housing, what are the biggest needs or challenges for local businesses? *As in the above question, we’re asking BSRAD to fund a study where we interview business owners on what challenges they are facing to grow and expand their businesses. We know that housing is probably the number one issue limiting business in Big Sky. However, we think there are other things that are creating barriers to workforce retention such as: transportation, childcare and livability issues that are inhibiting our business community.*
5. Please provide an update on improving cell service in Big Sky? *Crown Castle, the company that we’ve invited to Big Sky is currently in the contract phase with Lone Mountain Land and Big Sky Medical Center to house two new cell towers. One up in the Moonlight Basin area on LMLC land. The other is in TownCenter (on top of the tallest building) . The process has been terribly slow but this summer of 2022 things are picking up. One more tower needs to be in place to fix a majority of our “holes”. Unfortunately, BSR has declined the request to host a tower on their property, so we’re looking at LMLC land as an option. The \$10 million project will not cost the community of Big Sky anything. Crown Castle feels the major cellular providers will flip the bill for the expansion. We wish we had a leverage point to make this go faster, but because they’re paying the bill we’re working from their schedule.*
6. What role are you playing in the community evacuation plan? *We were the catalyst in getting the CPAW (Community Planning Assistance for Wildfire) grant for our community. The BSFD had applied three years in a row. Through an existing relationship with CPAW and the Chamber CEO Brad Niva, we were able to make this project a reality. The role of the Chamber/VBS is to speak on behalf of the tourism economy and our visitors. Brad has experience with wildfire evacuations in heavily visited destinations. One of the keys is to have proper communication with visitors to get them going in the right direction. With the build-out of the new community wide wayfinding project we’re hoping to integrate evacuation signage to give visitors exit strategies to leave Big Sky.*
7. What is your year over year membership revenue? 2020- \$171,904, 2021- \$244,965 2022 YTD- \$234,497 (expected to match 2021)

- a. Have you seen an increase or decrease? *Increase*
 - b. Do any of the membership fees get allotted to the expenses for the direct programs that serve them? *Membership fees contribute to the general fund and are used as operating expenses, programming and wages.*
8. It looks like you expect to request less from BSRAD for your administration moving forward, however a larger dollar amount overall from BSRAD, what do you account that increase too then? *As in previous questions above, the board wasn't told that we adjusted projects after the LOI process. We are now asking for less than in previous years. In FY2022 our award was \$321,000 and the FY23 ask is \$279,000 which is a reduction of 13% from last year.*
 - a. What specific things are you doing to decrease your reliance on BSRAD for your operations? *The Chamber has the goal to remove all admin and operations from future BSRAD applications by FY26. If we can accomplish that sooner, we certainly will. All future asks will be for community focused projects. The Chamber has instituted a number of new revenue streams and we anticipate those funds covering our operations and admin expenses. However, we can't do it overnight so we're asking for a few more years of funding to help us reach that goal.*
9. On the project budget, it appears you will have no matching dollars for this for the next two fiscal years and that it would be fully funded by BSRAD. Can you please explain? *Thank you for catching that. That is an error, we'll definitely be able to make the minimum match of 20% to support the BSRAD ask.*

Project Name: Business Skill Building Trainings

Project Questions:

1. What are the lifespans of the deliverables provided on the application?
 - a. Four Diversity, Equity, and Inclusion (DEI) training workshops that will take place over two months and result in a tourism inclusion, diversity and equity committee to further support expanding resources and identify the need in Big Sky- *Lifespan of 3+ years*
 - b. Four human resource best practices trainings that will take place every quarter- *Lifespan of 3+ years*
 - c. Twelve Small Business Networking Sessions that will be monthly -*Lifespan of 1+ years*
 - d. Weekly Social media posts for small businesses that will be weekly in perpetuity - *Lifespan of 1+ years*
 - e. Bi-weekly Interviews with business owners to create a comprehensive understanding of needs -*Lifespan of 3+ years*
 - f. Additional trainings on timely topics dependent on emergent needs identified in business interviews-*Lifespan of 3+ years*
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Create educational opportunities for businesses*
3. What are the current needs of your businesses that will help you establish which trainings to host in the upcoming year? *Our board of directors has their ear to the ground and advises staff on current topics and trends affecting industries. We're looking to add a new "education committee" that will report to our board of directors.*

4. What will the fee structure be for these trainings? *We try to make them free of charge, however we do need to charge a nominal fee to cover expenses. Typically, meeting room space.*
5. Will all these trainings be led by outside contractors? *In most cases, yes.*
6. If your goal is 20% attendance, do you think these are worthwhile? *That is 40 businesses which is 20% of our membership. Typically we have over 40 participants at each session.*
7. Why the \$9k overall decrease in project budget after this year? *We believe the first year we'll have a better understanding of topics and interest of our community. We're putting more out there to see what hits and then dial back the next two years with a tested list of programs.*
8. How are the networking gatherings a business skill training? *We hear from our businesses through surveys and face to face interactions that Big Sky is a difficult community to "break in to" and they want networking opportunities. Many new businesses or businesses from Bozeman enjoy opportunities to learn about the unique make up of our community and meet potential partners that they can collaborate with or learn from. It helps increase our base of people who recognize the economic driver that is Big Sky while also bolstering it.*
9. What was last year's participation - *We had 57 businesses participate in FY22 business programs. Most of them were all Big Sky based businesses.*

Project Name: Leadership Big Sky

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Create educational opportunities for businesses*
2. Please provide year over year participation data since program inception. *In the three years this program was established it has been sold out every year with a waiting list. Maximum in the program is 20 participants. To date 51 participants have graduated. That is an 85% graduation rate.*
3. How can you work to decrease the cost of this event? *The largest expense is meeting room space, but the Wilson gives us a nonprofit discount. With BASE online now, we can look to host some class days there but they may not have all day availability like we need. It's a fairly lean program for what it offers and limiting the costs might take away from the value of it whereas adding some capital to it can help increase the offerings as well as the ability to offer scholarships to nonprofits and smaller businesses who have a more definitive bottom line.*
4. Why the decrease in dues, fees, and sales in 2024/2025? *It looks to me as though you are going to stop charging. Why not continue to charge and decrease your ask of BSRAD? Unfortunately our budget sheet had an error in regard to FY24 and FY25. We're planning to use the same numbers for FY23 in the following years. \$16,000 in dues, fees and sales. We will always charge a fee to participate.*

Project Name: Workforce Sustainability

Project Questions:

1. What are the lifespans of the deliverables provided on the application?

- a. Economic report that includes community data and workforce data, business survey information that will be compiled into a document that will be updated every other year with timely information -*Lifespan 2+ years*
 - b. Recommendations for new avenues to capture data on Big Sky to be acted upon for future data gathering *Lifespan of 2+ years*
 - c. Industry facing website with information that is relevant for people looking to do business in Big Sky *Lifespan of 2+ years*
 - d. A survey based database that really encapsulates the needs of our business owners to be successful. This project will be updated every other year. *Lifespan of 2+ years*
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Provide tools for recruitment and retention*
 3. What are the “Contract Services” expenses outlined in the project budget? *That is the fee to pay the consultant to do the surveying and report back the findings.*
 4. Is there an end date to this research? *We’re planning on a 4 week data gathering process which would be face to face or by electronic survey. We’ll do the data collection a second time in FY25 as well and report back.*
 - a. How will the findings be used to increase workforce sustainability? *We’re hoping the data defines some general themes that we as a community can then address and try to fix. We of course know housing will be number one, but are there other things that can be done to support our workforce.*
 - b. How will this research inform decision making and planning? *The research will give us a baseline that will help with planning and decision making. Right now, there is a lot of noise in this space, but no solid information that we can use. We hope this study can make things clearer.*
 - c. Will the findings of this research identify future capital needs? *It could, it’s not the goal of the project but we might gain some insight into future capital needs.*
 5. Will this consultant be including helping define cost of living increases and comparable community pay scales, so that we have a base line for the information that we are receiving for all businesses to utilize? *Yes, this is the real reason to bring in a professional company to build and facilitate the data collection. Our goal is to have a comprehensive snapshot of what is happening in Big Sky and then compare ourselves to other similar communities.*
 6. Please explain why your project financials page indicates a \$25k request for the same project but with no matching funds. *As in previous questions, we didn’t map out future matching funds, we just did it for FY23. Our mistake, we will be bringing matching funds into future FY24 and FY25 budgets.*
 7. How are the local businesses engaged in this project with the consultant? *That will be based on the recommendation of our consultant. Overall, we’re thinking electronic surveys will be the most cost effective but might not capture the breadth of the community. We believe some one on one meetings or community engagement meetings will be needed to capture more information.*
 8. 40 businesses seem like a small subset of your membership - why such a low number for the survey? *It meant to say top 40 employers, not 40 businesses.*

9. Have you pursued economic development grants to match funds? *We have not, but it's on our list to pursue for additional funds.*

Project Name: Upkeep of Town Entrance Lights and Bus Stop

Project Questions:

1. What are the lifespans of the deliverables provided on the application?
 - a. Nine fully lit and decorated highway lights at the entrance of town that are in working order illuminating the entrance to town every night of the year *Lifespan of 20+ years*
 - b. Two new safe and snow free bus stops that will service the work force using them every day of the year *Lifespan of 20+ years*
 - c. 18 banners that announce to a passerby that a community exists here and welcomes them to explore further *Lifespan of 2+ years*
 - d. Maintenance of the nine light posts and two new wildlife warning lights *Lifespan of 20+ years*
 - e. Snow removal at the two new bus stops that the Tiger Grant will provide *Lifespan of 20+ years*
 - f. Liability insurance protecting the Chamber of Commerce in regards to the MOU with Gallatin County *Lifespan of 1+ years*
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Manage the visitor experience with clear information*
3. Who maintains the other bus stops in Big Sky? *We're not aware of this.*
4. *Have you approached the Transportation District to cover these costs? We have not, the county required the Chamber to sign an MOU to cover a these multiple projects.*
5. Who maintains the other lights on MT-64? *Don't know.*
6. How long have the bus stop and the lights been at this location? *Lights in place since 2017*
 - a. How have they been paid for in previous years? *The Chamber has been paying annually.*
 - b. Was it always the intention to have Resort Tax cover this cost? If so, why was this not communicated to the District? *This is unknown.*
7. Can this be paid from the RID? *We're not aware of an RID that this section of town is included in. However, if someone knows more about this we'd be happy to pursue.*
8. Is there any capacity to merge this public works with another entity in our community to prevent being over-insured as a community? *We've asked BSCO to manage this project but they declined.*
9. Please provide the agreement that requires the Chamber to pay for the maintenance and lights on Hwy 64. *See attached form*
10. Can you combine your vision for the entrance with some level of marketing/sales to get a revenue stream for assistance with funding? For example, why not use the welcome signs to say welcome but allow a business to "buy it" and put their logo on it to offset some of this cost? Like Welcome from Roxy's Grocery. *As the entrance to town, this is an important welcome – a setting the stage for our visitors and a welcome home for our residents. How does commercialization of this space benefit the identity of Big Sky. I think it is a small price to pay to leave it inspirational and welcoming rather than more advertising.*

11. Why change the banners so often? Can you simply have year-round signs? *We can consider that. That would mean no christmas decorations, or seasonal welcome to Big Sky. The banners offer a seasonal welcome to our visitor.*

CONFIDENTIAL
PRIVILEGED ATTORNEY WORK PRODUCT

M E M O R A N D U M

January 5, 2022

TO: Brad Niva

FROM: Jordan Helvie

RE: Preliminary Overview: Memorandum of Agreement – MT HWY 64 Rural
Commuter Corridor Project

I. Overview

The following overview is based upon unconfirmed facts from representatives at Gallatin County, and it is my understanding of events at this time.

At some point in time Gallatin County (“**County**”) applied for a grant (“**Tiger Grant**”) from the Federal Highway Administration (“**FHWA**”) to perform improvements on Lone Mountain Trail (also referred to as MT HWY 64 – Rural Commuter Corridor). Big Sky Chamber of Commerce (“**Chamber**”) former CEO, Candance Carr Strauss, participated in the grant application process and purportedly represented that the Chamber would accept responsibility for maintaining bus pullouts and lampposts.

Gallatin County was awarded the Tiger Grant. In order to perform the improvements on Lone Mountain Trail, the State of Montana Department of Transportation (“**MDT**”) required Gallatin County to accept certain legal obligations that MDT would typically be required to perform. Approximately in June 2021, Gallatin County and MDT entered into a Memorandum of Agreement (“**MDT Agreement**”) whereby Gallatin County agreed to, in part, maintain bus stops and lighting along Lone Mountain Trail. A copy of the MDT Agreement is attached with my email as Exhibit A – MDT Agreement.

At some point in time, Gallatin County presented the Chamber and The Big Sky Community Organization (“**BSCO**”) with a Memorandum of Agreement (“**County MOA**”) which proposed that the Chamber and BSCO would accept responsibility for certain aspects of the MDT Agreement. A copy of the proposed County MOA is attached with my email as Exhibit B – County MOA. The BSCO signed the County MOA in May 2021. The obligations delegated to the Chamber in the County MOA are analyzed in the proceeding sections.

II. County MOA Section 4(b)(i): Shared-Use Path

County MOU Section 4(b)(i) states that the Chamber will accept responsibility and liability for the County’s obligations related to the shared use path as required by Article IV (Paragraph 1)

of the MDT Agreement. The County has represented that this provision is a typo and should not be included in the County MOA.

III. County MOA Section 4(b)(ii): Light, excluding any lighting installed within the pedestrian tunnel by BSCO

County MOA Section 4(b)(ii) states that the Chamber will accept responsibility and liability for the County’s obligations related to lighting as required by Article IV (Paragraph 2) of the MDT Agreement. These obligations are defined by the MDT Agreement as follows:

2. Lighting

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, to **service, maintain, repair and pay the costs of operating (including utility costs) the decorative and pedestrian lighting installed within MDT right-of-way.**
- b. **Maintenance of lighting under section 2(a) above means: the inspection of the lighting system for operation, cleaning lamps, lenses and reflectors, stocking of replacement parts, bulb replacement, and repairs to and replacement of damaged fixtures.**
- c. Any repair costs for lighting damage not recoverable from third parties shall be the responsibility of the County.
- d. If the cost of energy is raised by the utility company, the County, or special improvement district shall pay their proportionate share of the rate increase.

(emphasis added). The MDT Agreement does not define which lights are considered “decorative and pedestrian lighting” and which lights might be characterized otherwise.

IV. County MOA Section 4(b)(iii): Bus Stops

County MOA Section 4(b)(iii) states that the Chamber will accept responsibility and liability for the County’s obligations related to bus stops as required by Article IV (Paragraph 3) of the MDT Agreement. These obligations are defined by the MDT Agreement as follows:

3. Bus Stops

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, **to service, maintain, repair, and pay the cost of operating the bus stops within the MT 64 (X-81064) right-of-way,** such that these acts do not negatively impact the operation of the bus stops or the safety of the traveling public. **If all or part of the bus stops becomes**

unsafe for use, the County agrees to restrict access to the affected area until the condition has been remedied.

b. Maintenance of bus stop under section 3(a) above means: grinding or milling down displacements; surface patching; crack sealing; pavement sealing; sweeping; cleaning; washing; replacing portions of damaged bus stop; removal of snow and ice; repair of chipped, fractured, or broken surface from any cause, including but not limited to frost heaving, landscaping, tree roots, or encroachments; removal of debris and other obstructions or impediments to the safe travel of pedestrians or other users; maintenance of all associated drainage features; maintenance of bus stop signs; and any and all other normally accepted maintenance practices.

c. For the purposes of this Agreement, “maintenance of bus stop signs,” is defined as: the inspection, cleaning, repair and replacement of signs damaged through weathering, vandalism, wind, and other means.

(emphasis added). The plans and specifications provided by the County appear to show that there will be two bus pull-outs. The plans and specifications do not show the design of bus stops that will be built at these pullouts.

V. County MOA Section 4(c)(i): Bus Stop Public Safety

County MOA Section 4(b)(iii) states that the Chamber will accept responsibility and liability for the County’s obligations related to public safety at the bus stops as required by Article V (Paragraph 6) of the MDT Agreement. These obligations are defined by the MDT Agreement as follows:

6. Public Safety

It is agreed, if any repairs to the elements of the Project must be performed to address or prevent a public hazard, the County will immediately protect the area from public access, contact the appropriate MDT Butte District Maintenance Office, and make reasonable and timely effort to correct or repair the hazard.

VI. County MOA Section (4)(a): Construction and Maintenance Standards

County MOA Section (4)(a) states that to the extent the Chamber performs any construction or maintenance work within the MDT’s right-of-way then the Chamber will follow the construction and maintenance standards required by Article I of the MDT Agreement. Based

upon statements made within the MDT Agreement, it appears that all lighting and bus stops are within the MDT's right-of-way. These obligations are defined by the MDT Agreement as follows:

1. The Parties acknowledge the County has agreed to, and MDT has approved the general design of the Project including left-turn bays, traffic signal, shared-use path, pedestrian tunnel, retaining walls, landscaping, lighting, and bus stops planned for installation within MDT right-of-way. The documents are identified as Attachment B attached and made part of this agreement.
2. The County will submit and receive approval from MDT Butte District Traffic Engineer for a traffic control plan prior to allowing work within MDT right-of-way.
3. The County shall schedule a preconstruction meeting with MDT Bozeman Area staff to discuss construction-related activities and coordination prior to initiating any work within MDT right-of-way. MDT Bozeman Area Maintenance staff must be notified, and an approval received a minimum of four (4) calendar days prior to commencing any construction and/or maintenance work within MDT right-of-way.
4. The County agrees that no fixture, building, structure, or other permanent installation other than those shown in Attachment B shall be constructed or placed within MDT right-of-way without prior approval from MDT.
5. The County, at its sole expense, agrees to repair, or cause to be repaired, any damages to MT 64 (X-81064) and/or US 191 (N-50) right-of-way attributable to the County's construction or maintenance of the Project. The County agrees it will repair MT 64 (X-81064) and US 191 (N-50) right-of-way to approved standards determined by MDT. Any damage identified by the County must be repaired within 60 calendar days of malfunction or damage. Any damage identified by MDT must be repaired by the County within 60 calendar days of notice by MDT, as solely determined by MDT.
6. The County agrees any maintenance of the Project or existing shared-use path within MDT right-of-way that requires lane closure or equipment must be reviewed and approved by MDT Butte District staff and Bozeman Area Maintenance staff prior to initiation of the maintenance.
7. The County shall complete the necessary environmental processes for modification to the state highways and roadways and demonstrate that all, if any, environmental issues associated with the proposed project have been identified and mitigated. The County

agrees it will prepare and file any required environmental documents and apply for and obtain any permits required by other governmental agencies at no expense to MDT prior to maintenance taking place within MDT designated right-of-way.

8. If the County fails to perform or cause to be performed, the maintenance obligations as required by this agreement within 60 days of written notification from MDT, MDT may complete the required maintenance and the County shall be required to compensate MDT in the amount of the direct and indirect costs incurred by MDT for its performance of said maintenance.

9. MDT may complete any maintenance contemplated by this Agreement that is required due to a public emergency without prior notice to the County. The County agrees to be responsible for and to reimburse MDT in the amount of the direct and indirect costs incurred by MDT for said maintenance.

10. The County must provide for contract performance security for future maintenance work if MDT Butte District determines a security is required. The bond amount and term will be determined by the MDT Bozeman Area Maintenance Chief based on maintenance work scope and impact to MDT facilities. The requirements for the security will be based on the State of Montana requirements for contract performance bonds.

COUNTY/STATE MEMORANDUM OF AGREEMENT
MT HIGHWAY 64 – RURAL COMMUTER CORRIDOR PROJECT
CONSTRUCTION/MAINTENANCE AGREEMENT
MAY 2021

This Memorandum of Agreement (“Agreement”) is made and entered into by and between Gallatin County (“the County”), whose address is 311 W. Main St, Bozeman, MT 59715 and the State of Montana Department of Transportation (“MDT” or “the State”), whose address is 2701 Prospect Ave. P.O. Box 201001, Helena MT 59620-1001, together referred to as “the Parties”.

The Purpose of this Agreement is to set forth the respective design, construction and maintenance responsibilities and duties of the Parties associated with the MT Highway 64 – Rural Commuter Project within MDT right-of-way on MT 64 (X-81064) from the intersection with US 191(N-50) Reference Post (RP) 0.0 to the intersection with Big Sky Resort Road (L-29-834) RP 8.75. This Agreement sets forth terms necessary for the County to provide for or caused to be provided for long term maintenance of the existing and new shared-use path, pedestrian tunnel, retaining walls, landscaping, lighting, and bus stops, shown in Attachment B within the MDT right-of-way (the “Project”).

WHEREAS, MDT is responsible for planning, designing, constructing, and maintaining the State highway and roadway associated transportation facilities, including associated pull-off, parking areas, and rest areas for the use and benefit of the traveling public, in a safe and efficient manner in accordance with Title 23 United State Code (U.S.C.) and Title 60 Montana Code Annotated (MCA) including MT 64 (X-81064) and US 191 (N-50); and

WHEREAS, the County received a grant from FHWA for the MT Highway 64 – Rural Commuter Corridor Project, and

WHEREAS, US 191 (N-50) is on the National Highway System within the State of Montana and is eligible to receive Federal Highway Funds; and

WHEREAS, the County has agreed to be responsible for or will require others to be responsible for the maintenance of the existing and new shared-use path, pedestrian tunnel, retaining walls, landscaping, lighting, and bus stops within MDT right-of-way; and

WHEREAS, in accordance with the State’s agreement with the Federal Highway Administration (FHWA) of the U.S. Department of Transportation, MDT must ensure that certain requirements are met in order for MDT to fulfill its obligations to the FHWA and for US 191 (N-50) to be eligible for federal funds; and

WHEREAS, the Project includes the installation of pedestrian tunnel, new shared-use path, path connections, bus stops, left-turn bays, and traffic signal within MDT right-of-way on

MT 64 (X-81064) and US 191 (N-50) within the Gallatin and Madison County, per approved plans (Attachment B); and

WHEREAS, through the “Memorandum of Agreement Between the Montana Department of Transportation and Gallatin County, Montana Concerning the Big Sky Trail Project Along MT 64,” entered in March 2007, the Parties previously set forth the conditions under which MDT allowed the Big Sky Trail Project to encroach into MDT right-of-way along Montana Highway 64; and

WHEREAS, the County has agreed be to maintain, or cause to be maintained the shared-use path, pedestrian tunnel, retaining walls, landscaping, lighting, and bus stops within the MT 64 (X-81064) and US 191 (N-50) right-of-way subject to this Agreement; and

WHEREAS, this Agreement must be fully executed before the facilities may be installed within MDT right-of-way; and

WHEREAS, the Parties agree this Agreement supersedes the Big Sky Trail Project Agreement dated March 2007.

NOW, THEREFORE, the Parties set forth the fundamental duties and responsibilities necessary for the County to maintain or cause to be maintained the facilities proposed by the Project within MDT right-of-way.

ARTICLE I. OBLIGATIONS OF THE COUNTY:

1. The Parties acknowledge the County has agreed to, and MDT has approved the general design of the Project including left-turn bays, traffic signal, shared-use path, pedestrian tunnel, retaining walls, landscaping, lighting, and bus stops planned for installation within MDT right-of-way. The documents are identified as Attachment B attached and made part of this agreement.
2. The County will submit and receive approval from MDT Butte District Traffic Engineer for a traffic control plan prior to allowing work within MDT right-of-way.
3. The County shall schedule a preconstruction meeting with MDT Bozeman Area staff to discuss construction-related activities and coordination prior to initiating any work within MDT right-of-way. MDT Bozeman Area Maintenance staff must be notified, and an approval received a minimum of four (4) calendar days prior to commencing any construction and/or maintenance work within MDT right-of-way.
4. The County agrees that no fixture, building, structure, or other permanent installation other than those shown in Attachment B shall be constructed or placed within MDT right-or-way without prior approval from MDT.
5. The County, at its sole expense, agrees to repair, or cause to be repaired, any damages to MT 64 (X-81064) and/or US 191 (N-50) right-of-way attributable to the

County's construction or maintenance of the Project. The County agrees it will repair MT 64 (X-81064) and US 191 (N-50) right-of-way to approved standards determined by MDT. Any damage identified by the County must be repaired within 60 calendar days of malfunction or damage. Any damage identified by MDT must be repaired by the County within 60 calendar days of notice by MDT, as solely determined by MDT.

6. The County agrees any maintenance of the Project or existing shared-use path within MDT right-of-way that requires lane closure or equipment must be reviewed and approved by MDT Butte District staff and Bozeman Area Maintenance staff prior to initiation of the maintenance.
7. The County shall complete the necessary environmental processes for modification to the state highways and roadways and demonstrate that all, if any, environmental issues associated with the proposed project have been identified and mitigated. The County agrees it will prepare and file any required environmental documents and apply for and obtain any permits required by other governmental agencies at no expense to MDT prior to maintenance taking place within MDT designated right-of-way.
8. If the County fails to perform or cause to be performed, the maintenance obligations as required by this agreement within 60 days of written notification from MDT, MDT may complete the required maintenance and the County shall be required to compensate MDT in the amount of the direct and indirect costs incurred by MDT for its performance of said maintenance.
9. MDT may complete any maintenance contemplated by this Agreement that is required due to a public emergency without prior notice to the County. The County agrees to be responsible for and to reimburse MDT in the amount of the direct and indirect costs incurred by MDT for said maintenance.
10. The County must provide for contract performance security for future maintenance work if MDT Butte District determines a security is required. The bond amount and term will be determined by the MDT Bozeman Area Maintenance Chief based on maintenance work scope and impact to MDT facilities. The requirements for the security will be based on the State of Montana requirements for contract performance bonds.

ARTICLE II. GENERAL OBLIGATIONS OF MDT

MDT will:

1. Notify the County and grant permission to partially close and /or initiate work on MT 64 (X-81064) and/or US 191 (N-50) after execution and under the terms of this

MOA as such right-of-way work is determined appropriate by the MDT Bozeman Area Maintenance Chief.

2. Assign staff to provide construction oversight during the County's construction or maintenance work as determined necessary. The MDT Butte District staff will determine when construction oversight is required. If question arise during construction contact the MDT Bozeman Area Maintenance Chief.
3. Establish MDT's Point of Contact for construction as well as fee assessment related issues for this project is the Bozeman Area Maintenance Chief, Kyle DeMars, kdemars@mt.gov, (406)556-4704 or cell phone (406)581-0732.
4. Require all traffic control plans to be approved by Butte District Traffic Engineer, Lee Alt, lalt@mt.gov (406)494-9611.
5. Report any fees assessed monthly to MDT Fiscal Operation – Tracy Davis, by the Bozeman Area Maintenance Chief.
6. Notify the County within five (5) days prior to the initiation of any penalties.
7. MDT, at MDT's sole expense, agrees it will maintain the roadway, curbing, and traffic signals on US 191 (N-15) and MT 64 (X-81064) associated with the Project in a satisfactory condition.
8. MDT agrees to review any encroachments within the Project area on MDT right-of-way for compliance with state and federal laws and rules. If encroachment is allowed within MDT right-of-way, MDT will issue the appropriate permits

ARTICLE III. PROJECT SPECIFIC PROVISIONS:

1. Construction Storm Water General Permit
 - a. The County will follow the DEQ and County Storm Water Pollution Prevention Plan (SWPPP) requirements
 - b. The County will pay annual fees associated with permit coverage until termination of the Construction Storm Water General Permit.

ARTICLE IV. PROJECT SPECIFIC FEATURES:

1. Shared-Use Path

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, to service, maintain, repair, and pay the cost of operating the entire (existing and new portions) shared-use path within the MT 64 (X-81064) right-of-way, such that these actions do not negatively impact the operation of the path or the safety of the traveling public. If all or part of the shared-use path becomes unsafe for use, the County agrees to restrict access to the affected area until the condition has been remedied.
- b. Maintenance of the shared-use path under subsection 1(a) above means: grinding or milling down displacements; surface patching; crack sealing; pavement sealing; sweeping; cleaning; washing; replacing portions of damaged path; removal of snow and ice; repair of chipped, fractured, or broken surface from any cause, including but not limited to frost heaving, landscaping, tree roots, or encroachments; removal of debris and other obstructions or impediments to the safe travel of pedestrians or other path users; maintenance of all associated drainage features; maintenance of path-related signs; maintenance pedestrian safety fencing or railing; and any and all other normally accepted maintenance practices.
- c. For the purposes of this Agreement, “maintenance of shared-use path signage,” is defined as: the inspection, cleaning, repair and replacement of signs damaged through weathering, vandalism, wind, and other means.

2. Lighting

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, to service, maintain, repair and pay the costs of operating (including utility costs) the decorative and pedestrian lighting installed within MDT right-of-way.
- b. Maintenance of lighting under section 2(a) above means: the inspection of the lighting system for operation, cleaning lamps, lenses and reflectors, stocking of replacement parts, bulb replacement, and repairs to and replacement of damaged fixtures.
- c. Any repair costs for lighting damage not recoverable from third parties shall be the responsibility of the County.
- d. If the cost of energy is raised by the utility company, the County, or special improvement district shall pay their proportionate share of the rate increase.

3. Bus Stops

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, to service, maintain, repair, and pay the cost of operating the bus stops within the MT 64 (X-81064) right-of-way, such that these acts do not negatively impact the operation of the bus stops or the safety of the traveling public. If all or part of the bus stops becomes unsafe for use, the County agrees to restrict access to the affected area until the condition has been remedied.

- b. Maintenance of bus stop under section 3(a) above means: grinding or milling down displacements; surface patching; crack sealing; pavement sealing; sweeping; cleaning; washing; replacing portions of damaged bus stop; removal of snow and ice; repair of chipped, fractured, or broken surface from any cause, including but not limited to frost heaving, landscaping, tree roots, or encroachments; removal of debris and other obstructions or impediments to the safe travel of pedestrians or other users; maintenance of all associated drainage features; maintenance of bus stop signs; and any and all other normally accepted maintenance practices.
- c. For the purposes of this Agreement, “maintenance of bus stop signs,” is defined as: the inspection, cleaning, repair and replacement of signs damaged through weathering, vandalism, wind, and other means.

4. Landscaping/Irrigation Equipment

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, to service, maintain and repair the landscaping and irrigation equipment installed as part of this project.
- b. Maintenance of landscaping and irrigation system under section 4(a) above means mowing, watering, debris removal, weed control, fertilizing, tree/shrub trimming including removal, replacement and maintenance of sight triangles, the repair and replacement of fences, and maintenance of all features in compliance with ADA/PROWAG. The irrigation system shall be fully operational, free of leaks, with heads selected and adjusted to reduce water waste.
- c. If the County is not able to complete the maintenance on the landscaping and irrigation system as per this Agreement, MDT may require the County to remove the improvements that it installed or constructed at the County’s sole cost and expense. MDT may also remove the landscaping and irrigation system without County approval and seek compensation for the removal of the landscaping and irrigation system from the County.
- d. The County will complete revegetation of MDT right-of-way and maintain any revegetated areas until vegetation is established including weed spraying. MDT Bozeman Area Maintenance staff will determine when vegetation is established.

5. Retaining Walls

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, to service, maintain, and repair the retaining walls within the Project limits, such that the retaining wall do not negatively impact the operation of the pedestrian tunnel, shared-use path; pedestrian safety fencing or railing; or the safety of the traveling public. If all or part of the pedestrian tunnel; pedestrian safety fencing or railing, or shared-use path becomes unsafe for use, the County

agrees to restrict access to the affected area until the condition has been remedied.

- b. Maintenance of the retaining walls under subsection 5(a) means: annual inspection and any required repair to prevent compromise of the structure or pedestrian safety fencing or railing. Annual inspection report must be submitted to the MDT Bozeman Area Maintenance Chief and the MDT State Bridge Engineer.

6. Pedestrian Tunnel

- a. Upon completion of the Project, the County agrees that it is responsible or will cause others to be responsible, at no cost to MDT, to service, maintain, repair, and pay the cost of operating the pedestrian tunnel; pedestrian safety fencing or railing within the Project limits, such that the pedestrian tunnel does not negatively impact the operation of the pedestrian tunnel, path or the safety of the traveling public. If all or part of the pedestrian tunnel, pedestrian safety fencing or railing, or shared-use path becomes unsafe for use, the County agrees to restrict access to the affected area until the condition has been remedied.
- b. Maintenance of the Pedestrian Tunnel under subsection 6(a) means: annual inspection of the structure and any necessary repairs including pedestrian safety fencing or railing and confirming the tunnel lighting is functioning in good working order. Annual inspection report must be submitted to the MDT Bozeman Area Maintenance Chief and the MDT State Bridge Engineer

ARTICLE V. GENERAL TERMS AND CONDITIONS:

1. **Term** – The term of this Agreement shall be ten (10) years. After the initial ten (10) year term, this Agreement will renew automatically, for successive one (1) year terms, unless superseded by a new Agreement between the Parties. The Agreement supersedes the March 2007 Memorandum of Agreement regarding the Big Sky Trail Project.
2. **Termination** – This Agreement may be terminated by MDT if the County violated or breaches any term, condition, or article of this Agreement and the County has failed to correct (or reasonably initiate correction) within 60 days of receiving notice in writing addressed to the County’s representative, or such violation or breach of any term, condition, or article of the Agreement.

If this Agreement is terminated, MDT may require the County to remove the improvements that it installed or constructed in the MDT right-of-way pursuant to this Agreement at the County’s sole cost and expense. MDT may also remove the improvements without the County’s approval and seek compensation for the removal of the improvements from the County.

3. Other Agreements – Other Agreements not identified in this Agreement pertaining to the Project area remain in full force and effect. In case of a conflict between this Agreement and a previously executed Agreement, the terms of this Agreement apply.
4. Hold Harmless & Indemnification
 - a. The County agrees to protect, defend, indemnify, and hold MDT, its elected and appointed officials, agents, and employees, while acting within their duties as such, harmless from and against all claims, liabilities, demands, causes of action, and judgments (including the cost of defense and reasonable attorney fees) arising in favor of or asserted by the County's employees or third parties on account of personal or bodily injury, death or damage to property, arising out of the actions or omissions of the County, its agents or sub-contractors, under this Agreement, except the negligence of MDT.
 - b. The State and MDT agrees to protect, defend, indemnify, and hold the County, its elected and appointed officials, agents, and employees while acting within their duties as such, harmless from and against all claims, liabilities, demands, causes of action, and judgements (including the cost of defense and reasonable attorney fees) arising in favor of or asserted by the MDT's employees or third parties on account of personal or bodily injury, death or damage to property, arising out of the acts or omissions of MDT, its agents, or sub-contractors, under this Agreement, except the negligence of the County.
5. Insurance
 - a. General Requirements: Each Party shall maintain for the duration of this Agreement, at its own cost and expense, insurance against claims for injuries to persons or damages to property that may arise from or in connection with the performance of duties and obligations in this Agreement by each Party, its agents, employees, representatives, assigns, or sub-contractors. This insurance shall cover such claims as may be caused by any negligent act or omission.
 - b. General Liability Insurance: Each Party shall purchase and maintain occurrence coverage with combined single limits for bodily injury, personal injury, and property damage of \$1 million per occurrence and \$2 million aggregate per year to cover such claims as may be caused by or arising out of any negligent acts or omissions in work or services performed under this Agreement, or as established by statutory tort limits as provided under this Agreement or as established by statutory tort limits as provided by a public entity self-insurance program either individually or on a pool basis as provided by Montana Code Annotated Title 2, Chapter 9.
 - c. General Provisions: All insurance coverage must be with a carrier licensed to do business in the State of Montana or by a public entity self-insured

program either individually or on a pool basis. Each Party must notify the other immediately of any material change in insurance coverage, such as changes in limits, coverage, change in status of policy, etc. Each Party reserves the right to request complete copies of the other Party's insurance policy or self-insured memorandum of coverage at any time.

- d. **Workers' Compensation Insurance:** The County must maintain workers' compensation insurance and require its contractors and its contractor's sub-contractors to carry their own workers' compensation coverage while performing work within MDT right-of-way in accordance with Montana Code Annotated §§39-71-401 and 39-71-405. Neither the contractor nor its employees are employees of MDT. This insurance/exemption must be valid for the entire Agreement period.

6. Public Safety

It is agreed, if any repairs to the elements of the Project must be performed to address or prevent a public hazard, the County will immediately protect the area from public access, contact the appropriate MDT Butte District Maintenance Office, and make reasonable and timely effort to correct or repair the hazard.

7. Invoicing and Indirect Costs (IDC)

- a. If MDT incurs any costs resulting from this Agreement, MDT shall be entitled to be compensated for such costs by the County and the County shall pay the same within thirty (30) days of its receipt of such invoices.

Montana Code Annotated §17-1-106, requires any state agency, including MDT, which received non-general funds to identify and recover its indirect costs (IDC). These costs are in addition to direct Project costs. MDT's IDC rate is determined annually as a percentage of the Project's direct costs to cover the Project's share of MDT's IDC as defined by 2 CFR Part 200, Appendix VII. MDT's current IDC rate is 10.99% for fiscal year 2021 (July 1, 2020 to June 30, 2021). If the work occurs or extends into fiscal year 2022 or beyond the IDC rate will be charged at the rate agreed to by MDT and the Federal Highway Administration (FHWA).

- i. Invoice will be sent to:
Gallatin County
Attn: Jamie Grabinski
311 W. Main St, Room 304
Bozeman, MT 59715
- ii. Payments shall be made to:
Montana Department of Transportation

Attention: Collections
2701 Prospect Avenue
PO Box 201001
Helena MT 59620-1001

8. Choice of Law and Venue – This Agreement shall be governed by the laws of Montana. The Parties agree that any litigation concerning this Agreement must be brought in the First Judicial District Court, in and for the County of Lewis and Clark, State of Montana, and each Party shall pay its own costs and attorney fees except as otherwise noted in this Agreement. In case of conflict between the terms and conditions of this Agreement the laws of the State of Montana, the laws of the State of Montana Shall control.
9. Binding Effect – The benefits and obligations set forth in this Agreement shall be binding upon, and inure to the benefit of, their respective successors, administrators and assigns of the Parties.
10. Relationship of Parties – Nothing contained in this Agreement shall be deemed or construed (either by the Parties hereto or by any third party) to create the relationship of principal and agent or create any partnership joint venture or other association between the Parties.
11. Non-Discrimination – The County will require that during the performance of any work arising out of this Agreement the County, for itself, assignees, and successors shall comply with all applicable non-discrimination regulation set forth in Attachment A attached hereto and made a part of this Agreement.
12. ADA – MDT requires that any construction resulting from this Agreement must include appropriate pedestrian facilities that meet or exceed current MDT standards for accessibility as set forth by the United States Department of Justice 2010 ADA Standards for Accessibility Design, United States Access Board Proposed Guidelines for Pedestrian Facilities in the Public Right-of-Way (2011 PROWAG), and MDT's detained drawings, 608 series.
13. Audit – The County grants to the Legislative Auditor and the Legislative Fiscal Analysts the right, without prior notice and during normal business hours, to audit, at their own costs and expense all records, reports, and other documents, the County maintains in connection with this Agreement.
14. Utilities – This Agreement is subject to the right of any private or public utility entity now lawfully occupying the right-of-way to continue to operate and maintain utility facilities thereupon. Copies of existing utility permits may be obtained from the MDT District Utility Agent.

15. Amendment and Modification – This Agreement may be modified or amended only by written Addendum signed by the Parties. In addition to the terms and conditions contained herein, the provisions of any Addendum may be incorporated and made a part hereof by this reference in the terms of the amendment so provided. In the event of any conflict between the terms and conditions hereof and the provisions of any Addendum, the provision of the Addendum shall control, unless the provisions thereof are prohibited by law.

16. Representatives

- a. County's Representative: The County's Representative for this Agreement shall be the County Commission Chairman or designee or such individual as the County shall designate in writing. Whenever approval or authorization form or communication or submission to the County is required by this Agreement, such communication or submission shall be directed to the County's Representative and approvals or authorizations shall be issued only by such Representative; provided, however, that in exigent circumstances when the County's Representative is not available, MDT may direct its communication or submission to other designated County personnel or agents.
- b. MDT's Representative: The MDT Representative for this Agreement shall be the District Administrator or Maintenance Chief or such other individual as MDT shall designate in writing. Whenever direction to or communication with MDT is required by this Agreement, such direction or communication shall be directed to MDT's Representative; provided, however, that the exigent circumstances when MDT's Representative is not available, the County may direct its directions or communication or submission to other designated MDT personnel or agents.

17. Counterpart Execution – This Agreement may be executed in two or more counterparts, each of which shall be deemed an original but all of which together shall constitute one and the same Agreement. The counterparts of this Agreement may be executed and delivered by facsimile or other electronic signature by any of the Parties to any other party and the receiving party may rely on the receipt of such document so executed and delivered by facsimile or other electronic means as if the original had been received.

IN WITNESS WHEREOF, the Department’s authorized representative has hereunto signed on behalf of the State of Montana, and the County Commission Chairman of the Gallatin County, on behalf of the County, has signed and affixed hereto the seal of the County.

STATE OF MONTANA, DEPARTMENT OF TRANSPORTATION

DocuSigned by:
William C. Fogarty
By 9E98DA7B733A4F2... 6/11/2021, 2021
Montana Department of Transportation

DocuSigned by:
Carol Grell Morris
C3685E7AED144B6...
Approved for Legal Content

DocuSigned by:
Patricia Schwinden
CDF2B6A0A2C34EC...
Approved for Civil Rights

GALLATIN COUNTY

DocuSigned by:
Scott MacFarlane
By 2909BF0862B046A... 6/11/2021, 2021
Scott MacFarlane – Chair
Gallatin County Commission

ATTEST:

APPROVED AS TO FORM AND CONTENT:

DocuSigned by:
Eric Semerad
0CCD55AEB3B04DE...
Eric Semerad
Gallatin County Clerk and Recorder

DocuSigned by:
Erin Arnold
D268B295A2064CB...
Erin Arnold
Deputy County Attorney

(SEAL)

ATTACHMENT A

MDT Nondiscrimination and Disability Accommodation Notice

**MDT NONDISCRIMINATION
AND
DISABILITY ACCOMMODATION NOTICE**

Montana Department of Transportation (“MDT”) is committed to conducting all of its business in an environment free from discrimination, harassment, and retaliation. In accordance with State and Federal law MDT prohibits any and all discrimination and protections are all inclusive (hereafter “protected classes”) by its employees or anyone with whom MDT does business:

Federal protected classes

Race, color, national origin,
sex, sexual orientation, gender identity,
age, disability, & Limited English Proficiency

State protected classes

Race, color, national origin, parental/marital
status, pregnancy, childbirth, or medical
conditions related to pregnancy or childbirth,
religion/ creed, social origin or condition,
genetic information, sex, sexual orientation,
gender identification or expression, national
origin, ancestry, age, disability mental or
physical, political or religious affiliations or
ideas, military service or veteran status

For the duration of this contract/agreement, the PARTY agrees as follows:

(1) Compliance with Regulations: The PARTY (hereinafter includes consultant) will comply with all Acts and Regulations of the United States and the State of Montana relative to Non-Discrimination in Federally and State-assisted programs of the U.S. Department of Transportation and the State of Montana, as they may be amended from time to time, which are herein incorporated by reference and made a part of this contract.

(2) Non-discrimination:

- a. The PARTY, with regard to the work performed by it during the contract, will not discriminate, directly or indirectly, on the grounds of any of the protected classes in the selection and retention of subcontractors, including procurements of materials and leases of equipment, employment, and all other activities being performed under this contract/agreement.
- b. PARTY will provide notice to its employees and the members of the public that it serves that will include the following:
 - i. Statement that PARTY does not discriminate on the grounds of any protected classes.
 - ii. Statement that PARTY will provide employees and members of the public that it serves with reasonable accommodations for any known disability, upon request, pursuant to the Americans with Disabilities Act as Amended (ADA).
 - iii. Contact information for PARTY’s representative tasked with handling non-discrimination complaints and providing reasonable accommodations under the ADA.

- iv. Information on how to request information in alternative accessible formats.
- c. In accordance with Mont. Code Ann. § 49-3-207, PARTY will include a provision, in all of its hiring/subcontracting notices, that all hiring/subcontracting will be on the basis of merit and qualifications and that PARTY does not discriminate on the grounds of any protected class.

(3) Participation by Disadvantaged Business Enterprises (DBEs):

- a. If the PARTY receives federal financial assistance as part of this contract/agreement, the PARTY will make all reasonable efforts to utilize DBE firms certified by MDT for its subcontracting services. The list of all currently certified DBE firms is located on the MDT website at mdt.mt.gov/business/contracting/civil/dbe.shtml
- b. By signing this agreement, the PARTY assures that:

The contractor, sub recipient or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49 CFR part 26 in the award and administration of DOT-assisted contracts. Failure by the contractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as the recipient deems appropriate.

- c. PARTY must include the above assurance in each contract/agreement the PARTY enters.

(4) Solicitation for Subcontracts, Including Procurement of Materials and Equipment: In all solicitations, either by competitive bidding, or negotiation, made by the PARTY for work to be performed under a subcontract, including procurements of materials, or leases of equipment, each potential subcontractor or supplier will be notified by the PARTY of the PARTY's obligation under this contract/agreement and all Acts and Regulations of the United States and the State of Montana related to Non-Discrimination.

(5) Information and Reports: The PARTY will provide all information and reports required by the Acts, Regulations, and directives issued pursuant thereto and will permit access to its books, records, accounts, other sources of information and its facilities as may be determined by MDT or relevant US DOT Administration to be pertinent to ascertain compliance with such Acts, Regulations, and instructions. Where any information required of a contractor is in the exclusive possession of another who fails or refuses to furnish the information, the PARTY will so certify to MDT or relevant US DOT Administration, as appropriate, and will set forth what efforts it has made to obtain the information.

(6) Sanctions for Noncompliance: In the event of a PARTY's noncompliance with the Non-discrimination provisions of this contract/agreement, MDT will impose such sanctions as it or the relevant US DOT Administration may determine to be appropriate, including, but not limited to:

- a. Withholding payments to the PARTY under the contract/agreement until the PARTY complies; and/or
- b. Cancelling, terminating, or suspending the contract/agreement, in whole or in part.

(7) Pertinent Non-Discrimination Authorities:

During the performance of this contract/agreement, the PARTY, for itself, its assignees, and successor in interest, agrees to comply with the following non-discrimination statutes and authorities; including but not limited to:

Federal

- Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d *et seq.*, 78 stat. 252), (prohibits discrimination on the basis of race, color, national origin); and 49 CFR Part 21;
- The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 U.S.C. § 4601), (prohibits unfair treatment of persons displaced or whose property has been acquired because of Federal or Federal-aid programs and projects);
- Federal-Aid Highway Act of 1973, (23 U.S.C. § 324 *et seq.*), (prohibits discrimination on the basis of sex);
- Section 504 of the Rehabilitation Act of 1973, (29 U.S.C. § 794 *et seq.*), as amended, (prohibits discrimination on the basis of disability); and 49 CFR Part 27;
- The Age Discrimination Act of 1975, as amended, (42 U.S.C. § 6101 *et seq.*), (prohibits discrimination on the basis of age);
- Airport and Airways Improvement Act of 1982, (49 U.S.C. § 471, Section 47123), as amended, (prohibits discrimination based on race, creed, color, national origin, or sex);
- The Civil Rights Restoration Act of 1987, (PL 100-209), (broadened the scope, coverage, and applicability of Title VI of the Civil Rights Act of 1964, The Age Discrimination Act of 1975, and Section 504 of the Rehabilitation Act of 1973, by expanding the definition of the terms “programs or activities” to include all of the programs or activities of the Federal-aid recipients, sub-recipients, and contractors, whether such programs or activities are Federally funded or not);
- Titles II and III of the Americans with Disabilities Act, which prohibits discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 U.S.C. §§ 12131-12189) as implemented by Department of Transportation regulations at 49 CFR parts 37 and 38;
- The Federal Aviation Administration’s Non-Discrimination statute (49 U.S.C. § 47123) (prohibits discrimination on the basis of race, color, national origin, and sex);
- Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which prevents discrimination against minority populations by discouraging programs, policies, and activities with disproportionately high and adverse human health or environmental effects on minority and low-income populations;

- Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination because of Limited English Proficiency (LEP). To ensure compliance with Title VI, you must take reasonable steps to ensure that LEP persons have meaningful access to your programs (70 Fed. Reg. at 74087 to 74100);
- Title IX of the Education Amendments of 1972, as amended, which prohibits you from discriminating because of sex in education programs or activities (20 U.S.C. § 1681 *et seq.*).
- Executive Order 13672 prohibits discrimination in the civilian federal workforce on the basis of gender identity and in hiring by federal contractors on the basis of both sexual orientation and gender identity.

State

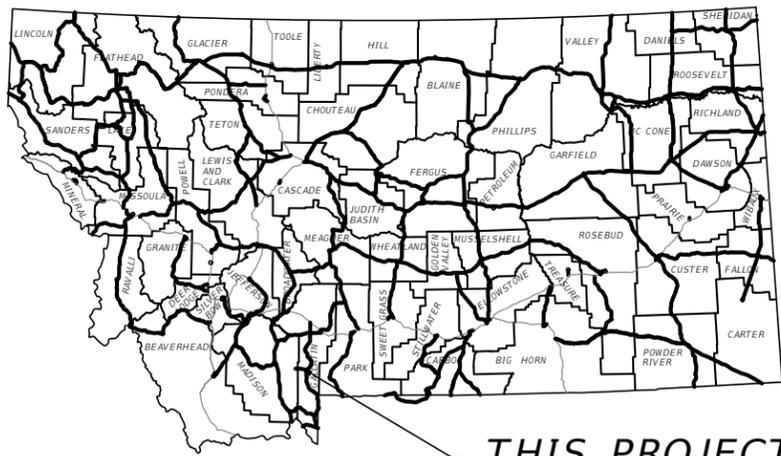
- Mont. Code Ann. § 49-3-205 Governmental services;
- Mont. Code Ann. § 49-3-206 Distribution of governmental funds;
- Mont. Code Ann. § 49-3-207 Nondiscrimination provision in all public contracts.

(8) Incorporation of Provisions: The PARTY will include the provisions of paragraph one through seven in every subcontract, including procurements of materials and leases of equipment, unless exempt by the Acts, the Regulations and/or directives issued pursuant thereto. The PARTY will take action with respect to any subcontract or procurement as MDT or the relevant US DOT Administration may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, that if the PARTY becomes involved in, or is threatened with litigation by a subcontractor, or supplier because of such direction, the PARTY may request MDT to enter into any litigation to protect the interests of MDT. In addition, the PARTY may request the United States to enter into the litigation to protect the interests of the United States.

ATTACHMENT B

Plans

Trail Location



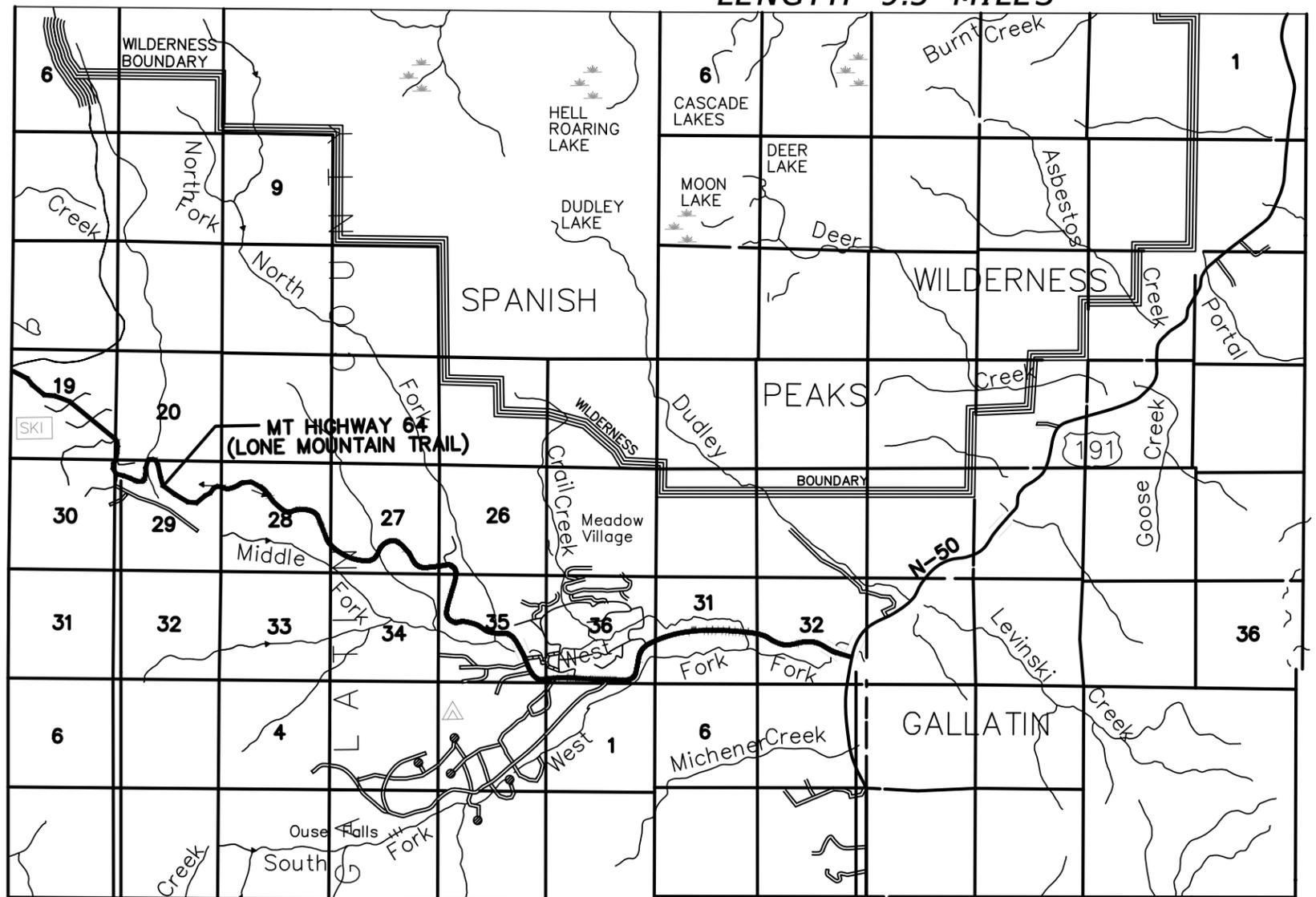
THIS PROJECT

MONTANA DEPARTMENT OF TRANSPORTATION

MT HIGHWAY 64 RURAL COMMUTER CORRIDOR PROJECT FHWA FY 2017 TIGER GRANT No. 11 BIG SKY GALLATIN/MADISON COUNTY

SURFACING_SOURCES -
CONTRACTOR_FURNISHED

LENGTH 9.5 MILES



T. 6 S.

T. 7 S.

R. 3 E.

R. 4 E.

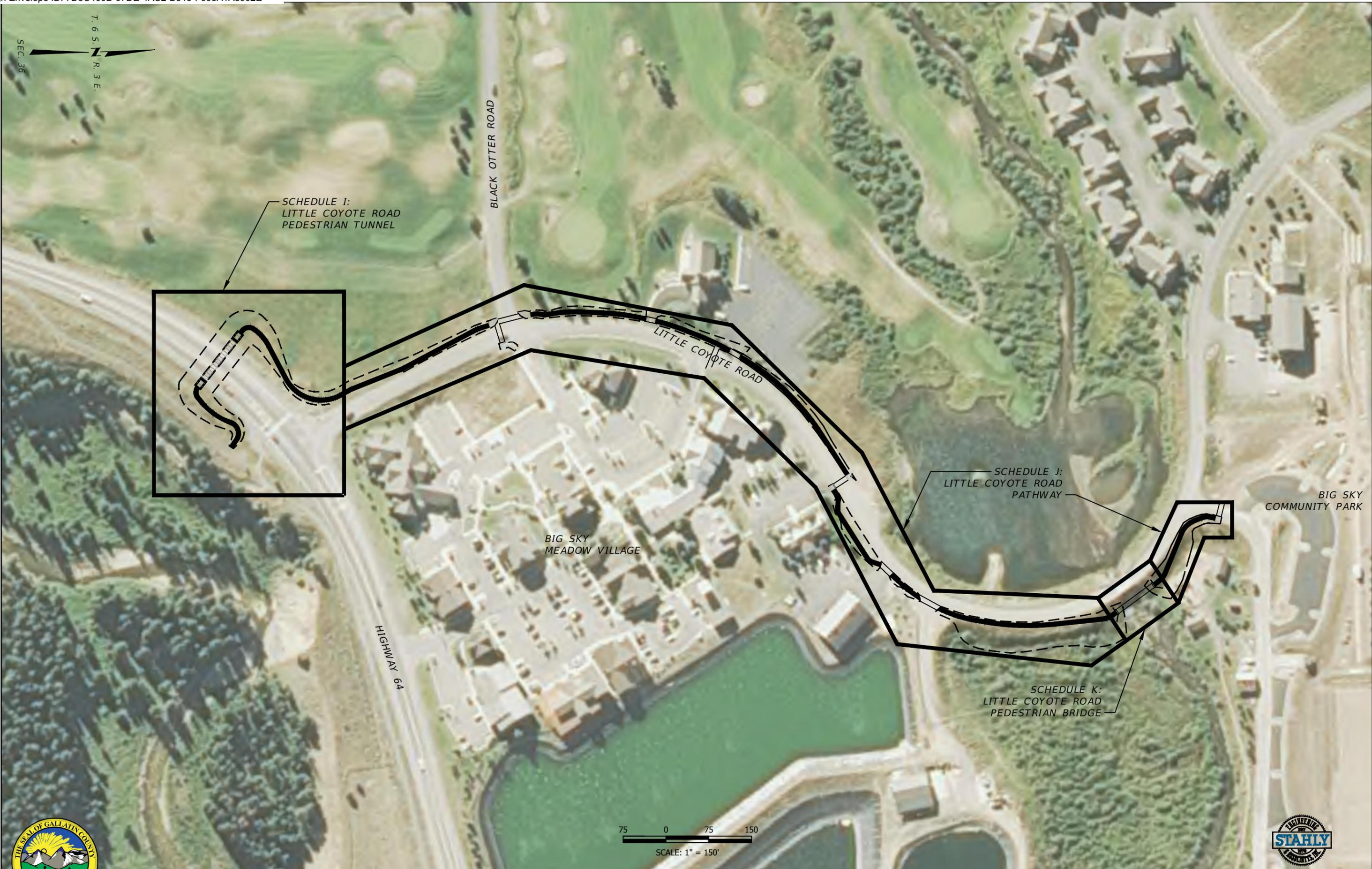
RP 9.5 TO RP 0.0

THIS CONTRACT

PLANS PREPARED BY
SANDERSON STEWART
106 E Babcock St. Suite L1
Bozeman, MT 59715
Phone: 406.656.5255
www.sandersonstewart.com

| | |
|---|---------------|
| SANDERSON STEWART | |
| BY _____ | |
| DATE _____ | |
| MONTANA DEPARTMENT OF TRANSPORTATION | |
| RECEIVED : | |
| BY _____ | DATE _____ |
| U.S. DEPARTMENT OF TRANSPORTATION FEDERAL HIGHWAY ADMINISTRATION | |
| APPROVED : | |
| _____ DIVISION ADMINISTRATOR | _____ DATE |





GALLATIN COUNTY
 2936-00119 Overall Trail
 Review: Q&A
 4/14/21
 Nate Peressini

DESIGNED BY NTP
 REVIEWED BY TJT, KLT, JMN
 CHECKED BY TJT, KLT, JMN

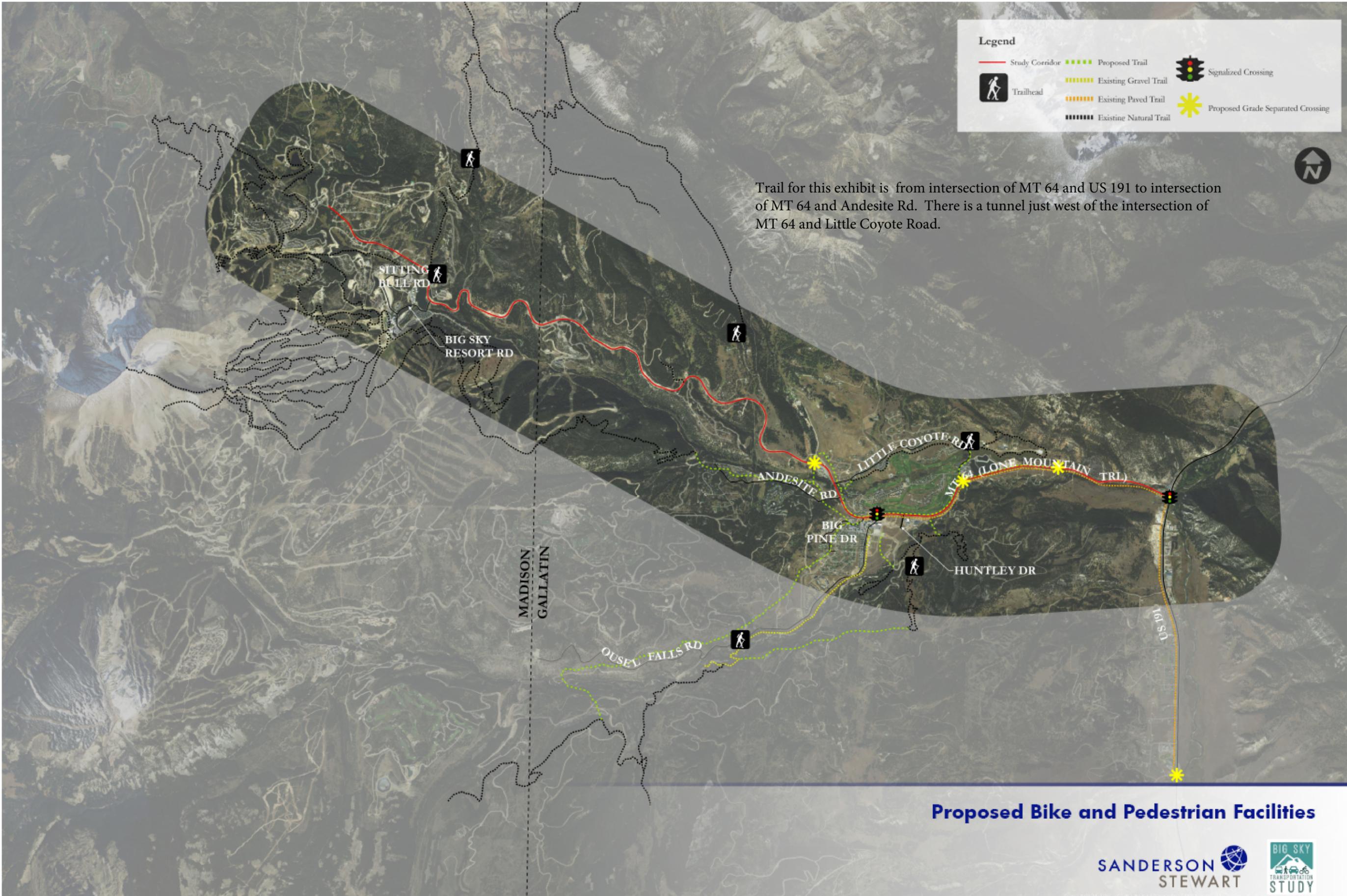
OVERALL TRAIL PLAN
 GALLATIN COUNTY, MADISON COUNTY

FOR BIDDING

MONTANA HIGHWAY 64 (LONE MOUNTAIN TRAIL)



SHEET LC1



Proposed Bike and Pedestrian Facilities



MEMORANDUM OF AGREEMENT
MT HWY 64 RURAL COMMUTER
CORRIDOR PROJECT

This Memorandum of Agreement is made and entered into by and among:

The Big Sky Community Organization, P.O. Box 161404, 32 Town Center Avenue, Unit B1, Big Sky, Montana 59716, (406) 993-2112 (hereinafter "BSCO"); the Big Sky Chamber of Commerce, P.O. Box 160100, 88 Ousel Falls Rd. Unit A1, Big Sky, Montana 59716, (406) 993-3606 (hereinafter "Chamber"); and Gallatin County, 311 West Main Street, Bozeman, Montana 59715, 582-3000 (hereinafter "County"); all collectively referred to as the "Parties".

WHEREAS, through that certain "Memorandum of Understanding Big Sky Spur Road Trail (AKA Highway 64 Trail)" entered between the County and BSCO in March 2007, the County consented to hold the trail along Highway 64, also referred to as the MT Hwy 64 Rural Commuter Corridor Trail ("Trail"), for the benefit of the public and, in exchange, the BSCO agreed to assume all responsibilities and liabilities required by the Montana Department of Transportation ("MDT") to encroach into its right-of-way for purposes of the Big Sky Trail Project along MT 64, including all governmental agency permits, development, construction, and long-term maintenance associated with the Trail;

WHEREAS, the County received a federal grant for the MT Highway 64 – Rural Commuter Corridor Project ("Project") and, as part of the Project, the Trail and Highway 64 will be improved through installation of a pedestrian tunnel, new shared-use path, path connections, pedestrian bridge, bus stops, retaining walls, landscaping, signage, and lighting ("Facilities");

WHEREAS, MDT and the County recently entered that certain County/State Memorandum of Agreement MT Highway 64 – Rural Commuter Corridor Project Construction/Maintenance Agreement April 2021 ("MDT Agreement"), by which MDT required the County to agree to maintain, or cause to be maintained, the Trail and the Facilities to obtain MDT's permission to perform the Project within MDT's right-of-way;

WHEREAS, the Parties recognize the significant public interest served by the Trail and the Facilities;

WHEREAS, through this Memorandum of Agreement, the County agrees to continue holding the Trail for the benefit of the public and, in exchange, BSCO and the Chamber will assume the responsibilities and liabilities required by MDT for the Project, as set forth below; and

WHEREAS, the County and BSCO desire this Memorandum of Agreement to supersede the March 2007 Memorandum of Understanding Big Sky Spur Road Trail (AKA Highway 64 Trail).

NOW, THEREFORE, in consideration of the mutual covenants and agreements between the BSCO and the County, it is agreed as follows:

1. DURATION. This Memorandum of Agreement is in effect until it is terminated in writing under the terms and conditions set forth in Section 6 (“Termination”) of this Memorandum of Agreement.
2. COUNTY RESPONSIBILITIES. The County agrees to hold the Trail for the benefit of the public and to take such actions necessary to defend the public’s continued use thereof. The County further agrees to install or cause to be installed the Facilities along the Trail and MT Highway 64 as part of the Project.
3. BSCO RESPONSIBILITIES. BSCO agrees that it assumes responsibility and liability for, and that it will comply with the following terms and conditions of, the MDT Agreement:
 - a. Article I. Obligations of the County, to the extent that BSCO performs any construction or maintenance work in MDT’s right-of-way; and
 - b. Article IV. Project Specific Features:
 - i. Paragraph 1. Shared-Use Path;
 - ii. Paragraph 2. Lighting, as to any lighting installed within the pedestrian tunnel;
 - iii. Paragraph 4. Landscaping/Irrigation Equipment;
 - iv. Paragraph 5. Retaining Walls, as it relates to the shared-use path;
 - v. Paragraph 6. Pedestrian Tunnel; and
 - c. Article V. General Terms and Conditions:
 - i. Paragraph 6, Public Safety, as it pertains to the shared-used path, landscaping/irrigation equipment, and pedestrian tunnel.

In addition, BSCO assumes responsibility and liability for maintenance and repair of the pedestrian bridge and new path connections leading to the pedestrian bridge at Little Coyote Road, as well as responsibility and liability for maintenance and repair of the shared-use-path along Little Coyote Road. Such maintenance and repair includes, but is not limited to, grinding or milling down displacements; surface patching; crack sealing; pavement sealing; sweeping; cleaning; washing; replacing portions of damaged path; removal of snow and ice; repair of chipped, fractured, or broken surface from any cause, including but not limited to frost heaving, landscaping, tree roots, or encroachments; removal of debris and other obstructions or impediments to the safe travel of pedestrians or other path users; maintenance of all associated drainage features; maintenance of path-related signs, including the inspection, cleaning, repair and replacement of signs damaged through weathering, vandalism, wind, or other means; maintenance pedestrian safety fencing or railing; and any and all other normally accepted maintenance practices.

4. CHAMBER RESPONSIBILITIES. The Chamber agrees that it assumes responsibility and liability for, and that it will comply with the following terms and conditions of, the MDT Agreement:
 - a. Article I. Obligations of the County, to the extent the Chamber performs any construction or maintenance work in MDT’s right-of-way; and
 - b. Article IV. Project Specific Features:

- i. Paragraph 1. Shared-Use Path;
- ii. Paragraph 2. Lighting, excluding any lighting installed within the pedestrian tunnel by BSCO;
- iii. Paragraph 3. Bus Stops; and
- c. Article V. General Terms and Conditions:
 - i. Paragraph 6, Public Safety, as it pertains to the bus stops.

In addition, the Chamber assumes responsibility and liability for the operation, maintenance, and repair of the wildlife crossing signage and solar-powered flashing beacons. Maintenance of the signage includes, but is not limited to, the inspection, cleaning, and replacement of signs and beacons damaged through weathering, vandalism, and other means.

5. HOLD HARMLESS AND INDEMNIFICATION. BSCO waives any and all claims and recourse against the County or its officers, agents or employees, including the right of contribution for loss or damage to person or property arising from, growing out of or in any way connected with or incident to the performance of this Memorandum of Agreement except claims arising from the intentional acts or concurrent or sole negligence of the County or its officers, agents or employees. BSCO will indemnify, hold harmless, and defend the County and its agents, principals, and employees from and against any and all claims, demands, damages, costs, expenses, losses, liability (including liability where activity is inherently or intrinsically dangerous), judgments, defense expenses, and attorney's fees rising out of or resulting from BSCO's wrongful acts, errors, omissions, or negligence, or from BSCO's failure to comply with the requirements of this Memorandum of Agreement or with all federal, state and local law applicable to the performance of this Memorandum of Agreement. In the event of an action filed against the County resulting from BSCO's performance under this Memorandum of Agreement, the County may elect to represent itself and incur all costs and expenses of suit. These obligations shall survive termination of this Memorandum of Agreement.

The Chamber waives any and all claims and recourse against the County or its officers, agents or employees, including the right of contribution for loss or damage to person or property arising from, growing out of or in any way connected with or incident to the performance of this Memorandum of Agreement except claims arising from the intentional acts or concurrent or sole negligence of the County or its officers, agents or employees. The Chamber will indemnify, hold harmless, and defend the County and its agents, principals, and employees from and against any and all claims, demands, damages, costs, expenses, losses, liability (including liability where activity is inherently or intrinsically dangerous), judgments, defense expenses, and attorney's fees rising out of or resulting from The Chamber's wrongful acts, errors, omissions, or negligence, or from the Chamber's failure to comply with the requirements of this Memorandum of Agreement or with all federal, state and local law applicable to the performance of this Memorandum of Agreement. In the event of an action filed against the County resulting from the Chamber's performance under this Memorandum of Agreement, the County may elect to represent itself and incur all costs and expenses of suit. These obligations shall survive termination of this Memorandum of Agreement.

6. TERMINATION. Any party may terminate its participation in this Memorandum of Agreement by thirty (30) days written notification to the other party. It is specifically

understood and agreed by the BSCO and the Chamber that if it terminates this Memorandum of Agreement for any reason, it must assign those applicable duties and obligations set forth above in Sections 3 and 4 to another legal entity. Prior to such assignment, the scope of the assignment and the assignment itself must be approved in writing by the County. Such approval shall not be unreasonably withheld.

7. ADDITIONAL ENTITIES. The County understands that the BSCO may, from time to time, enter into agreements with volunteer organizations for the maintenance of the Trail and the Facilities. Maintenance shall be conducted pursuant to written agreement in a form approved by the County authorizing the volunteer organizations to perform such maintenance on behalf of the BSCO. Such form shall require the volunteer group to hold the County and its employees and agents harmless and defend the same from any and all liability, judgments, costs, expenses, and performance or nonperformance of their work. The BSCO agrees to hold the County and its employees and agents harmless and to defend the same for any actions of the volunteer group.

8. CONSTRUCTION. The Parties hereto acknowledge that each party and their respective counsel have reviewed this Memorandum of Agreement and that the rule of construction to the effect that any ambiguities are to be resolved against the drafting party shall not be employed in the interpretation of this Memorandum of Agreement or any amendment or exhibits thereto.

9. LAWS & REGULATIONS. In performance of their obligations herein, the Parties, and their agents, and subcontractors, shall comply with all applicable federal, state and local laws, rules and regulations. The Parties agree that, in the performance of this Memorandum of Agreement, all hiring will be on the basis of merit and qualifications and the Parties will not discriminate on the basis of race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, or national origin. Further, the Parties agree that during the performance of any work arising out of this Memorandum of Agreement, the Parties shall comply with all applicable non-discrimination regulation set forth in Attachment A to the MDT Agreement, attached hereto and made a part of this Memorandum of Agreement.

10. INSURANCE. The BSCO and the Chamber shall each purchase and maintain Commercial General Liability insurance of no less than \$1,500,000.00 per occurrence. Such policies shall be primary and noncontributory and shall be maintained during the term of this Memorandum of Agreement. BSCO and the Chamber shall require their subcontractors to meet the same insurance coverage. Certificates of Insurance evidencing Gallatin County as additional insured and endorsement thereof must be supplied with the signed return of this Memorandum of Agreement. Such certificates shall require no less than fifteen (15) days notice of cancellation to COUNTY. The COUNTY shall be notified immediately of any changes or cancellation in coverage. Insurance shall be purchased from a company licensed to do business in Montana (with an "A" rated or better classification).

BSCO and the Chamber also each must maintain workers' compensation insurance and require its contractors and its contractor's sub-contractors to carry their own workers' compensation coverage while performing any maintenance or repairs pursuant to this Memorandum of Agreement. Neither BSCO nor its employees, nor the Chamber nor its employees, are employees of the County.

11. OTHER AGREEMENTS; INTEGRATION. This Memorandum of Agreement supersedes and replaces that certain March 2007 “Memorandum of Understanding Big Sky Spur Road Trail (AKA Highway 64 Trail)” between BSCO and the County. This Memorandum of Agreement represents the entire and integrated agreement among the Parties and supersedes all prior negotiations, agreements or representations, either written or oral.

12. BINDING EFFECT. The benefits and obligations set forth in this Memorandum of Agreement shall be binding upon, and inure to the benefit of, their respective successors, administrators and assigns of the Parties.

13. RELATIONSHIP OF PARTIES. Nothing contained in this Memorandum of Agreement shall be deemed or construed (either by the Parties hereto or by any third party) to create the relationship of principal and agent or create any partnership joint venture or other association between the Parties.

14. NON-WAIVER. No delay or failure by either party to enforce or assert any right, claim, defense, remedy, or provision of this Agreement shall operate as any waiver of any such right, claim, defense, or remedy.

15. COUNTERPART EXECUTION. This Agreement may be executed in two or more counterparts, each of which shall be deemed an original but all of which together shall constitute one and the same Memorandum of Agreement. The counterparts of this Memorandum of Agreement may be executed and delivered by facsimile or other electronic signature by any of the Parties to any other party and the receiving party may rely on the receipt of such document so executed and delivered by facsimile or other electronic means as if the original had been received.

BIG SKY COMMUNITY ORGANIZATION

Adam Johnson, Parks & Trails Director

Date

THE BIG SKY CHAMBER OF COMMERCE

Anna Johnson, Director of Business Development

Date

GALLATIN COUNTY

Scott MacFarlane, Commissioner Chairman

Date



FY23 DISTRICT QUESTIONS

Sponsor: Friends of the Big Sky Community Library

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Sue Arneson, Treasurer - bigskybucky@me.com (zoom), Kris Corzine, FOL Board Chair – chair@bigskylibrary.com
 - b. June 9: Kris Corzine, FOL Board Chair – chair@bigskylibrary.com
2. Does your organization seek funding from sources outside of the BSRAD boundary?

Yes

3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?

We have adapted to cost of living and workforce shortage issues in the following ways:

First FOL/ Big Sky Community Library addressed immediate human needs by increasing our staff hourly wages, increasing work hours so our positions are appropriate for professional and paraprofessional career paths and we are exploring how we can offer benefits this calendar year, making us a more appealing and sustainable employer.

Second we are looking for local talent who already have housing in the area. In spite of a robust national response to our job listings, we will only consider candidates who can prove they are housed in the local commute range thus not contributing to the housing crisis.

Third and most importantly we provide an excellent year-round work environment that includes career development and continuing education making our organization a highly desirable and stable employer.

4. Do current facilities address Big Sky's educational needs?

The current library facilities are shared with Ophir Middle School and Lone Peak High School. We recently had to adjust our hours so that no community members are in the building during school hours. This has severely limited our ability to address Big Sky's educational needs. Big Sky needs a library space that is open during the day to support families with young children, retired community members, people on a lunch break, and visitors. We are not able to provide that space currently. There is no space currently available in Big Sky and in an effort to continue to provide access to the library and its services, we need BSRAD funds to continue our operations within the constraints the school has provided while we explore other options for the future.

5. What gaps exist in childcare and education in Big Sky?

It's been published and is well known that Big Sky lacks enough pre-K care spaces and options. Big Sky also lacks sufficient continuing education opportunities for all ages. Part of that lack comes from adequate community space to hold the classes and part comes from a lack of organization and collaboration. There is a lack of foreign language learning opportunities in Big Sky. This applies to English as well as other languages. With the community library being closed during the school day, access has also been cut off for homeschool students and students at Discovery to a library in Big Sky.

6. Have you met with Discovery, the School District, Morningstar, after school program providers, and Camp providers to establish baseline metrics for education and childcare in Big Sky?

No, as a community library we are not a primary education provider and we are not licensed, nor is it in our mission, to provide formal education or childcare. We are working down the list to meet with the Big Sky education providers, including homeschool parents, so that we can understand their community library needs.

- a. If yes, what are the needs for the following
 - i. Square feet of facilities
 - ii. Necessary staffing
7. On the LOI you listed \$307,864 as your "FY24 Predicted Request" and \$265,515 as your "FY25 Predicted Request" When cross referenced with project data the total projected amounts come to \$457,864 in FY24 and \$365,515 in FY25.
 - a. Please explain the discrepancy in predicted requests for both FY24 & FY25

In looking back at the LOI, we included the \$150,000 that was listed as an additional project request into the FY24 predicted request. We did the same thing with the FY25 predicted request and the additional \$100,000 that was listed as an additional project request. We mistakenly included all of the additional project requests in the predicted requests for both years, instead of considering them separate requests.

Please clarify the organizations predicted requests for both FY24 & FY25

With the information we have currently and our present situation, we are predicting the requests for FY24 to be \$307,864 and FY25 to be \$265,515. We would like to let the board know that this is an evolving situation for FY24 & FY25 and we will keep you apprised of any and all updates as they happen.

8. Please describe your sources and plans for Public Grants, Private Donations and Other Revenue.

We are working on developing a consistent grant schedule right now. We have applied with the local foundations and will continue to do that to support our growing programs. We have begun researching grantors outside of Gallatin County and will be applying with a few in FY23. We are also looking into government grants through USDA and Rural Development for future growth. We have implemented a matching corporate donation for our annual memberships which has been great so far. We plan to continue that in FY23. We are also going to increase our membership and donor outreach in the community.

9. What do you believe the cause is for your private donation to have decreased 44% and grants 88% (as outlined in the Sponsor Efficiency Worksheet)?

In completing the sponsor efficiency document, we completed the “Previous FY” with the actual totals from our fiscal year ending July 31, 2021 and completed the next column (Current FY Budget) with the budget that had been prepared for FY22 in January 2021 (during the pandemic with a lot of uncertainty). The reported budget had been prepared in January 2021 based on the actual FY 2020 numbers in preparation for the FY22 BSRAD LOI and application. Based on the LOI form, the FY2022 budget should have been changed to our FY22 projected actual before it was put in the LOI to better address your efficiency formulas. Our FY22 budget that is included in the sponsor efficiency worksheet is not representative of our FY22 actuals. We did not think we should change the budget that had been submitted for FY22 as part of the previous year’s application for this year’s LOI.

Regarding the difference between the actual FY21 grant total (\$18,000) versus the budget (\$3,900) – the budget number of \$3,900 was significantly higher than the FY20 actual. \$2500 was received that year and the budget of \$3,900 represented a 56% increase from the actual. FOL was fortunate to be a recipient of a \$15,000 one time grant from 3Rivers Coop in FY21 to address COVID impact. That grant was unexpected and not budgeted for, which explains the difference between FY21 actual and FY22 budget.

FYI – the FOL has received grants over \$21,455 so far in FY22 and our Library Director continues to seek out and apply for others.

Regarding donations, throughout the years, the FOL has received “random” donations in the \$1,000 to \$2,500 range. There has not been a consistent donor that can be relied on year after year. For that reason, past budgets have been very conservative in our expectations. Again, FY22 donations have exceeded our budget due to our increased fundraising efforts at just over \$7,500 for individual and \$8,000 for matching corporate donations to date.

10. Your overall request this year is 59% greater than you projected last year FY22. What is different this year that is causing this significant increase?

When the FY22 application was prepared, the FOL assumed that the library would maintain its current level of staffing, programming, and overall operations and asked for a modest 3% increase from the current ask.

We had some unexpected changes to the library, including staffing, and have needed to adjust how we provide programming to the community, requiring us to abandon the “keep things the same” attitude in order to better serve the Big Sky Community. With that increase in programming outside of the library, activities and growth, comes increased costs.

11. Can you explain the budgeted 34% increase in BSRAD funding and the 44% decrease in private donations?

The increase in BSRAD funding is a lower percentage of our total budget for FY23. The reason for the increase in our total budget is growing our programming and outreach in the community. Our decrease in private donations is in budget only and not actual. The explanation for the difference is in question 9.

12. What plans do you have to decrease your reliance on BSRAD?

The FOL/ Big Sky Community Library has begun researching the option of becoming a tax district with the Montana State Librarian.

As outlined in Question 8, our new Library Director has been actively looking for new grants. This is new for the Library and is one of the steps that we are taking to reduce our reliance on BSRAD. The board is also working on a strategic plan to address this in the future.

13. What plans do you have to bring your administrative costs percentage down?

One of the biggest assets in a library is the librarian. Our administrative costs are largely the salaries that are essential to the functioning of any library and will not be going down if we want to continue to serve the community in any meaningful way like we want and Big Sky needs.

14. Do you have any update to the arrangement you have with the school and your space?

We are planning on meeting with the superintendent before the end of the school year to get updates.

15. Do you coordinate with Madison Valley Library or Bozeman Library?

We have met with the Bozeman Library director a few times and continue to communicate and collaborate with them. We also met with the State Librarian of Montana and our regional consulting librarian. We will also contact the Madison County Library Board.

We are exploring the impact on our library if we join a consortium with the publicly funded libraries in Bozeman, Belgrade, West Yellowstone, Three Forks, and Manhattan.

Project Name: Library Programming and Services

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?

Expand Educational Offerings

2. The year-round population of Big Sky is growing, is your program participation growing too? If so, how much growth did you see between the last year you were fully operational (knowing FY21 you were not due to COVID) to FY22?

We have already had more patron visits to the library this FY than the past 2 years with COVID. We are seeing fewer patrons since we have had to change the library hours, but are hoping that our increased summer hours will see us back at pre-COVID visits if not more. Our storytime participation has almost doubled since we moved it to BASE matching our pre-COVID storytime attendance. We are currently exceeding the year before COVID's new library patrons signing up and expect to see that trend continue throughout the year as well.

3. Does this project change based on the potential change in location and the hours adjustment with the school?

With the changes we have experienced thus far, we are increasing our programming outside of the library to accommodate the needs of the community. This project will only grow as we continue to see the community grow despite the adjustments we have had to make with the school. We are increasing our open hours during the summer and are confident we can find solutions with the school to better serve the community.

4. What are you doing to find additional matching dollars for your programming?
 - a. You note that there are other grant sources.
 - b. Are you utilizing them to their potential?

We are expanding our grant searches and will be applying to new grants that we haven't applied to before in FY23. We are working to utilize them all to their potential.

Project Name: Big Sky Community Library Operations

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?

Diversity, Inclusion, Equity, and Sustainability

2. Please provide metrics for the goals listed on the application.
 - a. Provide weekly access to the library space for Big Sky community members

According to the new Montana Public Library Standards, a community of under 3500 is required to be open to the public 15 hours a week. For FY23, we will work with the school to provide at least 20 open hours to the public during the school year, exceeding the requirement from the state. Starting June 13, we will be open 24 hours a week, including Saturday.

- b. Hold monthly community volunteer days in the library to maintain the space
We have volunteers come to the library the first and third Wednesdays of each month to maintain the space.
 - c. Subscribe to at least one grant database to identify and apply to appropriate grants for libraries

We have access to and use a grant database through both the American Library Association and DEMCO.

- d. Update equipment or renew software subscriptions used by library staff as needed
We will continue to ask for feedback from the community to determine database needs. We will update and renew our current technology and offerings.

3. Gallatin County currently collects 4.71 mills towards county wide libraries. Are you receiving these funds, if not please explain?

Our library is not eligible for these funds as we are not a municipal public library.

4. How many total hours are you scheduled to operate in FY23?
1,100 (including storytime at BASE)
 - a. What is your cost per hour for these hours of operation?

Our budgeted cost per hour for FY23 is \$143/hour.

- b. How does this compare to other rural libraries?

West Yellowstone is at \$134/hour according to the Institute of Museum and Library Sciences.

Many of our expenditures are fixed and not impacted by the number of hours we are open. This includes digital content that patrons can access anytime.

5. How does this request change with the current challenges you are having with your current space?

Our request doesn't change. We have made adjustments to where we offer some of our programming enabling us to continue serving the community.

6. What do you do to ensure people living in Big Sky know they have you as an option for internet and materials for learning?

We have started to build collaboration with the Food Bank and BASE. We are working on a marketing campaign to increase awareness of the library including an outdoor summer movie series - Page to Screen - and a series in partnership with The Independent. We are increasing our social media presence as well.

7. Why the big increase in this project budget for next fiscal year?

With the growth of the community, the library is working to become more of a community resource. We are collaborating more with local organizations and have extended programming to BASE. While this extension of programming happened faster than we planned, we were talking to BASE about having library programming there prior to our hour change. We have added an additional storytime in response to Morningstar needing to be closed on Fridays. We are hosting an outdoor summer movie series and a movie series at The Independent for the whole community (and any visitors that want to come). We are working to increase programming to build community amongst the retired community members and the families with toddlers. We are continuing our summer reading programs and author visits. We have added an author visit, so we will have 3 in 2022. We are also exploring establishing a library district which will take additional funds for FY23. We have also increased the salaries in the library in response to the rising cost of living in Big Sky. We are also increasing our digital library offerings as those are being checked out much more.

Project Name: Library Facility Improvements – Prep

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?

This project falls under a need that was taken out of the 2022 Update, but was in the original plan. Facilitate placemaking and enhance the community's assets through planning, design, and management of public spaces.

2. How has the scope of this project changed since your arrangement with the school may be changing?

The scope has grown since our arrangement with the school is changing. We are exploring more options for improvement that we hadn't considered before.

3. The project application indicates that this is a one-year project based on the start date of 7/1/22 and the end date of 6/30/23. Based on other information in the application it is our understanding that this is the first phase of a multi-phase, multi-year project. What is the anticipated completion date of all phases of this project?

With the scope of this project increasing, we do not have a solid end date. Based on our current understanding and knowledge, it could be a 5 year project. That is subject to change as we learn more.

Project Name: Library Copier Replacement

Project Questions:

1. What is the lifespan of the deliverable provided in the application?
 - a. Purchase a new copier

Our current copier was purchased in 2012. With the changes in technology, we anticipate the copier lasting at least 5 years.

2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?

Advocate for Businesses and Non-Profits to Partner and Collaborate

3. Have you investigated any other grants to come to the table with matching funds? If no, why and if yes please provide details.

We have not explored other options. This is a service we provide to the community to keep printing costs at cost and felt that this infrastructure request fit within the Resort Tax funding guidelines.

If the copier is used by the Teachers in the school, have you asked for any funding from the school district?

We have not asked the school for funding for the printer as it is a library service we provide to the community independent of the school.

4. Have you investigated leasing a new copier and making it part of your operating expense? It is nice to have the maintenance contract with a lease.

We have a maintenance contract with our current copier and plan to have one with the new purchase. Since we have purchased the printer/copier in the past, we did not explore leasing options.



FY23 DISTRICT QUESTIONS

Sponsor: Gallatin County Sheriff's Office (Big Sky Search and Rescue)

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Jason Revisky, Mark Bradford, Captain Scott Secor
 - b. June 9: Jason Revisky, Mark Bradford, Captain Scott Secor
2. Does your organization seek funding from sources outside of the BSRAD boundary? Yes, tax funds the vast majority of Search and Rescue operations, both in the Big Sky area and Gallatin County as a whole.
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? We are lucky that Search and Rescue Volunteers come from all sectors of the population and we have a strong and committed group of volunteers to help the organization.
4. Does the Sheriff's Office intend to continue to request Resort Tax funding on behalf of Big Sky Search and Rescue? If so, we should explore including this in the interlocal agreement. The intent is to modify the interlocal agreement once the current 3 year cycle ends, and including SAR will surely be part of the discussion.
5. What is the status of the Big Sky Search and Rescue Non-Profit now that the County is taking over the Resort Tax request? BSSAR INC does not serve in an operational role in SAR. The non-profit still exists largely as an equipment owner and club until assets can be transferred over to GCSSAR in the future.
6. What is the biggest post pandemic impact on community health & safety? SAR mission numbers have increased over the last few years, potentially due to the pandemic with folks wanting to get outside in the fresh air. The pandemic has not affect SAR operations directly.
7. Please explain the organizational structure between Search and Rescue and the Sheriff's Office. SAR is a division of the Sheriff's Office. The chain of command is Sheriff, Undersheriff, SAR Captain, Big Sky Section Manager, then volunteers.
8. Please share what benefits you have gained by merging our Search and Rescue efforts under the Gallatin County Sheriff Umbrella? Big Sky Search and Rescue operations have always occurred under the authority of the Sheriff. The change has been to establish organizational structure, a training plan, operational continuity with the other Gallatin County Sheriff Search and Rescue Sections, introduction of standards, policy, and procedure.
9. What other funding does our Search and Rescue operations receive outside of the requests you ask of BSRAD? All Gallatin County SAR operations are primarily funded through a dedicated tax levy to Gallatin County. This includes the personnel costs for 3 full-time staff that manages all SAR operations, facility costs, operating costs (fuel, mileage reimbursements to volunteers, a majority of the equipment and capital stock, and admin costs, such as insurance.)
10. Please provide year over year call volumes for the last 5 years.
2017 – 102

2018 – 101
2019 – 108
2020 – 115
2021 – 134

Project Name: Search and Rescue Trainings

Project Questions:

1. Please explain the indirect costs (Administration) listed on the project budget when this project is classified as “Programming”. The Template lists Training in the Administrative Category rather than programming, although we would also classify the training as programming or operations. We were trying to follow the template.
2. What are the average years of service by your SAR volunteers? 7 Years as a whole. In the Big Sky Section the average years of service is approximately? 8 years
3. Why the significant increase each year in FY24 and FY25? These increases are projected costs to provide the same trainings requested in FY 23, but taking inflation, increased equipment and material costs, and increasing volunteer numbers into account.
4. Have either of the Counties agreed to fund any part of this? Have you asked? If not, why? Gallatin County funds a vast majority of SAR costs, both in Big Sky and throughout the County. The goal is for the Interlocal with the Sheriff’s Office as a whole will be modified in the near future to encompass the SAR costs. This would help to distribute certain costs more appropriately.

Project Name: Search and Rescue Equipment

Project Questions:

1. Have either of the Counties agreed to fund any part of this? Have you asked? If not, why? Gallatin County funds a vast majority of SAR costs, both in Big Sky and throughout the County. The goal is for the Interlocal with the Sheriff’s Office as a whole will be modified in the near future to encompass the SAR costs. This would help to distribute certain costs more appropriately.
2. Why the significant increase in FY24? The primary reason for the large increase in FY 2024 is because the Big Sky Command Vehicle is in line for replacement that year.



FY23 DISTRICT QUESTIONS

Sponsor: Gallatin Invasive Species Alliance

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Jennifer Mohler, jen@gallatinisa.org
 - b. June 9: Jennifer Mohler, jen@gallatinisa.org
2. Does your organization seek funding from sources outside of the BSRAD boundary?
Yes, we pursue grants from any source we can find: State & local government, foundations, organizations, and direct public support.
Since 2004, the Alliance has received the following funding (as of 5-18-22):
 1. Resort Tax: \$537,986
 2. State & county grants, foundation awards, and fundraising: \$392,237
 3. In-kind*: \$732,237

*A significant portion of in-kind represents on the ground management of noxious weeds (e.g., \$87,184 in our HOA program and \$138,745 in bighorn sheep habitat treatments) that would not have happened without the Alliance's efforts.

The Alliance has always worked diligently to source funding for our programs with the resources we have. Three points for your consideration:

1. Leveraging partnerships and pursuing additional funding requires staff time.
2. Funding specific to "invasive species" is very limited (both in sources and dollars) and highly competitive. To be blunt, the Alliance often scores low or is rejected as our competitors are more in need (i.e., ranching/agricultural communities) and our project area is a well-known affluent community.
3. Funding available for invasive species projects does not provide much, if any, support for staff. While the Alliance has been successful in getting grant awards, a limited amount can be used for staff. Without adequate funding for staff, the Alliance is constrained in the pursuit of other funding.

- How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?

The Alliance board recently approved a modest increase in the hourly rate of our sole contracted part time staff. However, that was prior to the rise of inflation and gas prices. There is a real danger that without competitive compensation, the Alliance will be unable to retain contracted staff. Staff retention is critical to the continuity and execution of our programming, especially since we have only one (part time).

- What other sources of funding from the Big Sky Community have you explored?

The Alliance applies for funding from local foundations (YCCF, SPCF, MCF) and pursues sponsorships and donations from multiple local business for events and fundraisers. We are keen to do more, but lack of staff capacity limits our ability to pursue much else.

- Your request for FY23 was projected to increase 20% from FY22 award, however came in 37% of an increase over last year, what changes are accounting for this significant growth?

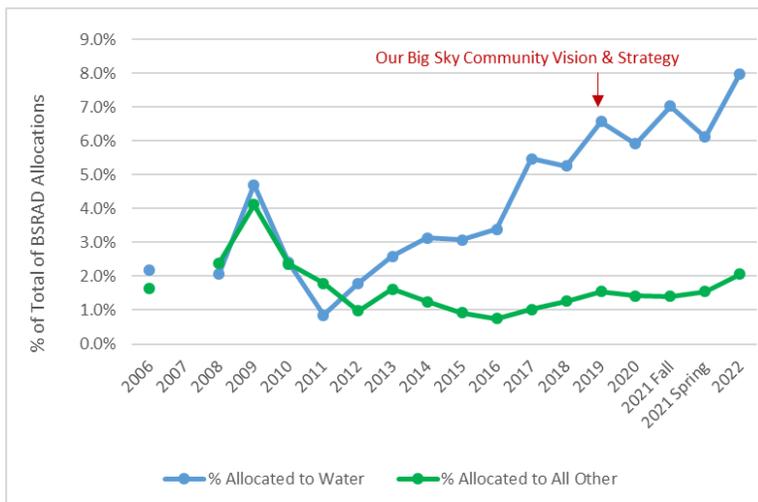
The request is a continuation of our funding requests that mirror the growth and development in our community and corresponding threats to our natural resources. The following shows the history of the Alliance’s ask and BSRAD awards.



The history of GISA requests (on the left) represents our effort to address the real and growing threats and impacts to our natural resources due to development, tourism and recreation.

Since 2015, awards have been less than requests except for FY 2021.

Below is a history of RT funding for natural resource conservation.

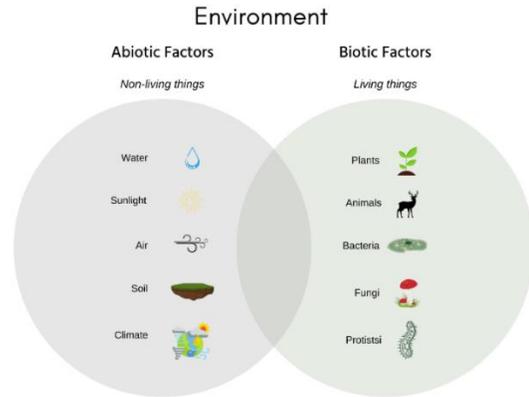


RT allocations have favored water over land resources by 3 to 1. (data sets for this graph have been provided to RT staff for transparency).

The discrepancy is not consistent with Big Sky’s Conservation Strategies, which place a premium on *all* natural resources, not just water.

A tenant in ecology is that everything is connected. Negative impacts to the biotic community (i.e., plant communities) can affect the abiotic community (i.e., water quality and quantity) and vice versa. Thus, when the natural resource concerns are not addressed as a whole, conservation efforts cannot be fully realized.

Big Sky’s Conservation Strategies Document: “...growth in this natural environment will create issues that require the application of clear and concise policies. We should work to protect habitat, wildlife, movement corridors, and scenic vistas... Because above all, Big Sky is in part defined by the imprint that its natural environment leaves on everyone who spends time here. That relationship demands creating and maintaining conditions in which people and nature can exist in harmony.” (pg 20)



Since 2006*, Resort Tax has allocated more than 3 times the amount to water vs. all other natural resources:

*2007 #'s not included as not on website

Water: \$3,233,294

All other natural resources: \$1,034,795

The inequity is manifested in the Alliance’s restricted capacity and ability to address the explosive growth (in development and recreation) and corresponding threat that invasive species pose to our community.

Invasive species are a real and present threat to:

1. The environment:
 - Yellowstone National Park identifies invasive species as the second biggest threat the park faces behind climate change.
 - A 2019 study found that the introduction of invasive species has been the primary cause of plant and animal extinctions over the past 500 years (Blackburn, Bellard & Ricciardi, 2019, *Frontiers in Ecology and the Environment*).
2. The economy: Invasive species have shown to significantly diminish recreation values.
 - \$4.4 million in lost recreation revenue in Colorado (2014 study by Colorado State University).
 - \$30 to \$40 million in lost recreation revenue over a five-year period in Nevada (2005 study by University of Nevada Cooperative Extension).
 - A 2016 study by the University of Montana estimated the economic impact of the month-long Yellowstone River closure due to fish die-off from a parasite known to cause proliferative kidney disease was between \$360,000 and \$524,000. The parasite has been

found in seven other rivers in Montana, including the nearby East Gallatin and Madison Rivers.

- Montana Office of Tourism and Business Development bulletin (6-19-19): “Invasive species can impact the quality of the outdoor experience both for residents and our 12.5 million annual non-resident visitors. The Montana Office of Tourism and Business Development are asking for your help to educate staff that interface with visitors, as well as visitors that come to Montana on the threats of invasive species and how to be proactive against them.”

In 2020, the Alliance answered RT’s call to reduce grant asks in light of the pandemic and proactively slashed our request by two-thirds, requesting “survival only” funding.

We are asking BSRAD to equitably fund conservation projects that protect our natural resources.

6. Are your other funding sources also growing by 37% over FY22?

No, but they are growing. The Alliance pursues every and any opportunity we possibly can. Opportunities to fund invasive species work are very limited and competitive. Pursuit of other funding sources requires staff time.

7. Is there anyone doing similar work as you within the Gallatin Valley? If so, how do you partner since much of your audience is transient between both Gallatin Valley and Big Sky? If not, why not?

The Alliance partners with both the Gallatin County Weed District (GCWC) and the Gallatin Conservation District (GCD).

Gallatin County Weed District: Two of the three staff are on our board and are a cornerstone to everything we do. The GCWD views our organization as an extension of their office, as any landowners’ inquiries from the Big Sky area are sent our way and vice versa. We collaborate on all 5 projects with the GCWD, bringing county resources to the Big Sky community. In just one of many examples, the Alliance has leveraged our partnership with GCWD resulting in over \$21,300 worth of noxious weed treatment for the benefit of landowners in Big Sky in our HOA program.

Gallatin Conservation District: The GCD has a broad portfolio of conservation programs that complement GISA’s work. In the past year, we have partnered with the GCD to host a small acreage pasture management class (funded entirely by a grant from the Montana Association of Conservation Districts) that served 26 households/46 participants representing 27,557 acres. This included 2 fall small acreage tours, 5 online classes, and 2 spring small acreage tours. In addition, the GCD partnered with us to apply for and receive a \$10,000 grant for our education trailer through the DNRC 223 grant program. We would like to do more with the GCD, as they have a robust Art in the Garden and pollinator program which we’d like to replicate at Crail Gardens, but lack capacity to do so.

8. What plans do you have to decrease your reliance on BSRAD?

In order to decrease our reliance, the Alliance needs the capacity to do so, which includes strategic planning, capacity building, and development/fundraising planning. For years, part of

our RT requests has included funding for these important aspects of a functional non-profit organization, but these requests have not been awarded. Pursuit of these efforts remain a high priority but requires funding and staff time.

We are exceedingly proud of our accomplishments with one quarter to half time contracted staff. To the right is a history of FTE per fiscal year.

The conservation work executed by the Alliance is a direct response to the growth, development, tourism and recreation in this community.

Natural resources are the economic driver of this community.

Therefore, if this community is truly dedicated to protecting what makes it so special, then Big Sky must make a commitment for ongoing funding of conservation works.

| FY | FTE |
|----|------|
| 12 | 0.2 |
| 13 | 0.24 |
| 14 | 0.34 |
| 15 | 0.3 |
| 16 | 0.29 |
| 17 | 0.45 |
| 18 | 0.39 |
| 19 | 0.57 |
| 20 | 0.47 |
| 21 | 0.53 |

Project Name: Clean Recreation Project

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.

Yes, promoting clean recreation practices to protect and preserve our natural resources is a significant component of Economic Development because natural resources are the economic engine of Big Sky.

2. What is the other public funding outlined in the project budget for this project?

Public funding includes a DNRC grant (will apply for \$22,227 Dec/Jan of 2023) for our Clean.Drain.Dry. in the Upper Gallatin project, foundation funding (yet to be applied for) for our PlayCleanGo (\$7,500) video production and promotion, and partner/project assessment.

3. Please differentiate between the two projects Invasive Species Education and Clean Recreation?

Our Clean Recreation project is rooted in two nationally established clean recreation campaigns. Recreation leads to invasive species introduction and spread, threatening wildlife habitat, local trails, and rivers. In response, the Alliance promotes established clean recreation programs (PlayCleanGo and Clean.Drain.Dry.) via multiple media platforms, trailhead and highway signs, and at events.

Our Invasive Species Education project focuses on collaborative efforts with partners and organizations on an array of projects that are designed to increase awareness of the significant impacts of invasive species and provide individuals and organizations with the knowledge of how to effectively manage them. Through these projects, the Alliance creates and disseminates

educational materials, and provides educational opportunities via local kid's camps, farmers market, guided hikes, classes, and more.

4. What is the geographic scope of this project & who is the target audience?

The geographic scope is the Upper Gallatin Watershed, with a focus on Big Sky.

Big Sky is a destination community. People from Big Sky travel out, and people from outside Big Sky travel in. The primary mechanism of spread for invasive species is transport via humans, their vehicles, and the gear they use and transport from one area to another. Our target audience is every single person who lives, works, recreates, and visits the Upper Gallatin Watershed.

Project Name: Invasive Species Education

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.

Yes, educating both locals and visitors about invasive species serves to protect and preserve our natural resources, which is a significant component of Economic Development because natural resources are the economic engine of Big Sky.

2. What makes this project different than the Clean Recreation regarding the % of funding available through other public funding sources?

The Alliance can pursue DNRC Aquatic Invasive Species (AIS) grants for our Clean Recreation project. The AIS grant is well funded and we have an established, good working relationship with the DNRC.

The only state grant program available for invasive species education is the Montana Noxious Weed Trust Fund. We have applied almost every year, and have been funded in 2005, 2006, 2009, 2010, and 2016. This state-wide program has become exceedingly competitive, with decreasing amounts for education. It does NOT provided funding for staff, and we score low as our project area is a well-known affluent community whereas our competitors are more in need (i.e., ranching/agricultural communities).

3. Where does your other public funding come from on this project?

The other funding comes from Gallatin County, Madison County, and local foundations.

In November of 2021 the Alliance began to pursue funding to build an education trailer. Since then, we have secured \$40,500 for the purchase and build of the education trailer. This is an example of our tireless effort to explore every funding opportunity possible. In this year's RT ask

is \$5,000 earmarked for the trailer. If funded, that means the Alliance matched the RT \$1 with \$8 for the education trailer.

Project Name: Crail Gardens Programming

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
Yes, we are collaborating with the Arts Council on our Big Sky Wildflower Festival and have plans to develop an “Arts in the Garden” program (the potential is exciting!) but need staff capacity to implement.
2. How is this specific program different than your invasive species education program?
Invasive Species Education project focuses on invasive, non-native species. Crail Gardens focuses on native species, the benefits of using them in the landscape (water conservation, wildlife habitat, and preserving our historic landscape) and the ecosystem services they provide (clean water, clean air, healthy soils, drought resiliency, etc.). Crail Gardens “bookends” invasive species in terms of ecosystem education. The gardens represent enormous potential for educating and inspiring the community, where people can see and experience conservation in action. It’s also an example of local partners working together to demonstrate solutions to important environmental issues that our community faces.
3. How can you partner with the Crail Ranch Committee to create awareness around this garden through their strong volunteer program?
We do work with the Crail Ranch Committee to create awareness, expand activities, and tap into their volunteers. As we’ve stated before, collaboration requires capacity. Thus, to increase our partnering abilities, we need more capacity to fully exploit the partnership.
4. Do any of the partners that helped build this garden support the ongoing maintenance and education? Yes.

Project Name: Landowner Stewardship Project

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
Yes. There have been many situations where invasive plants have been shown to damage real estate values. In the western plains, leafy spurge infestations were found to reduce the

property value of rangelands by as much as 83% (Weiser 1997). Not only do they affect property values, but once invasive species are established on lands, it costs time and money to manage them. Thus, invasive species can impact Economic Development.

2. How many landowners have treated for invasive species in Big Sky in the last year?

We do not track treatment by individual landowners because of privacy concerns and lack of staff capacity. The Alliance does track each site visit inspection, but does not maintain a record of every conversation, phone call or email with landowners. As part of each site visit, recommendations are provided for managing invasive species, and many of the landowners follow up by treating their noxious weeds in some fashion. Important points:

1. Only the owner of the land can legally treat noxious weeds on that property.
2. In 2021, we inspected 83 properties (358 acres). Since 2008, we've inspected 887 properties (11,533 acres).
3. The Alliance coordinated an HOA treatment day in 2021 that impacted 51 acres of open space.
4. Invasive plant management requires ongoing treatment for multiple years; thus it is reasonable to assume that most of the landowners we've assisted continue to manage noxious weeds on an annual basis.

3. Have you considered an incentivization as a strategy to encourage landowners to treat for invasive species?

The Alliance did once have a cost share program, but previous RT boards did not want to fund it, thus we shifted strategies and now direct landowners to the corresponding County cost share programs, which is a much better fit.

The best incentivization is offering free assistance. Having adequate funding to provide this assistance translates directly to improved land management by individual landowners, which creates the best outcome for the Big Sky community.

We are always open to new ideas!

4. Do HOA's or landowners pay any fees for the service provided through this program?

No, and it's critical that they don't. Any barrier (i.e., fee) will reduce participation and negatively impact invasive species management in our community.

5. Are these landowners different than those you reach in your Invasive Species Education programming?

Yes...and no. While we may meet landowners through our IS Ed program (e.g., at Farmers Market), this project includes on-site property inspections, ensuring that the landowner knows exactly what IS they have and then we provide the information on how to manage them. The IS Education project does not include site visits, but rather focuses on community events, classes, etc.

6. Are there efficiencies that can be created through all these various education and awareness programs?

Because our funding has consistently fallen short of meeting the need, efficiencies have already been maximally exploited by necessity.

7. What HOA or HOAs have you worked with in the past 3 years and what HOA or HOAs are you working with for the upcoming fiscal year?
From 2018-2020 we worked with Ramshorn HOA and Antler Ridge. The program is designed to work with an HOA for 3 years to build a community ethos around IS management so that by year 3 residents see tangible results and are inspired to continue the work. In 2021, we began working with Porcupine HOA. Because of COVID and funding cuts, we only had capacity to work with 1 HOA. We will continue to work with Porcupine HOA in 2022 and 2023 and look to engage other HOAs to the extent possible.
8. How do you choose the HOA or HOAs you work with? HOAs are selected when individual landowners express interest and take action to reach out to residents in the HOA and help with planning and implementation. We are always keen to expand outreach and get more HOAs on our list, but that requires more capacity to do so.
9. Are there any requirements for what landowners you work with on this project?
Just to be clear about the two programs within the Landowner Stewardship Project:
 1. Landowner Assistance – The Alliance provides free assistance to any landowner within our project area via property inspections and consultation via phone, email, etc. All they have to do is reach out to us and we'll provide assistance.
 2. HOA (Habitat Owners Association) Program – The Alliance partners with HOAs and the Gallatin County Weed District to enhance wildlife habitat in HOA open space by leading an invasive species management effort for a three-year period. The goal is to assist the HOA with education and technical assistance to kick start habitat improvement. HOAs must be within our project area and have a dedicated point person to lead and manage fellow residents.

Project Name: Invasive Species Management on Wildlife Habitat

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
Yes, conserving wildlife habitat aligns with Economic Development because the natural resources that provide food, cover, and places for wildlife to rear their young are the economic engine of Big Sky.
2. What is the most persuasive invasive species on wildlife habitat?
I am assuming it should be “pervasive”. This is a very complex question and truly requires a conversation. I'll begin with basics and am always happy to discuss further.

- Most abundant invasive plant species in Big Sky (ranked in order) in 2021: Canada thistle, hoary alyssum, houndstongue, musk thistle, oxeye daisy (according to property inspection records from 2021).
- Most damaging to wildlife...that depends on the species. For trout, it could be *Myxobolus cerebralis*, a microscopic parasite, which could devastate the Gallatin fishery. For elk, it might be houndstongue, as it is toxic and spreads easily via burs that stick to fur. The biggest threat may be new invaders, like orange hawkweed, which have been found in isolated patches, but because the environment is ideal for this invasive plant, the potential to dominate the landscape is large.
- At the end of the day, any plant, animal or pathogen that exhibits invasive qualities can cause serious and irreparable harm to our ecosystem and wildlife.

Invasions by exotic species have been cited as one of the leading causes of environmental change and decreases in biodiversity (Vitousek et al. 1996).

3. Are any of the wildlife conservation NPO's in our region partnering with you on this work?
Yes, we work with Madison-Gallatin Trout Unlimited, Wild Sheep Foundation and most recently have built a connection with the Rocky Mountain Elk Foundation. There are more NPOs out there, and we'd love to do more, but lack capacity to do so.
4. How many volunteers do you normally have participating in your community weed pulls?
Gallatin River Weed Pull 13-year average is 34. Big Sky Community Park Weed Pull 11-year average is also 34. We do host miscellaneous weed pulls, primarily at the request of another group (like Rotary or Montana Wilderness Association), on occasion. That average is 23 people per event.



FY23 DISTRICT QUESTIONS

Sponsor: Gallatin River Task Force

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Kristin Gardner: kristin@gallatinrivertaskforce.org, Emily O'Connor: emily@gallatinrivertaskforce.org
 - b. June 9: Kristin Gardner: kristin@gallatinrivertaskforce.org, Emily O'Connor: emily@gallatinrivertaskforce.org
2. Does your organization seek funding from sources outside of the BSRAD boundary? Our organization does seek funding from sources outside of the BSRAD boundary. Examples include multiple grants from the MTDEQ, MT DNRC, license plate revenue, Gallatin and Madison Counties, numerous foundations, businesses, nonprofits, and individual donors.
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? We have been and are amid adapting to the current statewide and local cost of living increases and the national workforce crisis in numerous ways. We have provided salary increases, more flexible work schedules, and commuting stipends for current staff. We are in conversations with other organizations about potential future opportunities to share staff positions. In addition, we are and have been considering outside contractors to fill staffing gaps.
4. Please explain the purpose of Restricted and Unrestricted Reserves outlined on the Sponsor Efficiency Worksheet.
 - a. Restricted Reserves: Grants or capital campaign donations that we have received in full but have not been utilized and are restricted for projects. This includes grants from the: Moonlight Community Foundation, Spanish Peaks Community Foundation, Yellowstone Community Foundation, American Rivers - restricted for Middle Fork Restoration, Operations, and Wild and Scenic advocacy, respectively. Campaign dollars are restricted for specific project work on river access restoration, operations, watershed monitoring, and education and outreach.
 - b. Unrestricted Reserves: 3 months of operations
5. Previous Actual and Current Budget both result in an operating loss. Do you anticipate this to be ongoing and how are you making up the difference? Our net operating losses are a result of the method auditors recommended that campaign pledges were documented in our bookkeeping software. Most of our campaign pledges were multiyear and were realized in total the year the pledge was made- which for most were in either 2018 or 2019. Since we are still paying for projects and operations that are funded by campaign dollars, we expect to be operating in a loss until we spend out these campaign funds.

6. On the LOI you listed \$600,000 as your “FY24 Predicted Request” and \$600,000 as your “FY25 Predicted Request”. When cross referenced with project data the total projected amounts come to \$948,340 in FY24 and \$947,678 in FY25.

- a. Please explain the discrepancy in predicted requests for both FY24 & FY25: The main discrepancy in our estimate was for our river access projects. We completed a restoration strategy with the Forest Service in the early spring after the LOI was submitted and before the application was due that provided a timeframe and budget for upcoming project work. The board did not approve our FY23 budget until March 15th so there were some additional smaller shifts in our request.

In general, we have had and will continue to have, discrepancies in our future requests for several reasons: 1) we have developed three new plans over the past year and a half to guide future priorities with estimated project costs: Gallatin River Restoration Strategy, West Fork Nitrogen Reduction Plan, and a Water Conservation and Drought Management Plan. The estimated project costs in these plans are rough estimates. For restoration projects, we cannot hone in on the actual costs until we have final designs and because our project work relies heavily on multiple partnerships, landowner cooperation and in the case of the Forest Service, public input, we need to go through multiple phases of designs for these projects. From experience, we know that the actual project activities and associated costs can vary significantly from the conceptual phase of a project to the final phase. Furthermore, because we do not own land and all projects rely on partnerships with landowners, we do not have as much control as some other entities might have on the timing of the projects. Predicting project costs a year or two ahead are our best educated estimations based on current information of what projects we are fairly certain will be moving forward.

- b. Please clarify the organizations predicted requests for both FY24 & FY25: The budgets submitted with our project applications contain the most up to date requests.

7. Please describe your sources and plans for Other Public Grants, Private Donations and Fundraising.

- a. Other Public Grants: MT DEQ 319 Funding, MT DEQ Water Quality Monitoring, Madison County: annual request for capital campaign pledge and water budget analysis, Gallatin County: water budget analysis. We routinely research appropriate grants to fund our projects and operations.
- b. Private Donations: we receive private donations through private foundation grants (local foundations), membership program, our annual fundraising event, an annual appeal, Give Big Gallatin Valley, and other unrestricted donations.

8. Your request is 10% less than what you had projected last year, what is different that has changed this amount?

A few reasons as to why our request is less than projected last year:

- Our project work shifted because of circumstances outside of our control for three projects:
 - An HOA board member disagreed with a board decision made in their absence about a project design, so we had to revise plans,
 - The Forest Service could not complete the NEPA for a project, so it is delayed, and

- Feedback from one landowner moved a project location to another landowner's property and getting feedback from this out of state landowner has taken longer than expected.
 - We finalized our water conservation/drought management plan with updated estimated costs
 - With better-than-expected fundraising through covid, we felt we could reduce our operations request more than predicted
 - With severe drought conditions and exploding growth, we prioritized two studies to provide critical information for holistic water supply management to ensure adequate drinking water for our community and streamflows to support aquatic life.
9. All your projects have a payroll and benefits allocated to them to complete the projects and all those payroll expenses are split between BSRAD and other revenue streams, just curious what is the total percentage of your total organizational payroll & benefits that you are requesting to BSRAD versus funding through other revenue streams? BSRAD: 30%, Other Revenue Streams: 70%
10. What plans do you have to decrease your reliance on BSRAD? We will continue to build and expand our other revenue streams as we have been continually doing over the past few years.

Project Name: GRTF Operations

Project Questions:

1. What are the lifespans of the deliverables provided in the application?
 - a. Scientific data, reports, and monitoring of the watershed to ensure that the Gallatin is protected year-round: data 50+ years, reports: 5 years
 - b. Middle Fork 5 restoration projects: the typical lifespan of a restoration project is 50-100 years.
Water budget needs that will inform for infrastructure in FY23: the results have a lifespan of approximately 5 years, but the results can be updated with minimal effort and cost by rerunning the analysis through the developed framework
 - c. Water Conservation Programs and Water saving rebate initiatives that will be done throughout FY23: Once a water-efficient fixture is installed the water savings will be realized for the life of the fixture.
 - d. Educating our community about drought resiliency, vital infrastructure needs and the need for water conservation: optimistically the remaining lifetime of a human, so 1-70 years.
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? This project supports all the initiatives under the strategy *Our natural resources are protected and enhanced for future generations*.
3. Please provide the metrics for the goals listed on the application.
 - a. Our operational goals sustain our organization and enable our work on projects, goals and deliverables that are mentioned throughout the remainder of this application. Without this support, our general project costs would skyrocket, and project cost increase We aim to have a fully staffed team that can take on capital project work for

what a municipality would generally do to fund water conservation and restoration projects.

- i. Metrics include 6 staff members and 13 board members, a new organizational annual work plan, audited financials, and an updated fundraising plan.

Project Name: Watershed Monitoring and Assessment

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. Public Works: our monitoring projects inform water and wastewater management priorities and decisions. For example, our streamflow gauges and nutrient data are used in wastewater reuse planning and permitting.
 - b. Health & Safety: our groundwater monitoring project work will identify potential sources of contamination to our drinking water supply.
2. Is there an end date to this research? Some research is to understand long-term trends with no end date and some has an end date. Since the algae bloom in 2018, our monitoring has increased to inform the MT DEQ in their decision as to whether to list the Upper Gallatin as impaired. This will prompt a Total Maximum Daily Load Development mandated by the Environmental Protection Agency. This algae study will end in FY24.
 - a. How will the findings be used?
 - i. To inform the MT DEQ decision on whether to list the Gallatin as impaired which will then require TMDL development.
 - ii. To guide wastewater management/permitting for our two water and sewer districts
 - iii. To understand long-term trends in streamflow and impacts of growth and climate change so that we can prioritize and adjust water conservations and wastewater reuse as needed
 - iv. To identify if elevated nutrient concentrations in groundwater are from a wastewater source so that we can mitigate and advocate for improved wastewater treatment
 - v. Identify drought conditions that will trigger community actions at the district and HOA scale
 - b. How will this research inform decision making and planning? Included in answer to part a.
3. How is this work funded on other sections of the Gallatin, the Madison, and the Jefferson? Like our monitoring programs, monitoring in other watersheds is funded through a combination of diverse funding, including municipal government, conservation districts, and state agencies, and relies heavily on volunteer participation.
4. The application indicates an end date of 6/30/22, which is before FY23, please validate. The end date is? 6/30/23
5. Will data collected include phosphorus levels and water temperature? Yes
6. Who else uses the data you collect through this project to make informed water decisions within our region? The Montana Department of Environmental Quality, Montana Bureau of Mines and Geology, the Big Sky Water and Sewer District, the Gallatin Canyon Water and Sewer District, the Montana Department of Natural Resources and Conservation

7. What change are you anticipating that will cut this request to BSRAD in half moving forward? A few of the line items this year were for one-time requests like installation of a stream gauge on the Middle Fork and groundwater tracer monitoring to identify nitrogen sources to the meadow aquifer and the canyon aquifer. At the time of application submission, we did anticipate that the MT DEQ algae/nutrient assessment would be completed in FY23, however the DEQ has since added another year to this project which may change our FY 24 & FY 25 requests.

Project Name: Middle Fork Restoration

Project Questions:

1. The project budget uploaded to the application and the LOI show different amounts for the request. What is the amount of the request for this project? The amount of the request is \$38,556 listed in the application budget. We received updated cost estimates from our engineer therefore we reduced the amount of the request in the application.
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. Public works/infrastructure. The restoration techniques utilized in this project will improve natural groundwater supplies, the source of our drinking water in Big Sky. Improving natural water storage reduces the need to develop new supplies and expand water infrastructure. Additionally, if the stream is delisted from the 303d list of impaired streams it could make the permitting process for infrastructure projects less stringent.
3. Where will site work be taking place this fiscal year? The Middle Fork Project 5 site is located in the open space/parkland of the Aspen Groves and Antler Ridge Subdivisions.
 - a. Are there future sites for site work? Yes, the Middle Fork Restoration Plan includes 5 restoration sites total. The funding request for this year only includes work on project 5 but future requests may include other sites as it is our goal to complete all 5 restoration projects pending landowner coordination.
 - i. Project 1 - Upper Middle Fork West Fork Road Sediment BMPs
 - ii. Project 2 - Upper Middle Fork West Fork Riparian Buffer Enhancement around Lake Levinsky
 - iii. Project 3 - Middle Fork West Fork Restoration downstream of Lake Levinsky (complete)
 - iv. Project 4 - Middle Fork West Fork Restoration in Lone Moose Meadows
 - v. Project 5 - Middle Fork West Fork Restoration in Aspen Groves/Antler Ridge
 - b. Where and what work has already been completed? Work has been completed at Middle Fork Project 3, below Lake Levinsky Dam.
4. The project application indicates that this is a three-year project based on the start date of 7/1/21 and the end date of 6/30/24. Based on the projected requests outlined in the application and the project budget it is our understanding this project extends at least into FY25. What is the anticipated completion date of all phases of this project?
 - a. Phase 1: Planning, preliminary design (FY22, completion date June 30, 2022)
 - b. Phase 2: Final Design, permitting, project bidding (FY23, completion date June 30, 2023)
 - c. Phase 3: Construction (FY24, completion date October 30, 2024)

- d. Phase 4: Monitoring & maintenance (FY25, completion date June 30, 2025)
5. Will adjacent landowners provide funding for this? Yes, we have worked with both homeowners' associations (HOAs) and Lone Mountain Ranch (LMR) on funding requests. The HOAs have sent emails to their members encouraging contributions to the project. That request has been successful and so far, we have raised private donations from HOA members. We will be launching another individual donor fundraising campaign as we get closer to project implementation. Additionally, LMR will be contributing financially toward the project via their foundation.
6. Is the land where this specific bridge/trail/bank erosion project will take place owned by LMR, and if so, are they contributing anything to this project?

The land is not owned by LMR. The land is owned by Antler Ridge and Aspen Groves HOAs. LMR has trail easements on the property for their cross-country skiing operation and guests. LMR will be contributing financially to the project.

7. Please explain the increase in the FY24 and FY25 budget in BSRAD funding but no increases in other funding sources.
Our FY24 forecast includes a significant increase in grant and event funding for the project. We have the most success fundraising for our projects when they are in the implementation phase. In FY24 we projected BSRAD funding covering 30% of the project costs and 70% coming from private donations, grants, and events. FY25 funding will be for monitoring and design work on other Middle Fork project sites. Funders are less likely to contribute to the early phases of project work and typically like to fund implementation therefore we have a more difficult time finding diverse funding sources during this phase of project development, but we will certainly work towards improving this by growing our pipeline of unrestricted funding.

Project Name: West Fork Nitrogen Reduction

Project Questions:

1. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. Public Works: These projects aim to reduce nitrogen concentrations in the Upper West Fork and ultimately remove the West Fork from the 303(d) list of state impaired waters. This would allow more flexibility for the Big Sky Water and Sewer District for wastewater reuse in the West Fork drainage. Furthermore, one of the aspects we are exploring for the West Fork wetland treatment project is the potential to use this site for wastewater reuse. This would be beneficial for the district to add another option to their reuse portfolio and beneficial for the watershed because it would add another level of treatment to the wastewater and replenish groundwater supplies in the West Fork drainage, where most of the groundwater withdrawals are occurring.
 - b. Affordable Housing: Because affordable housing is largely dependent on water availability and wastewater treatment capacity, there is an argument that this work could benefit affordable housing.

2. Once the design is completed what is the expected completion date for site work?
 Chapel Spring: estimated Fall 2023
 West Fork Wetland: estimated Fall 2024 or 2025

3. The end date on the application (6/30/22) indicates that this project will be wrapped up before the start of the BSRAD FY23. Based on the projected requests outlined in the application and the project budget it is our understanding this project extends at least into FY25. What is the anticipated completion date of all phases of this project?
 - a. Chapel Spring: final design, permitting 6/30/23, construction 6/30/24
 - b. West Fork Wetland Treatment: TBD after this next phase of design

4. Will phosphorus levels also be addressed? Yes, wetlands also treat phosphorus; however, phosphorus levels are very low in our local streams and generally in the Gallatin mainstem. The state has listed the Middle Fork, West Fork, and South Fork as impaired for nitrogen not phosphorus, and nutrient limitation experiments that were conducted in 2021 indicate that algae growth in the Gallatin is limited by nitrogen not phosphorus. We are conducting another round of these experiments in 2022 to see if this holds true over different environmental conditions.

5. Can you provide a map of the area you are discussing?

Chapel Spring



TREATMENT WETLAND FOR NUTRIENT REDUCTION

Concept Plan
 Project Number: 210221
 February 23, 2022



West Fork



Project Name: Water Conservation

Project Questions:

- Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - Public works/infrastructure and economic development. This project could be recategorized under public works rather than recreation and conservation as it likely fits better in that category. Water conservation is the most cost-effective, expedient, and environmentally friendly way to thrive through drought and stretch water supplies. An outdated approach to meeting new water demands is to pull water from already-stressed river systems and aquifers, imposing significant financial and environmental costs. Water efficiency and conservation strategies help improve Big Sky's fiscal health and economic performance through reduced development costs, reduced infrastructure investments, reduced operating costs, and preservation of Big Sky's tourism economy.
- Are you working with HOAs to reduce lawn watering?

Yes, we are currently working with Big Sky Owners Association (BSOA) because they are the largest HOA with 2,300 properties encompassing 8,000 acres. Our work with BSOA to reduce lawn watering involves providing educational materials to the HOA and their members, providing marketing materials to help get the word out on outdoor rebate opportunities (i.e., irrigation audits and water-wise irrigation and landscape upgrades), and working with BSOA to upgrade their governing documents (i.e., CC&Rs and Design Regulations) to establish environmental best practices and actions that conserve water. Once we have fine-tuned our

outreach materials/partnership with BSOA we will be conducting outreach to other HOA's in the Big Sky area focusing on the largest HOAs first then smaller HOAs.

3. Are you working with developers to ensure new builds and remodels are implementing best practices and efficient fixtures to maximize water conservation?

Yes, like BSOA we have worked with developers (i.e., Quarry Subdivision) to incorporate language in their CC&Rs to establish environmental best practices and actions that conserve water. Additionally, we advocated that water conservation practices be incorporated into the Flatiron development during the Conditional Use Permit review process with Gallatin County. We were successful in this effort and conditions for subdivision approval include drought-resistant and native landscaping and water saving fixture requirements for indoor and outdoor fixtures that meet EPA WaterSense criteria. This next fiscal year, we have an intern who will be completing a research project on opportunities to adopt water conservation policies, ordinances, and regulations via HOA governing documents, planning & zoning, and subdivision review. Our goal is to develop recommended language and templates that local developers and community leaders can use to easily incorporate water conservation best management practices into the development approval process.

4. What role do any of the water providers play in this program? The Big Sky Water and Sewer District helps market the program via their website, customer billing, and at the district offices. The district also played a key role in providing data and helping to develop the Big Sky Water Conservation & Drought Management Plan which is guiding the program of work for the next several years. Other water providers involved in the development of the Water Conservation & Drought Management Plan, via attendance at several workshops and filling out a survey, include the Antler Ridge Community Public Water System, Ophir School Public Water System, Corral Bar Public Water System, Firelight Meadows Public Water System, Ramshorn View Estates Public Water System, Spanish Peaks Mountain Club Public Water System, and Yellowstone Mountain Club Public Water System.

- a. As the direct beneficiary of this program, are any of them making financial contributions? We are currently in conversations with the district about incorporating a water conservation line item into their budget that would support the Big Sky Water Conservation Program. We are starting with the district as the largest water provider, with the goal of engaging the other large water providers to contribute financially to the program and to help guide program delivery and results. Additional beneficiaries of the Water Conservation Program are Big Sky residents and businesses. Program education/outreach strategies inform community members on the ecological and economic benefits of efficient water practices and rebates provide financial motivators that result in both water savings (measured in gallons of water saved) and cost savings for individuals/families and businesses (up to \$4,000 combined savings for residential participants and even more savings for businesses). Other direct beneficiaries are our streams and rivers. Groundwater withdrawals from individual and community wells can have a significant impact on the availability of fresh water supplies and streamflows in the Big Sky area and downstream in Gallatin Valley.

5. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? Water conservation under the strategy to improve and maintain water & sewer infrastructure.

6. How will you track your water savings goal to share for next year? GRTF uses water savings “book values” to compute overall volume reduction for various conservation measures. For example, replacing a standard toilet with a WaterSense certified toilet saves on average 13,000 gal/yr. GRTF has book values for each of our rebate offerings, calculated in part by information collected in our rebate application form. Since there is no single water provider or regulatory authority, GRTF lacks the ability to develop an enterprise-scale metering program that truly quantifies water use and savings over time. However, we would like to continue conversations with the Big Sky Water & Sewer District and other key water providers regarding a central data sharing platform that would allow the water providers, GRTF, and other community leaders the ability to evaluate water demand annually, set conservation goals, and compute overall average annual demand per connection every year to help the community track progress.

Project Name: River Access Restoration

Project Questions:

1. The project budget uploaded to the application and the LOI show different amounts for the request. What is the amount of the request for this project?
The amount of the request is \$77,851 listed in the application budget. We received updated cost estimates from our engineer therefore we reduced the amount of the request in the application.
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. Economic Development: This project closely aligns with the goals of economic development by managing and supporting a positive visitor experience. According to the latest Big Sky economic report completed in 2019, Big Sky is an R destination, meaning that outdoor recreation is what draws visitors here and on what they choose to spend their money. These projects sustainably manage river-based recreation to ensure recreation can continue to be a staple of Big Sky’s vibrant economy.
3. What sites will be worked on this year? Porcupine/Beaver Creek, Portal Creek, Doe Creek, and several smaller river access parking sites. Lave Lake and Greek Creek will also be worked on but funding for those sites will come from other sources because those sites are outside of the Resort Tax District.
4. Which river access improvements will benefit the outfitting community, and have you solicited the outfitters for financial support for these sites? River access improvements at Porcupine/Beaver creek will benefit the rafting and horseback riding outfitters. Historically, outfitters like Geyser Whitewater and Gallatin River Guides have sponsored our annual fundraising event, Hooked on the Gallatin, which provides unrestricted funding to support staff payroll and project costs. Additionally, outfitters pay a permitting fee to the Forest Service to operate their businesses on federal land. Each year, through our Cost-Share Agreement with the Forest Service, a portion of the outfitter fees is paid to GRTF toward our river restoration projects.

5. The project application indicates that this is a one-year project based on the start date of 7/1/22 and the end date of 6/30/23. Based on other information in the application it is our understanding that this is the first phase of a multi-phase, multi-year project. What is the anticipated completion date of all phases of this project?

Porcupine/Beaver Creek is the farthest along as well as the river access parking sites. We are just beginning the early phases of the other projects.

Porcupine/Beaver Creek:

Phase 1: Planning, preliminary design (FY21 & 22, completion date June 30, 2022)

Phase 2: Final Design and permitting (FY23, completion date June 30, 2023)

Phase 3: Bidding & Construction (FY24 or FY25, completion date October 30, 2024/25 pending fundraising success and Forest Service National Environmental Policy Act (NEPA) review)

River Access Parking:

Phase 1: Planning, preliminary design (FY22, completion date June 30, 2022)

Phase 2: Final Design, permitting, bidding (FY23, completion date June 30, 2023)

Phase 3: Construction on first set of sites (4-5 sites completed per phase) (FY24, completion date October 30, 2024)

Phase 4: Construction on second set of sites (FY25, completion date October 30, 2025)

Phase 5: Construction on third set of sites (FY26, completion date October 30, 2026)

Portal Creek, Doe Creek, Lava Lake, Creek:

Phase 1: Planning, preliminary design (FY23, completion date June 30, 2023)

Remaining phases TBD

6. This project is critical, but also has some big-ticket price tags in the coming years for construction whereas your BSRAD future requests does not increase substantially, where do you project these additional funds will come from to complete these projects?
We will be developing a fundraising plan this year to strategically guide our fundraising efforts and will likely complete another capital campaign that funded the first two projects at Moose Creek and Upper Deer Creek. We will also tap into local grants as well as state and federal funding including but not limited to the Great American Outdoors Act and Forest Service Capital Improvement and Maintenance Funds.
7. If the ORW is obtained will this prohibit the project from happening?
Potentially, depending on the improvements and if a temporary discharge permit is needed. We will know more when the final design is complete, and we begin the permitting process. There is a lot of opposition to the current initiative pushing ORW for exactly this reason. The uncertainty of what ORW would mean for restoration projects of this nature is of great concern. While it is hard to believe that it will pass as proposed through I-191, we will know more in the upcoming months.

Project Name: Water Supply Resiliency Projects

Project Questions:

1. Please provide the metrics for the goals listed on the application.

- a. Provide Big Sky water managers and developers with management recommendations to enhance water supply resilience to drought
 - i. # of recommendations for water reuse options that benefit water supply
 - ii. # of recommendations for water conservation that benefit water supply
 - b. Provide Big Sky water managers and ski areas with future snowpack predictions to inform management strategies and future planning efforts
 - i. FY 23 metrics: # of snow measurements, # snow monitoring sites, model simulation of historical snowpack
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. Public Works: The information from these studies will directly inform water conservation and wastewater reuse planning.
3. Does the non-Resort Tax funding outlined in the Project Budget include support from water supply managers (Gallatin Canyon Water & Sewer District, Big Sky Water & Sewer District, Moonlight, Yellowstone Club, and others) and snowpack stakeholders (ski resorts, SNO, river outfitters, Forest Service, Fire Department, and others)?
 We are aiming to fund the water budget from public funds - BSRAD (50%), Gallatin County (25%) and Madison County (25%). Early on in discussions with stakeholders about this project, we discussed the benefit of the projects being funded through public funding so that the data is not questioned as being influenced by one of the stakeholders or any one invested party. If we are unsuccessful with public funding, then we will look carefully at what sources of private donations would be appropriate. This project was originally prioritized in the Big Sky Sustainable Watershed Stewardship Plan. For the snow modeling effort, the US Geological Survey will provide a 25% cost share if we can raise the remaining 75%. We are requesting 50% from BSRAD and will aim to raise the additional 25% from other stakeholders or private donations.
4. How will you ensure the recommendations of the findings will be implemented and funded by stakeholders (water managers, developers, and ski areas)? We cannot ensure that they will be implemented and funded by stakeholders, but we will have a much stronger argument when advocating if we have data to back up our argument rather than just scientific theory. That said, we have had good success with community buy-in to “do the right thing” for the watershed when we have data and science to back up our argument.
5. Your project end date is 6/30/23, what activity are you anticipating needing funds for in FY24 & FY25? With the current forecasted ask I would like to understand who is providing the work that needs to be paid for. The water budget analysis is a one-year project with an end date of 6/30/23. The snow modeling study is a three-year effort. The first two years are collecting historical and current snowpack data with the third year dedicated to analysis and report writing.

Project Name: Community Water Communications Campaign

Project Questions:

1. What are the lifespans of the deliverables provided in the application?
 - a. Execute a 5-month multi-media communications campaign (video, digital/print platforms) highlighting water projects & focused, community-based, collaborative work

in Big Sky: The deliverables for a multi-media campaign that spans the 6-month timeframe that we are planning may take months to be fully realized. We anticipate an immediate delivery on launching this campaign as soon as we know the extent of our requested funding. Our goal is to fine tune the proposal to outline a solid summer month campaign as proposed, June - October.

- b. Create a compelling localized narrative via earned media & paid media elevating GRTF water conservation & restoration projects: Per the answer above, much of the detailed work around the content, messaging, print and digital platforms and priority elements of this campaign will be developed as soon as we know the extent of the funding. This local narrative will run the length of the campaign, and beyond as long as relevant, which could be 3-5 years depending on the content.
- c. Produce a documentary-style video to help tell the story of the GRTF work to maintain a healthy Gallatin River watershed: Our goal would be to have this video filmed, produced, and released at the height of our summer season when the attention both on the river and on the Task Force is typically known to be at its highest. The goal for production and release is between July - September creating a vehicle to elevate the importance of the work that the GRTF does as long as relevant. Predicted lifespan is 3-5 years depending on the content.
- d. Drive social media interaction with shared media & relevant content around conservation, restoration work & related community events. The timeframe on this deliverable will be immediate, launching specific content to reach our audience, and increase the engagement through our digital and social media platforms and increase the traffic to our website. Lifespan up to 5 years depending on the content.
- e. Develop a steady stream of publicity via op-eds, letters to the editor & focused story pitches that highlight the success of GRTF work & the history of a credible, science-based watershed organization. Again, the work on this element will begin immediately, drawing from a bank of GRTF ambassadors who will be vetted to tell the most compelling stories with the most relevant connections to our work, the river, and the community values that prioritize a healthy river and watershed. We will consistently place content via a variety of accessible publicity platforms as soon as possible, with this type of media placement being one of the least funding dependent, but also critical in its fit with the bigger picture of storytelling across many publicity and communications mediums. Lifespan up to 5 years depending on the content.
- f. Build community engagement & showcase personal stories / connections to the Gallatin River that highlight the critical nature of river stewardship & responsibility to responsible resource management. This element will be worked into the plan, which we could begin to execute immediately as soon as the final deliverables can be established based on the final, hopeful funding, ideally by mid-late June. Lifespan up to 5 years depending on the content.
- g. Build the platform for ongoing publicity: The immediate implementation of this communications plan has specific deliverables and sets a trajectory for ongoing publicity based on the elements we find successful (delivering on engagement and exposure), and which ones are finite in what they can deliver. Our goal is to establish an ongoing publicity component to the GRTF scope of work, and do not intend for our publicity efforts to have a definitive end date. The campaign deliverables of this 6- month plan as outlined are the launch, the jumping off point that has been a long time in coming for

the organization to deliver the compelling and connected story of the community's relationship with the river, both historically, and moving forward. Lifespan up to 5 years.

2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? The application addresses more than one strategy, but these initiatives, specifically; Increase awareness of residents and visitors of local natural resources and Water Conservation
3. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.

Yes - There are distinct elements from several additional impact areas that could be folded into the goals and vision for this community campaign, and the ways in which the story about our work around the river can be guided. Specifically:

- Arts & Culture
 - Sustainability
 - And: the story of how the river is integral to the culture of Big Sky
 - Community Sustainability
 - Develop Sustainability Education, Build Networks and Coalitions
 - Economic Development
 - Connections to how outdoor recreation fuels our economy
 - Housing
 - Our community is growing, and as it does our water resources will become more tapped; integrating water conservation into our community and housing developments will be key
 - Improve & Maintain Water & Sewer Infrastructure
 - Education about the importance of Water Conservation
 - And categorically, Natural Resources Protected & Enhanced for Future Generations
4. What has the cost to community been due to the negative media and corresponding lawsuits?
 - a. Specifically, in dollars, the biggest impact has been to the Big Sky Water & Sewer District, who has borne the brunt of misinformed legal attacks from regional sources. Their legal bills to date to defend the community's state-of-the-art wastewater treatment practices have totaled over \$1.5 million in real dollars, and countless uncalculated hours of organization and staff time, research, preparation, publicity, and other taxing elements connected to years of pushing back on their practices of wastewater treatment.
 - b. Less easy to quantify are the costs to community members involved in the larger scope of conservation, recreation, land, and water advocacy. Most specifically staff time and organizational capacity and resources to manage and mitigate: ill-willed publicity and newspaper articles, addressing aggressive accusations of practice and policy, time spent patching damaged relationships with regional partners and decision makers, preparing statements, letters of support or opposition, and facing the stain of a reputation that includes accusations of Big Sky as community with no care for one of its most valuable and vulnerable natural resources.

- c. Over the past year significant amounts of money have gone towards lawsuits and staff time addressing confusion in the water resource area, where more \$\$ and staff time could have (should have) been dedicated towards beneficial project work. With a better understanding of water issues and all the community-wide efforts to benefit the resource, we could change the cost to value ratio of work v. time spent correcting bad publicity.
5. From the headwaters of the Gallatin to the headwaters of the Missouri do we have the data to communicate the individual community water quality impacts and has this been shared publicly? I.e., how does Big Sky compare to Gallatin Gateway, Bozeman, Belgrade, etc.... We don't have that information specifically, but there are 41 quality impairments on streams in the valley outlined in the Lower Gallatin TMDL:
<https://deg.mt.gov/files//Water/WQPB/TMDL/PDF/LowerGallatin/M05-TMDL-02a.pdf>
6. The application indicates an end date of 11/30/21 please validate.
I believe this might be a typo - this specific publicity campaign as outlined is meant to span the summer months - from June to October 2022. The ongoing publicity mentioned above would have a longer shelf life to be determined in specifics once this initial plan is executed.
7. Do you see this campaign as always needed or just during this specific timeframe when water and Big Sky's impact is a hot topic for the area and region?
A campaign like this will always be an important piece of the work around the Gallatin River - but is of critical importance currently. Specifically with progressing lawsuits and a suite of pending designations for protecting the river, publicity is one of the best tools we can use to elevate the right messaging, and the most accurate information on behalf of the community. Longer-term, publicity should be an integral part of any successful campaign to advocate for focused and intentional work.
8. Why in FY24 would you not decrease the other funding sources the same amount as BSRAD? It appears that you are expecting BSRAD to cover a higher percentage in years 2 and 3 than in year one. Please explain.
When developing the budget, we estimated (incorrectly) a similar reduction in resort tax as other sources, please change FY24 request to \$25,000 and FY25 request to \$12,500
9. How are you working with VBS and Chamber members to get this word out to our visitors who many not have the same emotional connection to Big Sky as residents do?
Once we understand the funding we can dedicate to this plan, and the scope of what we can execute in this campaign, we will absolutely wrap in our community partners who can be an extended vehicle to help us elevate this messaging. Those conversations are planned as this campaign unfolds.



FY23 DISTRICT QUESTIONS

Sponsor: Gallatin Valley Snowmobile Association

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6:
 - i. Daniel Kristensen fastcatm7@gmail.com
 - ii. Kristi Welfl kristinamwelfl@hotmail.com
 - b. June 9:
 - i. Bryan Capdeville blubyu_7@msn.com
2. Does your organization seek funding from sources outside of the BSRAD boundary?
 - a. Yes. The State of Montana provides funding for all the snowmobile trail grooming in the Big Sky and Bozeman area.
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?
 - a. The grooming program is mainly funded by two grants (State and BSRAD). Increased costs (equipment, parts, fuel, operator wages) will result in fewer trail groomings if the grants don't provide a similar increase.
4. What plans do you have to decrease your reliance on BSRAD?
 - a. None. GVSA has enough grooming funds provided by the State to groom Buck Ridge trail once per week. The additional grooming is directly tied to the funds received from the BSRAD grant. Without these funds, GVSA could not afford to perform the extra weekly grooming of the trail.

Project Name: Buck Ridge Snowmobile Trail additional groomings

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? Although these groomings enhance the strategy of **World Class year-round recreational opportunities for Big Sky**, it does not fall into any specific Initiative listed in 2022 Our Big Sky Update.
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.
 - a. Not directly. But grooming of the trail does contribute to economic development.
3. Do you anticipate there will ever be a need for additional groomings on other popular snowmobile trails in Big Sky? The only other groomed snowmobile trails in the BSRAD are Moose and Portal. These trails do not receive the snowmobile traffic that Buck Ridge does and would not be the best use of the funds available.

4. Have you ever had to quit grooming early due to snow levels and if so, how is the money you have raised utilized? Yes. GVSA treats the BSRAD funds as “pay as you go”. We do not request reimbursement funds unless we groom. Therefore, on a poor snow year we may not request all the funds allotted in our grant.



FY23 DISTRICT QUESTIONS

Sponsor: Morningstar Learning Center

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Mariel Butan (mariel@morningstarlearningcenter.com), Steph Kissell (stephkissell@gmail.com)
 - b. June 9: Mariel Butan (mariel@morningstarlearningcenter.com), Steph Kissell (stephkissell@gmail.com)
2. Does your organization seek funding from sources outside of the BSRAD boundary?
Yes
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?
Morningstar increased wages for teachers in November 2020 and November 2021, and another increase is planned for July 2022. We are also seeking employee housing via partnerships with the Housing Trust and LMLC. Working with Two Pines and the Housing Trust, we were able to lease a two-bedroom unit to offer as employee housing for our staff, which resulted in the addition of 2.5 FTE teachers to our staff this spring. We hope to add more units by September, with the intention of keeping as much employee housing available as possible while we embark on the research, planning, and building process that will ultimately lead to our own employee housing units.
4. Do current community-wide facilities address Big Sky's educational needs?
No, but we're getting there! The cost of living and housing shortage has driven many families away from our community, and the impact that will have on demand for our educational services over the next 2-3 years is yet to be determined. Opening the 4K is already helping MLC address Big Sky's educational needs by (pending being fully staffed) opening more spots for younger children at MLC. However, MLC's facility itself does not address the educational needs of the children due to it not being designed for this age group. This is what we are trying to address with the feasibility study and a new childcare building.

5. What gaps exist in childcare and education in Big Sky?

We believe evening, weekend, holiday, and summer care are the biggest gaps in Big Sky childcare and education, not counting the regular-day and education quality gaps caused by teacher shortages. MLC is scheduled to be open 225 days for the 22-23 school year, not counting the additional 10 days we hope to offer camps. With our extended operating hours, that's 30% more days and 82% more instructional hours than Ophir and 38% more days and 108% more instructional hours than Discovery's preschool. As a result, some families whose children attend Ophir or Discovery call MLC to find childcare during summer, winter break, and other closed days because other programming options don't exist or have limited space. Our teachers are expected to miss holidays with their families and not have the rest or planning time available to other educators in Big Sky to ensure that there is round-the-calendar supervision of children aged 6 months to 6 years in our town. As we've seen from our retention rates, this is not a sustainable model and treats our teachers as hourly workers rather than proper educators. This also creates a gap in the education we're able to provide at our center, as credentialed teachers are drawn to other programs. For a resort town with employers requiring evening, weekend, and holiday hours at a much higher rate than in other towns, we strongly believe there is a need for employers to participate in closing the childcare gap, rather than having these demands disproportionately fall on MLC.

6. Have you met with Discovery, the School District, the Library, after school program providers, and Camp providers to establish baseline metrics for education and childcare in Big Sky?
- a. If yes, what are the needs for the following
 - i. Square feet of facilities
 - ii. Necessary staffing

We have met with Discovery, Ophir, the Library, and Camp Big Sky, and we've attempted to meet with Lone Peak Playhouse to find ways to collaborate on meeting the needs for Big Sky's littlest. I cannot speak to the square feet or staffing necessary for other programs, but I do know that every partner with whom we've spoken has indicated that they are currently short-staffed and do not anticipate being fully staffed in the near future. Morningstar needs a minimum of 5,500 square feet, preferably more, for its current enrollment, and is working with a firm currently to assess these needs more specifically. We also require a full-time staff of 18 to operate at full capacity (50 children) given our operating hours.

7. **On the LOI you listed \$1,140,000 as your "FY24 Predicted Request" and \$660,000 as your "FY25 Predicted Request". When cross referenced with project data the total projected amounts come to \$1,175,000 in FY24 and \$700,000 in FY25.**

- a. Please explain the discrepancy in predicted requests for both FY24 & FY25
- b. Please clarify the organizations predicted requests for both FY24 & FY25

Between submission of the LOI and application, we received new information regarding projected costs and timeline for the building. Tuition Assistance remains the same between the two predictions (\$325k, \$350k, and \$375k to keep pace with tuition increases) as does Operations (\$75k per year), but we increased the Campus Expansion to total \$1m between the two years (\$750k in FY24, \$250k in FY25). We apologize now for the discrepancy and in advance as these requests are inextricably linked to the timeline and overall feasibility of the project. Our goal is to begin construction within a year, but this is contingent on the findings of the study as well as the availability and commitment of builders and contractors.

8. What Covid funding will you receive and when?

a. How will you replace Covid funding received this year?

We are applying for Covid relief funds from the Gallatin County Nonprofit Vitality Grant through One Valley, but this is not a long-term solution. We have discussed with our funding partners the need for continued operational support due to the long-term effects of Covid and the shifting local/national economy and labor market, and Elevate Big Sky has been named as the appropriate entity to fill the gap in our funding. The true long-term impact of Covid was the 105% increase in payroll between November 2020 and November 2021, which constitutes an amount we cannot pass to families through tuition. Even if we continue raising tuition at a blazing pace of 5-10% annually, we will never be able to make up this gap with tuition alone. One potential solution is an employer subscription model, which is being discussed via the Childcare Taskforce. The board is considering all options, including public subsidy, for sustainable operations.

9. How is the recent award of the ARPA funds (\$400,000) affecting your budget this year?

The ARPA funds have enabled us to launch a long-term sustainability plan by effectively serving as our operating reserve, freeing our existing reserve funds to commit to a project that will best serve the community's childcare needs. This involves improving the childcare experience for children and families through the learning environment itself as well as through having qualified, committed, consistent teaching staff. These goals are not possible without major updates to or rebuilding the childcare center and providing workforce housing for MLC teachers.

10. Can you explain what positions are considered Tier 4 and 5 in your organization?

While I don't personally view teachers as three tiers below administration, I skipped Tiers 2 and 3 because the examples used were Vice President and Director, and the teachers are neither. I used Tier 4 to refer to our lead teachers as they manage their classrooms and Tier 5 to refer to our assistant teachers as they assist the lead teachers. Since the submission of our LOI, we have added a staff member who I'd count as Tier 3, which is our Infant/Toddler Program Coordinator. She oversees the infant and toddler programs and manages those teams. I suppose our Center Director could theoretically be in Tier 2, but I view Laura and myself as equal partners in the management of MLC, just responsible for different spheres, so I included her on the Tier 1 level.

Project Name: Tuition Assistance Program

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
Increase affordable options for students aged 3 and 4 in the community
2. Have you considered working with partners to coordinate a larger scholarship effort in Big Sky?
We've considered it and spoken briefly about it with some of our partners, but ultimately we have not found a fair mechanism to do so. This doesn't mean we won't in future years, but who determines what's essential vs. non-essential, affordable vs unaffordable, and any other of the factors that would determine discounts for the various programs and services based on one

application? The US Dept of Health and Human Services calculated that childcare is affordable if it is at or below 7% of a family's income. This is data we can work with as an individual entity to make the fairest determination of affordability possible compared to our TAP budget.

3. What is the total \$ amount you need to fulfill the TAP requests this year?

Current applications for TAP are still in the review and verification process, but using the information we have now, keeping MLC tuition within 7% of family income for all current applicants could total as much as \$312,795 for the 22-23 school year, which does not exactly align with the 2023 fiscal year. This does not include data from waitlisted or new families who may be able to enroll this year, and it would only take four more average applications to reach our projection of \$375,000. Last year, we had 13 additional applications between initial awarding and now due to changes in family circumstances (both financial and having a new baby). In other words, even if we are fully funded, we may not be able to meet the standards of affordability determined by the US Department of Health and Human Services, but we will be close. With regard to the difference between the school and fiscal years, we want to note that with our enrollment model transitioning on 9/1/22, and the annual transition of children in and out of our center at the beginning of each school year, some of the requested funds will serve to fulfill the commitments made to families in July and August 2022 as they are within the 2023 fiscal year. The award commitments we make to families will continue to be from September through August each year to follow their enrollment with us. Therefore, our requests in July and August will always vary slightly from the requests from September through June each fiscal year as the new school year will entail new TAP applications, new students, and the joyful transition of graduating students.

4. What would the average % of income that families are paying for childcare be without the TAP program?

- a. What is the average amount received by families?

The average annual income of families who have applied for TAP for the upcoming year is \$81,436. Full-time infant tuition will be \$18,000, and full-time preschool tuition will be \$15,600. This means that the average applicant would be paying 19-22% of their annual pre-tax income on childcare without any tuition assistance. Families with two children would be paying over 41%. As mentioned earlier, the national standard of affordability is 7%. The current average award is 80% of tuition, which would be higher if we did not cap awards at 90%. At current tuition rates for a full-time family, that translates to \$1,120, \$976, and \$944 per month (\$13,440, \$11,712, and \$11,328 per year) in tuition assistance for infants, toddlers, and preschoolers, respectively.

5. Do any of your families receive childcare assistance through their place of work?

To our knowledge, we only had one family receive childcare assistance through work in the last year. It was only for one month, and that family is no longer enrolled at MLC.

6. Do any of your families qualify for the state childcare scholarship program?

To qualify for the Best Beginnings Scholarship, a two-person household (one parent, one child) would have to earn less than \$32,227 per year. That increases to \$40,626 and \$49,025 for three- and four-person households. Based on this information and our anonymized (and not yet verified) tuition assistance application information, it is possible we have two families who qualify. To maintain families' anonymity (and because this income information may be updated once the applicants' documents are finalized), we have asked our third-party reviewer to reach

out to these families with Best Beginnings information once their income has been verified to be below these levels.

7. Have you exhausted your options to come to the table with more matching funding for this project?

We are coming to the table with at least \$250,000 in matching funds to keep tuition affordable at MLC thanks to our community foundations and fundraising efforts, not counting some of our pending grant applications. Some of these funds are dedicated to the Tuition Assistance Program, and the rest cover our operational costs, making it possible for our tuition rates to stay at or below \$18,000 per year instead of the \$35,000 actual cost of caring for a child at MLC. It is imperative that we continue to approach affordability in this way because, as the only childcare in Big Sky, local employers will find it impossible to recruit new families to open positions if the published rates to attend Morningstar are \$35,000 per year. We continue to explore new avenues for funding options as we learn about them and as they become available. Additionally, in the past year we have increased fundraising efforts and community partnership opportunities and relationships.

8. How many families are enrolled in MLC?
 - a. How many families receive the TAP Funding?

Currently we have 70 children enrolled, with 34 children receiving TAP funding.

Project Name: MLC Operations

Project Questions:

1. What is the lifespan of the deliverable provided on the application?
 - a. Morningstar pays its teachers a living wage

This is a difficult question to answer. It is our intention to pay our teachers a living wage (preferably better than mere living wages) in perpetuity, but we understand that deliverables are supposed to be more tangible and distinct. If the average monthly rent for one room in Big Sky is \$1,200 per month (and we know it is rising from there), employees at MLC would have to make at least \$48,000 per year, or \$23.07 per hour, in order to meet the national recommendation that no more than 30% of income should go to housing. Currently, our average wage with a cost of living adjustment is \$24.25 per hour, with not all staff meeting the \$23.07 threshold. Thus, this wage only meets the needs of some of our staff, especially since most of our teachers have families or are single parents and need more than one bedroom. Please let us know if you require further clarification.

2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
Increase affordable options for students aged 3 and 4 in the community, increase affordable housing options for educators, increase opportunities for students in summer and non-school days
3. Does the \$790,000 number of Dues, Fees, Sales revenue outlined on the project budget include the \$325,000 of Tuition Assistance being requested via project 1?
yes
4. Are you paying for any housing expenses for your employees and if so, where are those funds coming from?

We have entered a lease on a two-bedroom condo. Employees who live in this housing pay rent via payroll deductions, but we did incur initial expenses (security deposit, rent and utilities prior to occupation) in order to be able to provide this for employees. We anticipate the transition period and expenses would occur again with any additional housing we acquire. Funds for this are coming from our operations budget.

5. How much more are you having to pay teachers to recruit them from Bozeman vs the childcare programs in Bozeman?

We would love to have an answer to this question! With Target and similar unskilled jobs paying \$22 an hour, we continue to do what we can, but at a certain point, we are unable to compete. Our current average wage, including a cost of living adjustment, is \$24.25 an hour. In November 2020 when wage discussions initially occurred at the community level, comparable wages at childcare centers in Bozeman were \$14-16/hour. We are still seeing them range from \$14-20/hour and have heard from our licensor that Bozeman centers are mostly overstaffed. We're not in a position to truly verify that information, but if it's correct, then obviously these locations are paying enough to keep people from commuting to Big Sky. While the financial component is significant, there are other resources and personal decisions at play, like public transportation barriers (routes, not wanting to take a bus with an infant), time with family, fears about road safety (including traffic, road conditions, and the conditions/reliability of someone's car), and more that counteract the enticement of higher pay. It is also of note that on average, we can't pay teachers enough to afford Big Sky housing, and every staff member who has moved from Big Sky in the past two years has also left or expressed plans to leave MLC. It is worth noting that many of our teachers have very young children, so carpooling, public transportation, or even driving solo are not as feasible as for the average commuter to Big Sky.

6. If you are not fully staffed, how do you ensure the BSRAD funding is utilized proportionately to your staffing levels?

Being fully staffed costs us over \$1m per year. Being less than fully staffed, like this year, we're projected to have a total of over \$872,000 on payroll and related staffing costs. Staffing also impacts our ability to enroll more students and/or be open five days a week, thus negatively impacting our tuition revenue. As such, whether or not we are fully staffed, we rely on the full funding from BSRAD to support keeping tuition rates low for our families.

7. Has your board approved the contract/salary payment model?

Initial presentation of this model was accepted by the board, but a final plan has not yet been presented to the board for a vote. It is currently being workshopped in committee.

Project Name: Morningstar Campus Expansion

Project Questions:

1. **What is the lifespan of the deliverable provided on the application?**

- a. **Feasibility study regarding the use of MLC's existing empty lot**

The feasibility study will be valid through planning and ultimately construction of any building on that lot, because the feasibility study entails both facility/housing needs as well as what's possible to do with the current buildings/land, which will categorically change once something is constructed.

2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?
Increase affordable housing options for educators
3. How will this expansion affect operating costs once completed?
 - a. Do you anticipate requesting Resort Tax funds to cover these costs?
Initially, if the anticipated outcome of this study proves true, operating costs will rise during construction and renovation. In the long-term, however, this project will slow the rate at which tuition will have to increase (or the degree to which we are reliant on philanthropic support) because we will have consistent teachers, consistent enrollment, and an additional source of income from rent.
4. Have you confirmed that you have the SFE's for the project?
 - a. What is the capacity of the SFE's that were purchased with the vacant lot?
We have been reaching out to Water & Sewer for several months to confirm this information. We have not yet received an answer, but they have responded that they are aware of our request and will get back to us soon.
5. The project application indicates that this is a one-year project based on the start date of 7/1/22 and the end date of 6/30/23. Based on other information in the application it is our understanding that this is the first phase of a multi-phase, multi-year project. What is the anticipated completion date of all phases of this project?
This question is difficult to answer. Current average time to completion of equivalent sized projects in Big Sky is two years from start of construction, so if we are able to complete this phase of the project by Spring 2023 and begin the next phase immediately, we are looking at an earliest possible completion date for the overall project of Summer or Fall 2025. Unfortunately, as with any construction project particularly in a "post-Covid" world, there are many potential confounding factors that could delay this timeline.
6. It looks like on your project budget that if BSRAD funded your grant award in full you would have \$130,000 available, but the cost of the feasibility study is only \$100,000? Is that correct? If so, how would you use the additional \$30,000?
This project has been estimated to ultimately cost as much as \$3.5 million. We entered additional funds that have yet to be raised but that we plan to raise to be prepared for future phases of this project. We wanted to demonstrate that, should this phase be completed on time (halfway through this fiscal year), we have plans to fund the forward movement of the project.
7. To confirm this is the design process only, correct?
yes
8. You are requesting an additional \$1M for this project over the next 2 years and indicate you will request for a 3rd year, what percentage of the Capital ask are you anticipating BSRAD request to be for the entire project? Where do you anticipate the additional funding coming from?
ARPA initially indicated that as much as \$1 million would be available in grant funding for the expansion and building of new childcare centers. This has become less clear in recent weeks, but the Childcare Task Force is working to get clarification on what funds can be used for. Our initial estimations were roughly 33% resort tax, 33% ARPA, and 33% fundraising and philanthropy.
9. Are you working with the Housing Trust as this is their area of expertise?
yes



FY23 DISTRICT QUESTIONS

Sponsor: The Montana Land Reliance

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6:
Jessica Wiese jessie@mtlandreliance.org
 - b. June 9:
Jessica Wiese jessie@mtlandreliance.org
2. Does your organization seek funding from sources outside of the BSRAD boundary?

Yes

3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?

MLR offers competitive wages, excellent benefits, work from home offsets and flexible schedules to retain staff and counter cost of living increases.

4. Are there local (within BSRAD boundary) capital investments that would move the needle for conserving open land in Big Sky?

There are opportunities for capital investments in conservation that will be coming in the next 1-2 years. None of these projects are currently “shovel ready” enough to request funds but are in the works.

5. Is the organizational budget you provided for all of the work MLR does or just this specific region work?

The organizational budget is for all of MLR’s work.

Project Name: Conserving Big Sky's Wild and Open Lands

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?

Primary:

Enhance and protect critical habitat for wildlife and water

Increase awareness of residents and visitors of natural resources

Secondary:

Increase parks and open spaces by 35 acres
Increase sequestration of carbon and ecosystems

2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain.

MLR works specifically in the conservation field, however, protection of Big Sky's natural resources will continue to drive the economic engine of the community as most visitors and tourists come to Big Sky to enjoy the natural environment and scenic beauty.

3. What areas are of highest risk of losing or harming wildlife habitat?

Lands that are in known wildlife corridors that cross the large private land bubble of Big Sky are at the greatest risk of being lost. These areas are seeing rapid development. It is critical that if/when these lands are developed, even in high density scenarios, that there is consideration for wildlife movement across the landscape. More research is needed to determine where each of these corridors is located and MLR is working with other conservation groups to help facilitate this data gathering and on the ground research work.

4. Do you always see the need to request funding from BSRAD? If not, what would need to change for you not to be reliant on BSRAD funding but still accomplish your scope of work here in Big Sky?

MLR does see the need to continue to request funding from BSRAD. If private donations increased dramatically it is possible that MLR would not be reliant on BSRAD funding at some point in the future.

5. In the application you mention that MLR will protect an additional 2,000 acres of land in the next 2-4 years. How many of those acres are in the BSRAD boundary vs around the boundary?

All of the acres are in the boundary.

- a. How many acres within the BSRAD boundary are opportunities for conservation?

There are 34,922 acres of unconserved private land in Big Sky broken into 149 parcels.

6. In the application you mention a gathering to educate landowners - what is the area you are targeting for this?

MLR is working toward two kinds of events – one that is oriented at education of the public on conservation easements, the other is targeted at prospective or existing conservation easement holders.

- a. Do you have partners in the area that you are working on this gathering with?

No, however a joint event like BSRAD organized around the application requests was an excellent way to link together the work we are all doing. The joint commissioner meeting where some of the conservation work in the community was highlighted was also an excellent way to educate the public on multiple conservation efforts at one time. MLR is also a member of the SNO board and we discuss frequently how SNO may be able to be an organization that helps to facilitate more cohesion and joint efforts for the conservation community.



FY23 DISTRICT QUESTIONS

Sponsor: Visit Big Sky

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: Brad Niva Brad@BigSkyChamber.com, Caitlin Quisenberry Caitlin@BigSkyChamber.com and Tim Drain t.drain@naturalretreats.com
 - b. June 9: Brad Niva Brad@BigSkyChamber.com, Caitlin Quisenberry Caitlin@BigSkyChamber.com and Tim Drain t.drain@naturalretreats.com
2. Does your organization seek funding from sources outside of the BSRAD boundary? *Yes, we are allowed to apply for statewide lodging tax funds.*
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? *Due to a cut in our staffing of 25% in 2021 we're currently meeting the needs of our staff in regards to wages and cost of living. We've also instituted a work from home program two days a week for those employees who live in Bozeman.*
4. What is the purpose of the Unrestricted Reserves outlined on the Sponsor Efficiency Worksheet? *These funds are unrestricted net assets.*
5. Please explain the "Other" Revenue from Previous FY outlined on the Sponsor Efficiency Worksheet. *\$456,122 were funds awarded to VBS from state and federal grants to support the hospitality and tourism industry during COVID.*
6. On the LOI you listed \$450,000 as your "FY24 Predicted Request" and \$550,000 as your "FY25 Predicted Request". When cross referenced with project data the total projected amounts come to \$715,000 in FY24 and \$850,000 in FY25.
 - a. Please explain the discrepancy in predicted requests for both FY24 & FY25 *We have FY23 projects that will continue into FY24 and FY25, as well as additional aspirational projects that we listed on the LOI.*
 - b. Please clarify the organizations predicted requests for both FY24 & FY25 *These predicted requests in the LOI are aspirational projects that we'd like to consider in future years. However, based on the bandwidth of our staff as well as other circumstances we may or may not pursue these future FY24 and FY25 requests.*
7. Why does the Expenses and Revenues section of your application show nothing in terms of Private Donations, Fundraising and Other Revenue? *As a 401C6 we're not allowed to accept donations or fundraise. We are allowed to generate revenue which is typically selling advertising in our annual visitor guide and apply for grants.*
8. What is your current dues and fees structure? *We have no dues.*
 - a. *Is there an opportunity to adjust them to address the funding gap? As designated in the Big Sky Resort Tax District charter, those funds collected can be used for tourism development. BSRAD has a long history of supporting the tourism industry in Big Sky.*
9. Your request to BSRAD overall is almost double what you received from BSRAD in FY22, what is different this coming year than last? *This year there is one significant infrastructure project:*

- Firepit Park Public Bathrooms. This one time ask of \$333,000 has made this year's ask higher than previous years. If the bathroom project was removed, our overall ask is less than last year.*
10. Your administration is currently a higher percentage than your programming, why? *So much of our daily work is administration of projects. We've always had a high admin cost of rent, wages and benefits.*
 - a. What plans do you have to bring your administrative costs percentage down? *We're restructuring our office and duties to share more costs between the Chamber and Visit Big Sky.*
 11. Why is your other public funding only \$9,000 this current FY when it was \$456,122 the previous fiscal year? *In FY21 Visit Big Sky was awarded \$456,122 in state and federal grants to support the tourism and hospitality industry during COVID-19. Those grants were not available in FY22.*
 12. What plans do you have to decrease your reliance on BSRAD? *Eventually the tourism industry will form a Tourism Improvement District and will tax visitors via a nightly room charge. This district formation will take a number of years to establish.*
 13. Jackson Hole, Sun Valley, Vail, and Aspen all keep their CVB within their chamber. Have you discussed why with any of them?
 - a. Why they do this, and we do not? *Around the country it is common to separate the CVB from the Chamber of Commerce. In 2017, the Chamber spun off VBS into its own 501 C6 and separate board of directors. In a recent call with the head of the Aspen Chamber we confirmed they were one organization Chamber and VBSd calling themselves a Resort Association.*

This might be helpful from a 2020 report from DMO Proz:

DMOs within Chambers of Commerce are typically found in two scenarios: in destinations with very small budgets or in communities in which the economy is almost completely dependent upon Tourism. However, if the Chamber is engaged in local or State advocacy efforts in which it could be at cross-purposes with its local elected officials, this structure often puts the contract with the municipality at risk. Thus, the DMO is often more appropriately positioned as an independent agency. Chamber Membership programs can also be problematic for effective destination marketing if members are the only businesses and attractions that are featured. While the case (as flimsy as it is) could be made that businesses wanting to be featured in the destination marketing initiatives should be willing to invest in the Chamber, there are other reasons such a business may not want to be associated with the organization. If a municipality is going to invest TLT revenues into a Chamber to perform destination marketing services, it should be able to expect that all its visitor-related businesses can access visibility through such a program of work. Indeed, we've seen some Chambers decline the opportunity to take on destination marketing because they feared the impact such an expectation (marketing non-members) would have upon paying members. All that said, we have seen "best in class" DMOs in all three of the primary structures in play across the nation. Government DMOs and Chambers of Commerce can be extremely effective if managed properly. But, with roughly two thirds of DMOs in America operating as independent agencies, this is the structure that has found the most success across the country.

Project Name: VBS Operations

Project Questions:

1. Please explain the direct costs (programming and capital) listed on the project budget when this project is classified as "Administration?" *Payroll and benefits are under Direct based on the fact that none of the tourism services for Big Sky would occur if these funds weren't available.*
2. What are the lifespans of the deliverables provided in the application?

- a. A staffed visitor center with robust information that represent our businesses as guests plan their trip *-Lifespan 3+ years*
 - b. Maps of town, local hiking trails, and national parks *-Lifespan 3+ years*
 - c. Comprehensive events calendar for visitors that is accessible to all local businesses - *Lifespan 3+ years*
 - d. Up to date website available for visitors to plan their visit *-Lifespan 3+ years*
 - e. Coordination of industry events to share best practices *-Lifespan 3+ years*
 - f. Strong social media outreach to inspire future travel but also educate visitors before coming to Big Sky *-Lifespan 3+ years*
 - g. Continue to be a lead coordinator for tourism within the community of Big Sky *-Lifespan 3+ years*
 - h. Leading initiatives for visitor communications; such as wildfire preparedness, smart wildlife safety warnings, support the concept of Leave No Trace within our open spaces - *Lifespan 3+ years*
3. What are the metrics for the goals outlined on the application?
 - a. Set expectations for visitors through the use of staff time in conversations over the phone or in person that set guests up for a successful trip where they have a positive experience: *Outreach to over 7000 interested visitors on an annual basis*
 - b. Create a coordinated calendar of business closings so that there are less periods of time without any restaurants open and unhappy visitors: *Setting up a Big Sky restaurant guild where the restaurant industry can organize and make sure there is adequate food options for our visitors.*
 - c. Continue to provide front line workers in Big Sky to be welcoming to all races, religions and chosen sexual orientation: *Set up four meetings to host industry trainings focused on diversity, equity and inclusion.*
 4. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Advocate for Big Sky as a year-round tourism destination.*
 5. What are the hours of operation for the Visitors Center? *10am to 4pm Fall, Winter and Spring /9am to 5pm Summer*
 - a. How many visitors stop by the Visitors Center each year? *>6000*
 6. How much of this request is for Visitor Center operations: \$20,000 for rent.
 - a. What are the most frequently asked questions at the Visitors Center? If they walk in it: *"Where are the public bathrooms?" If it's an email request or phone call it's "I don't understand Mountain, Meadow and Canyon. Where do people stay?"*
 - b. What is the most common way for visitors to reach out with questions or requests for information? *We're asked for over 200 visitor guides a week to be mailed, website is the conduit to contact our office. Of course phone calls are very popular as well.*
 7. Why is this 100% funded by resort tax? *We receive funds from the state lodging tax, however it's limited to 20% of our annual award, about \$120,000. Those funds are not enough to pay our rent and staff our offices. Tourism offices around the country are funded by the local municipality based on the fact that it's the leading economic driver in a community.*
 - a. What other sources of revenue have you explored? *An additional lodging tax could be added to all overnight stays in Big Sky, however the tourism and hospitality industry*

feels that Resort Tax should be paying for these services and additional taxes are not required on our visitors.

8. What is the variance, if any, between your VBS Operations last FY and your request this year? *There is a reduction in ask of \$16,000 from FY22 vs FY23.*
9. How much do you anticipate from the CVB this year? *\$603,746*
10. Explain the increase in FY24 and FY25. *We anticipate operations and expenses to go up 6% over previous year.*
11. How can you work with GRTF on their water conservancy piece with the visitors you are managing? *As we develop our destination development plan, we'll take a deep dive into ways to work with our stewardship partners to collaborate on future projects that will support each others mission. Initial conversations is to do outreach to all homeowners to use low flow fixtures and for VBS to educate our visitors on "waterwise" practices.*

Project Name: Visitor Impact Research

Project Questions:

1. What are the lifespans of the deliverables provided in the application?
 - a. Data points on visitor spending -*Lifespan 3+ years*
 - b. Data points on visitor preferences -*Lifespan 3+ years*
 - c. Data points on visitor traffic and trends -*Lifespan 3+ years*
 - d. All of this data would be continually updated so as to be the most relevant and helpful-*Lifespan 3+ years*
 - e. Industry focused webpage or email for local tourism partners to access this key data for decision making purposes -*Lifespan 5+ years*
 - f. Feasibility study looking at the long term needs of a convention center and a hotel needs analysis -*Lifespan 5+ years*
 - g. Tracking on the over 1100 short term rental properties and the 1000 hotel lodging rooms available in Big Sky on a nightly basis -*Lifespan 3+ years*
 - h. Forecast booking trends months in advance and share with industry partners -*Lifespan 3+ years*
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Advocate for Big Sky as a year-round tourism destination.*
3. Is there an end date to this research? *No, healthy destination management organizations monitor data constantly to identify opportunities and adjust marketing to keep a constant flow of visitors coming to a destination.*
 - a. How will the findings be used to mitigate tourism impacts? *We've been using cell phone tracking technology for the last eight months and believe at the one year mark we'll have a better idea of places visitors go. We've collaborated with GRTF on geo-fencing key river access points to get a count of how many visitors are coming to that particular place. This information will help us form a management plan to deal with overuse of particular areas.*
 - b. How will this research inform decision making and planning? *This information will help us form a management plan to deal with overuse of particular areas.*

- c. Will the findings of this research identify future capital projects? *It will, such as increased parking lot needs, public bathrooms and potential traffic issues.*
4. Are you applying for any of the grants that you mentioned in your application to help with this project also? *Not to date, but we're looking at a number of options. To date, our data is more robust than almost any community in Montana and other communities haven't asked for this type of funding so we're starting to push in that direction.*
5. Is this expanding the data set you had given with cell phone tracking or is this something completely different? *This is continuation of the data for FY23. Cell phone tracking is included as well as hotel room occupancy data collection of over 2000 doors/keys in Big Sky, as well as visitor spending data using visa credit cards. We also use these funds to pay our economist contractor to crunch the data and put it out in a readable form.*
6. Do you have all the other lodging partners support? *As of June 1, 2022, all lodging partners in Big Sky will be participating. This is a great accomplishment because in the past only 55% of our lodging partners were participating. With new leadership at VBS we've built the confidence of the Big Sky Resort and they've now agreed to participate and share their data to complete our dataset.*
 - a. Do you have support from local businesses? *We do. They love seeing the data and we're working on better delivery systems to put it in front of businesses. Ideally, our goal is to be able to tell local restaurants that the community is 90% full a week out so local businesses can staff accordingly.*

Project Name: Firepit Park Public Bathrooms

Project Questions:

1. What is the lifespan of the deliverable provided in the application?
 - a. A four-stall bathroom that would exist in Town Center: *-Lifespan 20+ years*
2. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Improve and Maintain Infrastructure*
3. Upon completion of the bathrooms, will the bathroom in the Visitors Center still be open to the public? *Yes, however we really don't have a public bathroom at the visitor center. It's shared by staff and visitors but not set up for heavy use.*
4. How are the public restrooms in West Yellowstone funded? *City of West Yellowstone*
5. How many public bathrooms are there in Big Sky and are they meeting current demand? *Three public bathrooms. One, in between Montana Supply and Acre, the other is in the hallway at the Wilson Hotel off the Plaza. The newest is on the north wall of BASE but not accessible for wheelchairs and fairly difficult to locate. All are privately owned and managed by the business that owns the property. There are no publicly owned bathrooms available.*
6. How will ongoing upkeep and maintenance be funded? *State tourism funds allow the expense of maintaining public restrooms. VBS will receive the state funds and hire a contractor to clean the bathrooms on a regular basis.*
7. Where will parking be to access these bathrooms? *Current parking is available along Firepit Park. No additional parking is required.*

8. How will the bathrooms be managed during events (i.e. farmers market and music in the mountains)? *Has not been decided yet, but we anticipate an increase in cleanings during special events. With our current four toilet plan, our capacity will be 182 uses an hour.*
9. What security measures will be in place? (i.e. cameras, security guards) *Nothing currently planned except the ability to lock them manually if needed.*
10. What remaining permits and approvals are needed to begin site work on this project? *All permits are needed and no formal plans have been submitted to the county or the water and sewer district. Preliminary discussions have been made and we've not identified any major issues to proceed. It's been very well received by all parties, including the land owner. It should be noted that TCOA had given preliminary approval. However, with the new ownership of Lone Mountain Land Company, we've continued the conversation and feel comfortable proceeding with them as a partner and possibly as the construction manager of the project.*
11. What is the construction timeline? *If we use standard construction methods, 4-6 months. If we go with a prefab unit, 3-5 weeks once unit arrives on site..*
12. Why is this funded 100% by resort tax? *If BSRAD isn't interested in supporting this project we'll look at alternative funding sources.*
 - a. Have you looked for alternate funding (including Town Center)? *In initial conversations TCOA doesn't have any funds for infrastructure.*
13. Are the State tourism funds you reference of \$50,000 for maintenance in addition to the funds you are currently allocated? If so, couldn't they also be used for the existing restrooms that already get hit incredibly hard i.e. Ousel Falls? *No, the \$50,000 is part of our overall budget that allows us to spend allocated funds for "visitor services". We've been in conversations with BSCO and looking to partner to use the state funds for cleaning the new bathrooms as well as other locations around Big Sky.*
14. Can you show a map of location? *Please see attached map.*
15. Do you have the support of the landowner and the TCOA? Yes, we've had support from TCOA and the Simpkins family. Now with the recent sale to Lone Mountain Land Company we've continued the conversation and discussed it with them as well.
16. Do you have you plans completed for the project with engineering and architectural plans? Please share if you have. *We have preliminary plans and budgets, but no engineering. We're still considering if we're doing traditional construction or going with pre-fab. We've attached what plans we've received.*
17. How can you work with your partners and potentially the Parks District to allow for more efficiency with this project? Example, BSCO and potentially parks district have bathrooms they are already managing as part of their infrastructure. Can you loop into this and potentially hire them to operate gaining the efficiencies they already have? *Yes, already in the process. We're interested in economy of scale, and realize a full time position could be hired to clean all the public bathrooms throughout town. VBS and BSCO have a good working relationship and there is a goal to work together to make this as efficient as possible.*

Project Name: Community Event Sponsorship

Project Questions:

1. What event(s) is the sponsorship for? *We're looking a fall event such as "Octoberfest" and then a sports tourism event in the spring such as "Big Sky Tough Mudder" or similar. Funds will also support Skijoring at Big Sky Winterfest.*
 - a. Who will be hosting these events? *We'll be partnering with local groups to manage the events. Funds will be used to pay an event manager to run the event. These funds will act as "seed" money to make them happen. With all of these events we want proceeds to benefit local non-profits.*
 - b. Specifically, when do you anticipate these times to be? *October, February and late April/early May.*
2. What is the lifespan of the deliverable provided in the application?
 - a. Community wide events that would ideally establish annual programming that becomes self-sustaining after our initial commitment. - *Lifetime 3+ years*
 - b. Deliver a group of new visitors to Big Sky during the shoulder season. - *Lifetime 3+ years*
 - c. Initiate a new "Octoberfest Event" and a spring athletic event. Example: Spartan Race or Tough Mudder race - *Lifetime 3+ years*
3. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Advocate for Big Sky as a year-round tourism destination.*
4. How can you attribute an increase in overnight stays to a particular event? *There are a number of ways. In event promotion, a hotel room block with a "special rate" can be introduced. We'll get a room count based on the reservations tied to that special rate code. However, the more accurate impact is running an event geo-fence to track cellphones coming into the event. Within ten days of the event we'll have a demographic report on where they came from, how long they stayed and what else they did while visiting. At the end, we'll know the economic impact of the event with real data, not guesses.*
5. Is your strategy with shoulder season events to flatten the visitation peaks or fill the valleys? *Exactly, looking at our hotel/lodging occupancy, traditionally Big Sky dips below 20% occupancy in April, May then again October and November. Since the pandemic we've seen up to 40% occupancy in these months which is a strong sign that we're becoming a year-round destination.*
6. Why not simply flex staffing during slow visitation periods? *Not sure how to answer this question? Flex staffing? I'll take a guess, we've been meeting with local restaurants and looking at ways to share staffing between businesses when they close for the shoulder season. However, we're seeing less transient workers and more dedicated full time people who need to work year-round. Could a worker pick up additional shifts at another restaurant when their restaurant is closed? We've been looking at this option.*
7. What data do you have that supports the Big Sky businesses wanting to see events like this created?
 - a. Have you spoken with businesses to see if they are even interested in the idea of year-round occupancy? *It seems that even when we were busier in the shoulder seasons many restaurants still closed to give themselves a break and time off. This is a huge shift for many, considering there used to be a clearer plan for closing businesses for a week*

or two and coordinating to make sure other places were open. That no longer seems to be happening or happening well. If you are working on building up these times you need to ensure the businesses are in favor of this. If they, are I would think they would consider some type of investment in the idea?

Answer: The tide is shifting. The sleepy shoulder seasons are not so sleepy anymore. With recent hotel occupancy nearing and soon extending beyond 40% we're seeing people in town and they are looking for restaurants to be open. Some businesses will see the opportunity and shorten their shoulder season breaks. Lone Mountain Land Co. and Visit Big Sky are in the process of developing a feasibility study to look at the idea of building a convention center that would bring year-round visitation to Big Sky. We realize that's three to five years away, but eventually no matter what local business thinks, visitors will be coming and it's up to the local business owner if they want to take advantage of this opportunity.

8. Please explain why in FY24 and FY25 BSRAD is the only forecasted funding source for this. *The funds that are being asked for won't be enough to pay for the complete event, so additional sponsorship funds will be needed. As mentioned above we're looking for "seed" money to get the event on its feet and let it be sustainable after year three.*

Project Name: Sustainable Tourism Materials

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *There are a number of initiatives that this project supports: Promote wildlife conservation, support invasive species efforts, education, address fire fuel mitigation.*
2. Nearly 50% of total projects and amount requested is attributed to Recreation and Conservation. Does this project involve collaboration with the goals of any other Impact Areas (Arts & Education, Economic Development, Health & Safety, Housing, Public Works)? If so, please explain. *It crosses over many of these organizations and projects throughout our town. However, what makes it unique and an opportunity is that these efforts are all directed at the visitor. Education and teaching the value of our place, our wildlife and how visitors impact the residents. Visit Like a Local and You're On Mountain Time have been well received by all our partners and as we expand the campaign we'll share our partners messaging to visitors as well.*
3. How and what metrics will you use to measure the success of this program? *Because this is an education campaign putting metrics on this is really hard. However, the feedback from the community and businesses has been phenomenal, but unmeasurable.*
 - a. How is funding a portion of your rent & mortgage helping to achieve the goals of this project? *Our offices are the distribution center of much of the collateral.*
4. Do you have the support of the business community with this project? *Yes, we've had amazing support and they can't wait for the next campaign.*
5. How will the materials (magnets, coasters) be distributed? *We go door to door, and update all existing businesses with the newest campaign. We also get many coming into our offices to pick up additional items.*
6. How are you working with other BSRAD funded entities asking for funding to create outreach and educational materials for similar purposes, ie Gallatin Invasive Species Alliance, GRTF, Big

Sky Fire District? *We're working with BSFD, GRTF and Arts Council on a number of future projects where we can cross market a common message such as "Be Fire Smart In Big Sky Country".*

7. Are the Montana Tourism Office additional funds or just allow to you use existing funds you have received for this purpose? *We're using Montana tourism funds for promotion outside of Montana, and asking BSRAD for funds to do promotion in the town of Big Sky.*
8. Who are your lodging partners? *We have 12 professional lodging property managers as stakeholders for lodging. Examples: Big Sky Resort, Stay Montana, Natural Retreats, The Wilson, Montage Big Sky, Rainbow Ranch etc.*
 - a. Does this include VRBO and AirBNB homes? *We have all VRBO's and AirBnB's that are professionally managed. However, we don't have individually managed properties in a database. It's part of the privacy policy of VRBO and Airbnb that they don't disclose ownership of particular properties.*
9. Please explain why in FY24 and FY25 BSRAD is the only forecasted funding source for this. *This is a specific campaign for Big Sky. It's education based marketing to educate our visitors when they're in our community. Per 98-01 Ordinance for Big Sky Resort District Section 1, paragraph 6: 6) Resort taxes collected will be used to fund infrastructure facilities or projects, public transportation, **tourism development**, and other public services and facilities within the District as well as all costs associated with the collection, administration, appropriation, expenditure, litigation of resort taxes; consistent with Ordinance No. 99-01-Ord.*

Project Name: Destination Stewardship Plan

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve? *Initiate new sustainability measures.*
2. What are the milestones and the dates/timing associated with them for this project? *Initial building of the plan with community outreach will be 6-8 months. Future projects from this project will be carried out over the next ten years.*
3. How will this research inform decision making and planning? *It's a collaborative effort for the community to come together and make a long term plan on how we're going to manage tourism.*
4. Is there an end date to this research? *First phase will be completed in the first year, however, a destination development/stewardship plan will live on and be adjusted based on the needs of the community.*
5. Have you identified the ambassadors for this plan, if yes who are they? *No, that was just an example in our application.*
 - a. How would these trail ambassadors and water stewards be different than what is already in place? *This was just an example in our application of what other communities have done to educate visitors and to steward our lands.*
6. Will this plan outline capital investments needed by the community to manage visitation? *It certainly can. We'll bring in a professional facilitator to walk our community through the steps to make an effective destination management plan. That might include infrastructure, or other resources to manage visitors.*
7. Is a plan like this a critical component to receiving the future funding and grants from the state tourism office you reference? *It's currently not in Montana. However, in other states it is*

required. Unfortunately, Montana is 15 years behind other more progressive states who have been managing tourism for years.

8. Is this plan set to manage just trailheads? That seems to be the primary focus in the milestones section. *Trailheads was just an example of places where we have friction between visitors and locals, as well as overuse of certain trails.*
 - a. If there are other areas that you plan on addressing what are the milestones that you are planning on using? *That will be explored during the development stage of the plan. It might be wildlife interactions or invasive species or...?*
9. Is BSCO open to the idea of you spearheading a plan for their trailheads? *As stated above, the trailhead ambassador plan is just an example of what other communities are doing. By no means are we suggesting that we'll be spearheading anything. We're just cataloging where there might be "pressure points" in and around Big Sky based on the number of visitors impacting a given place. Trails are just an example of where there is friction between visitors and locals as well as by trail users, horse vs bike vs hikers. The exercise of developing the plan will bring all partners in the community together and establish how we can manage our resources and how they affect visitors and locals.*
10. How is this different from the work you are doing as the coordinator of the "Positive Business Climate Where Businesses Can Prosper" and "Quality Visitor Experience that is Balanced with Local Needs? *This goes hand in hand with our other initiatives. This is just the first time we're going to put it down on paper and get community buy-in. Our hope is that there will be an excellent roadmap built that will guide our community for years to come.*



BSTC Bathrooms Concept 1

Bechtle Architects
4515 Valley Commons Dr Su 201
Bozeman, MT 59718
406.585.4161
www.bechtlearchitects.com

Date: January 25, 2022
Front Perspective

A1



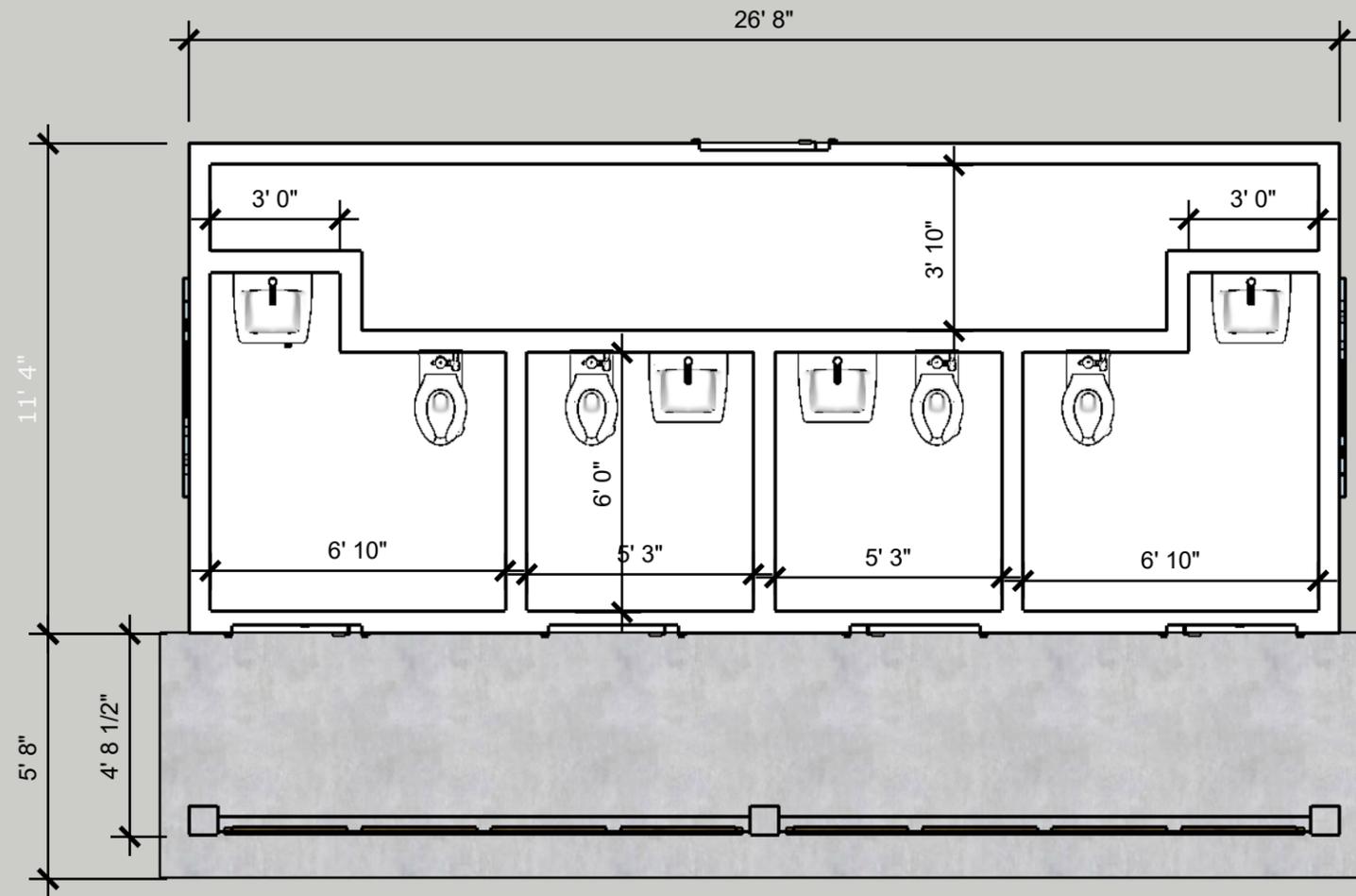
BSTC Bathrooms Concept 1

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Date: January 25, 2022

Overall

A2



BSTC Bathrooms Concept 1

Bechtle Architects
 4515 Valley Commons Dr Su 201
 Bozeman, MT 59718
 406.585.4161
 www.bechtlearchitects.com

Scale: 1/4" = 1'-0"
 Date: January 25, 2022
Main Floor

A3



BSTC Bathrooms Concept 1

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Bozeman, MT 59718
406.585.4161
www.bechtlearchitects.com

Scale: 1/4" = 1'-0"
Date: January 25, 2022
Front Elevation

A4



BSTC Bathrooms Concept 1

Bechtle Architects
4515 Valley Commons Dr Su 201
Bozeman, MT 59718
406.585.4161
www.bechtlearchitects.com

Scale: 1/4" = 1'-0"
Date: January 25, 2022
Right Elevation

A5

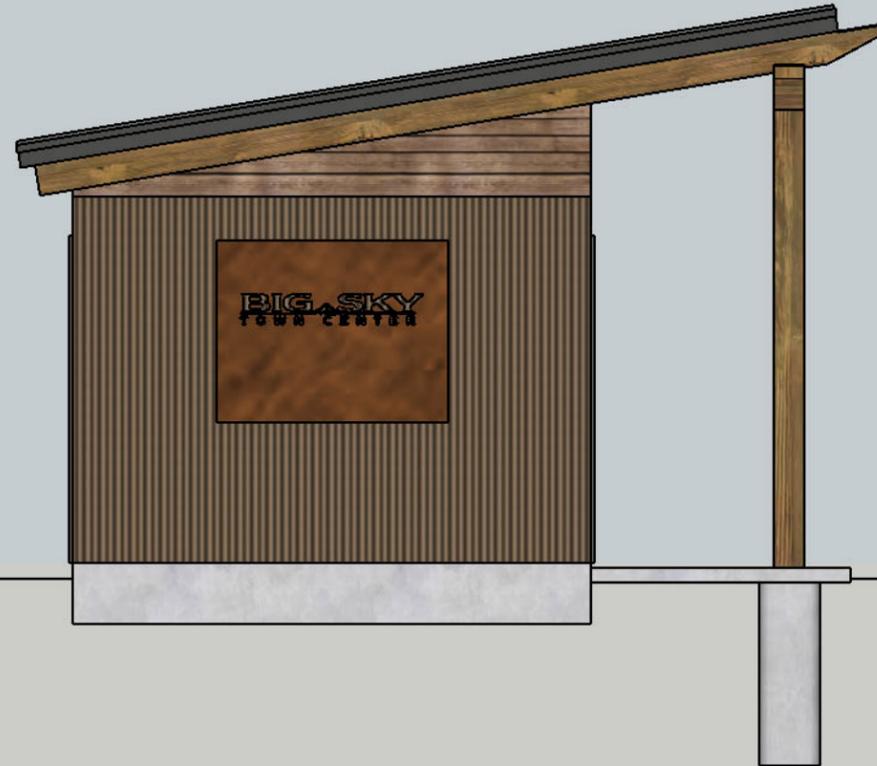


BSTC Bathrooms Concept 1

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Scale: 1/4" = 1'-0"
Date: January 25, 2022
Back Elevation

A6



BSTC Bathrooms Concept 1

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Scale: 1/4" = 1'-0"
Date: January 25, 2022
Left Elevation

A7



BSTC Bathrooms Concept 1

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406.585.4161
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Scale:
Date: January 25, 2022
Rear Perspective

A8



FY23 DISTRICT QUESTIONS

Sponsor: Wellness In Action

Sponsor Questions:

1. Please provide the names and emails of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: MaryBeth Morand, Executive Director (marybeth@wiabigsky.org) ; Stacey Chapman, Board President (sbchapman64@gmail.com) ; Betsy McFadden, Board Vice-President (bmcfLuke@aol.com) ; Sue Arneson (via Zoom), Board Treasurer (bigskybucky@gmail.com)
 - b. June 9: MaryBeth Morand, Executive Director (marybeth@wiabigsky.org) ; Betsy McFadden, Board Vice-President (bmcfLuke@aol.com)
2. Does your organization seek funding from sources outside of the BSRAD boundary? **Yes.** WIA seeks funding from national and state foundations. In the next year, WIA will explore accessing federal funds for behavioral health services.
3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis? **At present, there is only one FTE and everyone else is an Independent Contractor. However, we are in the process of trying to recruit another FTE (Care Coordinator) and that candidate will have access to free housing in the studio apartment in the WIA Office.**
4. Please explain why your FY23 request was 466% over what you projected on the FY22 application? **The FY23 request reflects WIA's commitment to providing adequate behavioral health services to the Big Sky community and that entails an expansion of services. Also, prior year requests were for operating income. This year's request is for a capital project.**
5. Please explain the purpose of Unrestricted Reserves outlined in the Sponsor Efficiency Worksheet. **The Unrestricted Reserves listed in the Sponsor Efficiency Worksheet reflected WIA's bank balance at the time. Currently, the Unrestricted Reserves are being used for operating expenses, e.g. salaries, rent, and counseling services providers, while grants are being applied for to cover these costs going forward.**
6. What is the biggest post pandemic impact on community health & safety? **The behavioral health impacts of the pandemic are predicted to linger within the community for the next few years. WIA's current caseload points to increased levels of anxiety and depression that correlate to the isolation and uncertainty the pandemic caused. It is our concern that the elevated levels of anxiety and depression will exacerbate the two most acute behavioral health issues in Big Sky: suicide and substance abuse since hopelessness and feelings of being overwhelmed are symptoms of suicide.**
7. On the LOI you listed \$120,000 as your "FY24 Predicted Request" and \$150,000 as your "FY25 Predicted Request." When cross referenced with project data the total projected amounts come to \$1,120,000 in FY24 and \$1,650,000 in FY25.
 - a. Please explain the discrepancy in predicted requests for both FY24 & FY25
 - b. Please clarify the organizations predicted requests for both FY24 & FY25

In the interim between the LOI and the application, WIA considered launching a 3 to 5-year capital campaign for a WIA owned Counseling Center. WIA is concerned about the availability of real estate in Big Sky in the years to come. The past 17 years has proved to WIA that there is an increasing need for the behavioral health interventions that we provide and such an organization needs to exist in perpetuity in Big Sky. Therefore, WIA believes it is time to seriously consider a permanent (WIA owned) facility.

8. Do you have or plan any relationship with Planned Parenthood to deliver their services to the Big Sky community? No, WIA is strictly behavioral health services, not women's reproductive health services.
9. What collaboration do you have with Big Sky Medical Center and other health care providers? WIA and Big Sky Medical Center both participate in the Behavioral Health Coalition. WIA and Big Sky Medical Center's Care Coordinator are in routine communication on client referrals for counseling. Since Big Sky Medical Center has psychological and psychiatric services (can prescribe medications), WIA refers clients in need of those services to Big Sky Medical Center. Big Sky Medical Center may refer overflow counseling patients or people who do not have insurance, or sufficient insurance, and need to access WIA's Sliding Scale counseling services.
10. Your administrative costs are almost half of your expenses at 47%, can you please share any insight you have on why these are so high? The administrative costs are disproportionately high because the program costs are low. WIA expects the program costs to grow in the future. This is the first year of much of WIA's new programming and just getting started.
11. Your projected request to BSRAD is significantly larger for the next couple of years, what are you accounting this growth in needed funding to? This year's request and the next couple of years reflect capital project requests for facilities that is why they are so high.
 - a. What plans do you have to decrease your reliance on BSRAD? In regard to the capital campaign, WIA will strive to secure funding from the limited number of foundations who do fund capital projects, and, individual donors in Big Sky. In regard to general funding, WIA will continue to make funding requests to a diversified portfolio of foundations who fund behavioral health and WIA will increase its fundraising efforts to attract individual donors in the Big Sky community.
12. In the past you have always requested funds to support the counseling services themselves, where are those funds coming from instead this year? WIA has applied for grants from a variety of foundations including the local club foundations, the Montana Healthcare Foundation, Pacific Source and the MSU Rural Health Initiative.
13. What plans do you have to bring your administrative costs percentage down? WIA is currently conducting a mid-year budget review and has decreased some of those costs in the budget for the second half of 2022. However, the long-term solution is to increase the amount of programming that those admin costs support. The direct:indirect cost ratio is predicted to improve significantly within 24 months.
14. Are there counseling rooms in BASE? Yes, there is one that a private practice provider uses. With the remodel of this building, WIA would provide five more counseling offices at no cost to counselors. The provision of these offices is intended to attract more part-time counselors to Big Sky and a roster of counselors who have various specializations, e.g. addiction, geriatric,

couples, gender identity, Spanish speaking, etc. It is possible that there are some people in Big Sky who would be more comfortable seeing a counselor in a location outside of the town center.

15. You are forecasting \$1M in 2024 and \$1.5M in 2025. Is this for a standalone facility? Yes. However, if there was a compatible non-profit who would like to share a building, WIA would be very amenable to this possibility.

Project Name: Counseling Services Hub - Building Remodel

Project Questions:

1. Is your current location best suited to serving your clients?

There are many advantages to our current space. The building is discreet and unassuming. Clients can park behind our building or up the driveway at NAPA if they do not want to be observed. WIA provides services to various income levels and some of our clients may be more comfortable receiving services in a location outside of the town center.

- a. Have you explored purchasing the current building prior to renovating rental space? At this point, WIA is not in a financial position to purchase the building and the landlord has not indicated any desire to sell it. WIA has the second Right of Refusal on the building. NAPA Auto Parts has the first Right of Refusal on the building.
 - b. Have you explored a longer lease? WIA currently has a five-year lease on the building with the option to renew it. In light of WIA's current financial position, a financial obligation beyond five-years is not advisable at this point in time.
 - c. Have you looked into other opportunities for locations? Not yet. However, the identification of a property for purchase should take place in the next 12 months since it will take three to five years for a capital campaign.
2. Do you currently have a waitlist for counseling services? Yes. Technically, counselors do not keep a waitlist because they do not want to keep someone waiting who may have an acute psychological issue. Instead, when the counselor has reached his/her capacity for seeing clients, s/he will refer the requesting clients to other counselors who may have availability. Last week, WIA's licensed counselor made ten referrals because her schedule is so full. The MSU intern counselors systematically referred out clients.
- a. How much will this renovation increase capacity for counseling services? Currently, WIA only has two counseling offices -- one room large enough for a family and one room that is only large enough for a couple at the most. With this renovation, WIA would have five private counseling rooms – two rooms large enough for family counseling, and three rooms large enough for couples counseling including a room that is ADA compliant. At present, none of WIA's counseling rooms are ADA compliant, nor is the building. The renovation would also provide for a large group therapy room that can be used for support groups and counselor training, and, two sound-proof booths where people can privately access tele-counseling, online support groups and coaching. Currently, WIA does not have any admin spaces. The renovation would provide an office for WIA staff, too.
3. What work will be done for \$5,000,000 (as outlined in project application) in FY24 & FY25? The identification of a parcel or building for a permanent counseling center, the architectural drawings of the building or its remodel, and possibly initial construction.

4. The project application indicates that this is a one-year project based on the start date of 7/1/22 and the end date of 6/30/23. Based on other information in the application it is our understanding that this is the first phase of a multi-phase, multi-year project. What is the anticipated completion date of all phases of this project? [The next year \(7/22-6/23\) focuses on making the building we are currently occupying appropriate for professional behavioral health services. WIA will endeavor to minimize construction costs and maximize equipment and software procurement that can be taken to the next location.](#)
5. Why should this be 100% funded by resort tax? [WIA is requesting BSRAD to cover the initial costs of the remodel project. The subsequent costs will be covered by grant requests, individual donors and in-kind contributions. WIA will engage teams of community members to decorate the rooms in a "Design a Kind Space" project whereby the teams will donate the furniture and decorations to the rooms. WIA will also solicit in-kind contributions from local contractors and building supply vendors. For the procurement of a building, WIA will launch a capital campaign and WIA envisions requesting funds from ELEVATE BIG SKY, foundations who contribute to capital campaigns, and individual donors.](#)
6. What other counseling service locations, if any, are available in Big Sky? [The hospital and BASE \(Ally Wold\) are the only ones I am aware of.](#)
 - a. Are they at full capacity? [Unable to answer on their behalf, however, I am aware that the hospital has had difficulty in recruiting a full-time counselor.](#)
 - b. What, if any, is different about your proposed counseling service hub than other locations in the community? [WIA's counseling hub enables and incentivizes private practitioners to serve Big Sky through free office space, guaranteed payment to the counselors in alignment with our sliding scale, and our local outreach that will direct clients toward their services.](#)
7. Have you received a bid for this work and confirmed a contractor? [WIA has discussed the project with a few contractors yet we did not want to engage any contractors until we knew that the funding would be forthcoming.](#)

Project Name: Counseling Services Hub – Equipment

Project Questions:

8. What are the metrics for the goals outlined on the project application?
 - a. Goal 1. To strengthen WIA's collaboration with MSU's MA in Counseling program and thereby attract more MSU interns and faculty to provide counseling, supervision of counselors and behavioral health trainings in Big Sky. [Additional MSU counselors, additional Memos of Understanding for programming with MSU including MSU's use of the WIA building as a training site.](#)
 - b. Goal 2. To provide Big Sky residents, including employees living in dormitories, with multiple counseling options including tele-counseling. [Client numbers from industries \(WIA's counselors collect non-identifying client information including the industry where the client works, e.g. resorts, hospitality, construction, education, public services\) and calendared reservations to use the soundproof booth counseling rooms for tele-counseling.](#)
 - c. Goal 3. To provide counselors with free office space in order to attract them to offer their services in Big Sky as opposed to other locations. [Calendared hours of room usage.](#)

- d. Goal 4. To elevate the professional appearance of WIA's counseling facilities and instill higher esteem in our clients for the therapeutic experience. Participation in the “Design a Kind Space” redecoration project, and, client satisfaction surveys.
- 9. Will this equipment be able to be utilized in an alternate space? Yes. WIA will try to maximize the expenditures on transferable assets.
- 10. Why should this be 100% funded by resort tax? WIA is requesting BSRAD to cover the initial costs of the remodel project. The subsequent costs will be covered by grant requests, individual donors and in-kind contributions. WIA will engage teams of community members to decorate the rooms in a “Design a Kind Space” project whereby the teams will donate the furniture and decorations to the rooms. WIA will also solicit in-kind contributions from local contractors and building supply vendors.



FY23 DISTRICT QUESTIONS

Sponsor: Warren Miller Performing Arts Center

Sponsor Questions:

1. Please provide the names of the individuals that will be representing your organization at the Review Meetings:
 - a. June 6: **John Zirkle**
 - b. June 9: **John Zirkle**

2. Does your organization seek funding from sources outside of the BSRAD boundary?

Yes. These are mostly from regional arts and social service foundations including the One Valley Foundation, the Montana Arts Council, the Western States Arts Federation, and the National Endowment for the Arts. We also seek support from various national foundations from time to time, depending on the arts project at hand. More recently, because of the many foundations that we have been developing over the last decade, we have also leveraged our artistic partnerships to defray production costs with regional institutions in Montana as well as national groups. Examples of this include the Montana Chamber Music Society, Roots in the Sky NFP, James Sewell Ballet, the Ellen Theater, the Alberta Bair Theater, The Crossing, and more.

3. How is your organization adapting to current statewide and local cost of living increases and the national workforce crisis?

We try to approach our staffing situation realistically. For example, we are currently nearing the end of a search for our second full-time employee, and have limited our search to local and regional talent who wouldn't need to relocate here in order to be successful in the job. It's a tough reality, but one that we have accepted for the time being. Additionally, since we are hiring many artists on a very short-term basis, the living situation doesn't apply to us as strongly as it might other organizations. Though, booking artists has certainly been much more difficult and costly than in past years, which is affecting how quickly we can move on projects. We apply the same logic at Resort Tax to a regional base, which is that we are better together. So WMPAC works extra hard to try and partner with other theaters and presenters in the region to keep costs shared among multiple institutions and supporting artists so that they can sustain their efforts in the great reemergence after the last two years.

4. What was the source of Other Public Funding in the Previous FY outlined in the Sponsor Efficiency Worksheet?

This was from Round 1 and Round 2 of the Social Services Nonprofit Grants through the Montana Coronavirus Relief Grant program made available through the CARES Act. We received \$10,000 in the first round, and \$65,388 in the second round. These are of course nonrenewable sources of funding.

5. Do current art and entertainment facilities address Big Sky's arts and culture needs?

What a great question! I think this will always be a wonderful dialogue to keep going, especially in the next few years. While I admit my own bias, I still feel strongly that the answer to this is YES. As I have said for many years, WMPAC still has so much room to grow, and its capacity has the ability to serve the community, even as it grows like we have seen in the last few years. With the addition of more venues and facilities like Tips Up, The Independent, and BASE, there is plenty of room to address current needs within the infrastructure that already exists in Big Sky. My philosophy is that we should focus on people over buildings at this point.

Project Name: Annual Cultural Programming at WMPAC

Project Questions:

1. The application listed a Strategy rather than an Initiative outlined in the [2022 Our Big Sky Update](#). Which **Initiative** is this project working to achieve?

Thank you for allowing us to clarify! The initiative we are mostly working to achieve is to "Promote Big Sky as a Year-round Arts and Cultural Destination." That's why we refer to our project always as annual cultural programming at WMPAC. As the community continues to grow, we will aim to provide more programming at a healthy frequency throughout all seasons of the year. Our current focus is Winter, Fall, and Summer, and we will start to aim for more programming in the off-seasons like Spring and early Fall as we continue to get our legs back under us after a tumultuous couple years.

2. How do measure affordability in ticket pricing?

This is a difficult question to answer, as pricing in Big Sky can go anywhere between FREE and \$5,000 per ticket for people who call Big Sky home who are attending an event. Our average ticket for Winter is projected to be \$38.46, which is just under the national average, but above our best guess at a regional average for comparable experiences. We are also sensitive to being realistic about the long road to recovery in a post-pandemic world. We look at national averages (\$40.62 from in 2019, which is the last reliable year for data), regional comps (\$18 - \$40 on average), previous year baselines (\$32 average), supply & demand analyses from each show, and lastly, we ask our customers and community members. We also know that because disposable income is harder to come by these days (see question 3 😊), we are sensitive to the community's needs to not break the bank on event tickets while still retaining value and buy-in from our earned base.

3. I know you began offering more shows catered for the local community during the off season this past year, how well were those attended?

Very well attended. We began our official Fall Series in 2019, and the inaugural season saw a quintupling from the year before, when we had presented more one-offs and other non-branded series. This was a key indicator to us that there was an unmet demand that we had stimulated during the months of October and November. We are proud to say that in the fall of 2021, even with the rise of Delta occurring and required masking in the theater, we **INCREASED attendance from pre-pandemic levels in 2019 by 12%.**