



Proposal

INCORPORATION EXPLORATION STUDY

Prepared for:

BIG SKY RESORT AREA DISTRICT

Due: April 15, 2024

EPS #243030

Prepared by:

 **Economic & Planning
Systems, Inc.**

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Exhibit 'B'

Complete and include as page one (1) of your submittal

Acknowledge Addendums

1. _____	4. _____
2. _____	5. _____
3. _____	6. _____

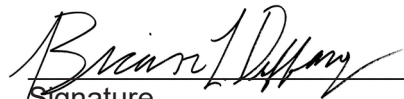
Total contract price: \$ 390,000
(if supplemental pricing detail is required, attach it to the back of Exhibit 'B')

Acknowledge terms and conditions of contract (yes/no) yes

AGREEMENT TO TERMS & CONDITIONS

THE UNDERSIGNED IS DULY AUTHORIZED TO BIND THE COMPANY NAMED BELOW AND HEREBY AGREES TO ALL THE TERMS AND CONDITIONS IN THE FOREGOING REQUEST FOR PROPOSALS

Economic & Planning Systems, Inc.
Company Name



Signature
Brian L. Duffany, Principal

4/12/2024
Date

PROPOSED COST

EPS agrees to complete the above work program on a time and materials basis not to exceed \$390,000. The approximate level of effort by task and staff level is shown in Table 1. EPS may allocate budget across tasks, firms, and staff so long as the total budget is not exceeded. The budget would only be exceeded with written agreement through a change order by the client.

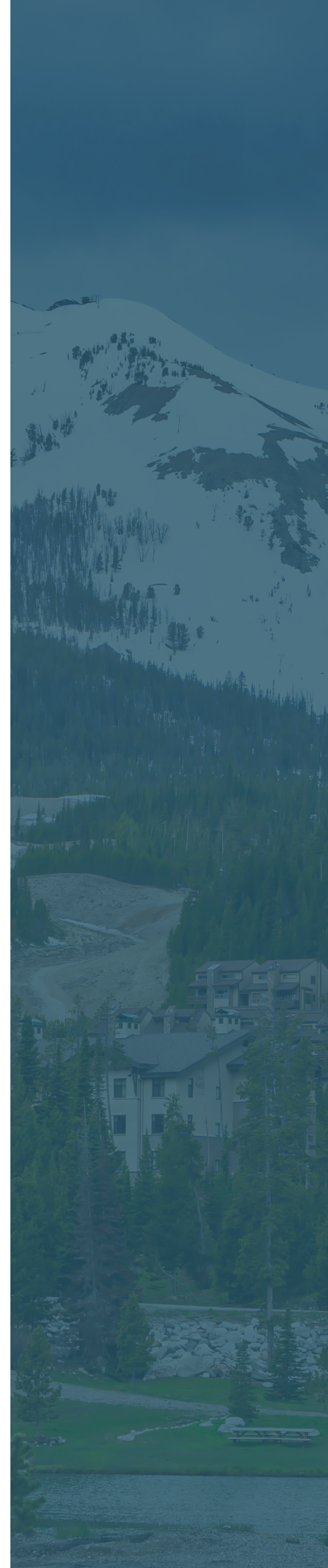
Table 1. Proposed Cost by Task and Staff

Task	S.C. or Pub. Meeting (IP / V)	EPS				Sanderson Stewart				EPS	SS	Expenses & Travel	Total
		Principal-in-Charge	Senior Principal	Associate/ Sr. Associate ¹	Research	Assoc. Principals	Senior Engineer	Project Engineer/ Sr. Designer	Planner/ Designer				
Billing Rate		\$250	\$260	\$163	\$120	\$200	\$210	\$145	\$120				
Phase I - Incorporation Options and Scenarios, Engagement Plan		84	68	140	16	140	40	56	132	\$63,350	\$60,360	\$4,350	\$128,060
Task 1. Project Formation and Project Management	In Person	40	16	40	0	48	0	0	24	\$20,660	\$12,480	\$0	\$33,140
Task 2. Steering Committee Kickoff		20	8	20	0	20	8	0	8	\$10,330	\$6,640	\$3,600	\$20,570
Task 3. Project Website		4	0	8	0	12	0	0	60	\$2,300	\$9,600	\$0	\$11,900
Task 4. Existing Conditions		8	8	40	16	16	32	40	24	\$12,500	\$18,600	\$750	\$31,850
Task 5. Incorporation Options, Requirements, and Powers	Virtual	8	24	16	0	32	0	16	0	\$10,840	\$8,720	\$0	\$19,560
Task 6. Define Incorporation Scenarios for Analysis		4	12	16	0	12	0	0	16	\$6,720	\$4,320	\$0	\$11,040
Phase II: Financial Analysis		61	32	208	28	28	28	32	16	\$60,730	\$18,040	\$0	\$78,770
Task 7. Growth Forecast		4	0	16	4	4	4	8	8	\$4,080	\$3,760	\$0	\$7,840
Task 8. Operating Budgets		12	0	40	0	0	0	0	0	\$9,500	\$0	\$0	\$9,500
Task 9. Capital Costs and Maintenance		8	0	40	8	0	24	24	8	\$9,460	\$9,480	\$0	\$18,940
Task 10. Debt and Financing		8	8	40	0	0	0	0	0	\$10,580	\$0	\$0	\$10,580
Task 11. Role of or Impacts to Resort Tax		5	12	24	0	16	0	0	0	\$8,270	\$3,200	\$0	\$11,470
Task 12. Tax Rates and Other Revenues		8	4	24	8	4	0	0	0	\$7,900	\$800	\$0	\$8,700
Task 13. Financial Analysis Findings Report		16	8	24	8	4	0	0	0	\$10,940	\$800	\$0	\$11,740
Phase III: Findings and Study Roll Out		88	28	120	8	72	8	56	56	\$49,740	\$30,920	\$24,000	\$104,660
Task 14. Steering Committee Workshop	In Person	24	16	32	0	24	0	16	16	\$15,360	\$9,040	\$3,600	\$28,000
Task 15. Analysis Revisions (as needed)		8	12	32	0	0	0	0	0	\$10,320	\$0	\$0	\$10,320
Task 16. Community Open Houses	In Person	24	0	24	0	24	8	24	24	\$9,900	\$12,840	\$2,700	\$25,440
Task 17. Round Table Discussions	In Person	24	0	24	0	20	0	16	8	\$9,900	\$7,280	\$2,700	\$19,880
Task 18. Community Survey		8	0	8	8	4	0	0	8	\$4,260	\$1,760	\$15,000	\$21,020
Phase IV: Findings and Next Steps		52	56	124	8	80	0	64	8	\$48,670	\$26,240	\$3,600	\$78,510
Task 19. Engagement Synthesis and Steering Committee Workshop	In Person	24	16	24	0	24	0	16	0	\$14,060	\$7,120	\$3,600	\$24,780
Task 20. Draft and Final Reports		16	24	60	8	24	0	24	8	\$20,950	\$9,240	\$0	\$30,190
Task 21. Alternative Funding and Financing Mechanisms		12	16	40	0	32	0	24	0	\$13,660	\$9,880	\$0	\$23,540
Total Cost		285	184	592	60	320	76	208	212	\$222,490	\$135,560	\$31,950	\$390,000

¹ Average rate for Senior Associate (\$175/hr) and Associate (\$150/hr)

Source: Economic & Planning Systems

1 Cover Letter



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April 12, 2024

Mr. Daniel Bierschwale
Executive Director
Big Sky Resort Area District
11 Lone Peak Drive, Suite 204
Big Sky, MT 59716

Subject: Proposal for Incorporation Exploration Study; EPS #243030

Dear Mr. Bierschwale:

Economic and Planning Systems (EPS) is pleased to submit this proposal to provide consulting services for the Big Sky Incorporation Exploration Study. We want to help the Big Sky community understand how this important and complex decision will affect the community's future.

EPS is a full-service land economics consulting firm with 52 professional staff in offices in Denver, Colorado and Oakland, Sacramento, and Los Angeles, California. The firm was established in 1983 and has a broad practice in market and financial analysis, public finance, fiscal and economic impact analysis, affordable housing, and land use policy. We have extensive experience in fiscal and financial evaluation of governance options, including incorporation and taxing district formation studies.

We bring a combination of local and national experience. In 2014 we prepared a housing strategy for the Chamber of Commerce that is being implemented. We have been working with the City of Bozeman since 2017 and are currently working with Gallatin County on affordable housing and land use strategies. Our partner, Sanderson Stewart, is based in Bozeman and the key staff from each firm have worked together on several projects. They will strengthen our team with expertise on Montana tax structure and land use law, and also with detailed understanding of development conditions, the geography, and stakeholders.

Brian Duffany, Principal with EPS, will be the project manager and primary point of contact. Brian has led the firm's work in Gallatin County since 2017. Additionally, he is an expert in municipal fiscal and financial analysis. Daniel R. Guimond, Senior Principal of EPS, will be a key advisor bringing 40 years of experience in municipal governance and finance, and in mountain community economics.

From Sanderson Stewart, the point people will be Lauren Waterton and Chris Naumann, Associate Principals. Lauren is a community and economic development planner with nearly 30 years of experience, mostly in Montana.

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Suite 630
Denver, CO 80202
303 623 3557

Denver
Los Angeles
Oakland
Sacramento

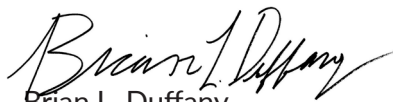
Chris has 17 years of experience in the public and private sectors in planning and economic development, including as the Executive Director of the Downtown Bozeman Partnership. Both have experience working in Big Sky.

We want to emphasize that we have made our best effort in preparing a budget for this community process and complex technical study. One of our firm's core values is collaboration with our clients, and we are very open to discussing and modifying the scope and level of effort (cost) to best meet your needs and available funding for it.

EPS attests that it has no existing or potential conflicts of interest on this project. Our proposal response follows this letter as outlined in the RFP. Please let me know if you have any questions or need further information. We look forward to assisting you with this important assignment.

Sincerely,

ECONOMIC & PLANNING SYSTEMS, INC.


Brian L. Duffany
Principal

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2 Proposal



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2 Proposal

UNDERSTANDING OF NEED

Big Sky is evolving from a nascent purpose-built destination mountain resort into a complex and maturing community. The economy is closely tied to Big Sky Resort, one of the largest resorts in North America, and the Yellowstone Club. The area has attracted very high net worth people who live there full- and part-time and own vacation homes. The year-round population of Big Sky (the Census Designated Place or CDP) is about 2,900 people full time and there are about 3,400 housing units. The Big Sky Chamber of Commerce estimates that winter and summer visitors add another 3,000 to 4,000 people during busy periods, more than doubling the resident population.

The Big Sky CDP is an unincorporated area spanning Gallatin and Madison Counties. The resort base area is in Madison County, and more year-round residents are in Gallatin County. Property owners in Madison County pay Madison County taxes to the County government, schools, and hospital district yet use little if any of their services. The entire area has much closer economic ties to Gallatin County, the City of Bozeman, and the Bozeman-Yellowstone Airport. Big Sky has some of the highest concentration of real estate development activity and wealth in the region, which is creating more service demands while residents and property owners are becoming more concerned about how growth is affecting quality of life and property values.

As an unincorporated area made up of numerous HOAs and water and sewer districts, there is no centralized authority with the powers to address the needs of a growing and changing community. County governments in Montana have very limited powers and funding resources and are not equipped to manage rapid growth and municipal scale development. While the area is thriving and has more resources (money) than most other areas of Gallatin and Madison Counties, there are questions if Big Sky can sustain itself without more local control to raise its own revenues (taxation powers), manage its growth more closely (land use and zoning powers), and to make its own laws and regulations to maintain the desired quality of life.

The community has discussed incorporation in the past and is now ready to look at it in more detail in order to answer questions people have been asking for years. The most concrete question is how much it will cost and how it will affect people's property tax bills. Others are wondering what the community gains or loses with incorporation; is more power to regulate good or bad for the economy?

Another key question is also what role the Resort Tax plays in incorporation. The 4.0% Resort Tax collected by the Big Sky Resort Area District (District), authorized by voters in 1992, brought in over \$20.0 million in 2023. The District funds operations and capital projects in fire protection, the Chamber of Commerce, arts, education, transit and infrastructure, and affordable housing in partnership with the Big Sky Housing Trust. There are concerns that incorporation would siphon off money from this funding source that has allowed the community to fund amenities and services it could not have otherwise .

APPROACH

EPS and Sanderson Stewart want to help the Big Sky community consider this pivotal and historic decision. Our role as consultants is to provide objective information and analysis to help the community make informed decisions about its future, based on sound information and analysis. Our Work Plan outlined below includes robust technical analysis to quantify the costs, and a thorough and transparent process to engage the community and keep them informed. The Work Plan is phased to build towards findings and recommendations incrementally so that the community understands how they were reached.

Proposed Work Plan

Our proposed Work Plan was developed from our understanding of the Big Sky community; Montana law and tax structure; and experience with incorporation, annexation, and working in mountain communities. This is a complex project with many potential directions. It is therefore difficult at this initial stage to design a scope of work that anticipates the different directions the project may need to go and issues that we will need to address. While we believe this Work Plan provides a good overall approach as a starting place, we are open to your thoughts on how it might need to be modified.

The Work Plan is divided into four phases outlined below and then described in more detail.

- **Phase I** – The first steps are to ‘get organized’ by creating a steering or advisory committee, a technical committee, outlining a public engagement strategy, a pro/con analysis of incorporation, and an existing conditions assessment. At the end of Phase I we will also sketch out the incorporation scenarios on which to do more detailed financial analysis.
- **Phase II** – This phase will produce the cost, revenue, and tax rate analysis to answer the critical questions of how much it will cost to incorporate, what services and capital facilities need to be provided, and what the tax rates to property owners will be.

- **Phase III** – After the technical work, we roll out the initial findings in community meetings and open houses, round table discussions, and potentially field a community survey for broader input and reactions. This input will be critical in helping the community decide on which options to pursue, if any.
- **Phase IV** – In the last phase, we synthesize the findings from the outreach and technical work and collaborate with the Steering Committee to make a recommendation to the community. There is also a task that can be used to explore other options for funding capital projects and operations, including tax increment for economic development districts (TEDD).

Phase I: Incorporation Options and Scenarios, and Engagement Plan

Task 1. Project Formation and Project Management

The first task covers general project management throughout the contract period, including regular check-in meetings with the District's point person(s) and Steering Committee. Task 1 also includes the major elements described below.

- **Kickoff meeting** – An initial video conference with the District to establish and discuss the overall work plan, committee membership, key stakeholders, data/information needs, and key questions and concerns.
- **Technical Committee formation** – We propose forming a Technical Committee that will oversee and advise on the legal and financial analysis aspects of the project. This can be people with experience with the District and other key service providers and potentially key property owners. We suggest a small committee of two to four people. The role of this committee is to provide critical review of the analysis, and to contribute their knowledge of the important financial considerations that need to be addressed.
- **Steering Committee formation** – The Steering Committee is envisioned as a group representing the broader Big Sky community. We suggest a committee of about 8 to 12 people representing long-time and new residents, service providers, community groups, major employers, and potentially key property owners.
- **Initial stakeholder identification** – We will also need to engage individually or in small groups with other stakeholders and will identify an initial list of those groups and individuals.
- **Data collection** – We will prepare a list of information needs in collaboration with the Technical Committee and District point person.

Task 2. Steering Committee Kickoff

We propose an early meeting with the Steering Committee in parallel with the existing conditions work. The consultants will prepare enough material to communicate some of the initial options, benefits, and risks/costs of incorporation to have a discussion with the Steering Committee. The main purpose is to familiarize them with the work plan and issues, and to hear their concerns and ideas.

We have budgeted for an in-person meeting in conjunction with a community tour and data collection as part of the existing conditions analysis.

Meeting: Steering Committee

Task 3. Project Website

Sanderson Stewart will create a Project Website or coordinate with the District to use its existing communications platforms (e.g., social media, other engagement and communication platforms). The website will contain content describing the project and key deliverables and other information. Meeting times and engagement opportunities will also be provided. Steering Committee meeting summaries will also be posted to keep the process transparent to the community.

Task 4. Existing Conditions

The Consultants will prepare an existing conditions analysis and assemble the information and data needed to define and perform the financial analysis of incorporation options.

Costs and revenue structure

EPS will compile tax rates, assessed value by area, and revenue trends from the District and County. We will also gather budget information on any operating costs and the capital budget and budgeting process for the District.

Service providers

A key issue in this project will be documenting and considering the numerous services provided in different areas of Big Sky by the District, the Counties, HOAs, and special districts such as schools, water and sewer, fire protection, law enforcement, and infrastructure maintenance (e.g., roads and parks/recreation).

The Consultants, with input from the Technical Committee, will inventory and map each major service provider, taxing district, HOA, and other organizations. We will create a matrix of services provided, revenues collected, and annual operating budget where available. Contracts for services (e.g., Gallatin County Sheriff) will also be inventoried.

Major infrastructure and facility inventory

The Consultants (Sanderson Stewart lead) will map and inventory the major infrastructure in Big Sky. This includes roads, water and wastewater systems (public and private/special district), parks, trails, recreation facilities, and public facility buildings. These data will be organized in a way to show what the geographic coverage is, who owns or controls them, and who maintains them. Any data on annual operating costs will also be assembled.

We want to note that it is often impractical and costly to consolidate special districts upon incorporation (and annexation). They often have different levels of debt and rates/user fees that result in increased costs to some and decreased costs to others. Also, existing infrastructure may be built to different engineering standards and have various levels of deferred maintenance, thus creating challenges if systems are combined. We will note these issues as well.

Task 5. Incorporation Options, Requirements, and Powers

The Consultants will prepare a concise and accessible memorandum summarizing the options available for incorporation, the process, and new powers that a municipality will have. We request support from the District's legal counsel on legal matters, including access to any earlier work on these topics. EPS and Sanderson Stewart do, however, understand the tax structure, basic municipal powers, and especially their powers in land use regulation which is a key issue in Big Sky. The topics we will examine include the following.

- **Size class** – With a population of about 2,900, Big Sky would likely be a Third Class Municipality (pop. 1,000-4,999) under Montana law. The main distinctions in size class are around what fire protection services need to be provided, and Big Sky would likely be able to keep its current arrangement with the Big Sky Fire Department.
- **What services are required** – By law, municipalities need to provide certain services such as a municipal court and law enforcement. Most municipalities find it to be in their interest to provide others such as code enforcement, building and planning review/regulation, business licensing, finance and clerk for revenue collection and budgeting. Some can be provided by the municipality or by special districts and contracts with other providers. We will document what is required and what is typical in other communities.
- **General Powers or Self Government** – The community will need to decide if it wishes to be Self-Governing or incorporate as a General Powers municipality. Self-Government gives some expanded powers to adopt many of its own laws and regulations, though these would still be limited by State law.

- **Taxation and fees** – Big Sky would be able to, and likely need to, collect its own property tax and would retain more of its own revenues. New revenues would be needed to fund the services the community wants to provide. Big Sky could also collect development impact fees to fund infrastructure. The working assumption for now is that the Resort Tax status would not be affected by incorporation.
- **Impacts to other jurisdictions** – Determine if there needs to be consideration or analysis of changes to revenues or costs to other jurisdictions and taxing districts.
- **Land use regulation** – As a municipality, Big Sky would have more control over land use regulation, building code, public works standards, and zoning. Big Sky has zoning currently, and although the Counties involve the community in land use policy, the Counties’ powers are more limited and Big Sky zoning is still under the Counties’ jurisdiction.

Task 6. Define Incorporation Scenarios for Analysis

Towards the end of Phase I, we need to start defining the options to be evaluated for incorporation. The biggest question this study needs to answer is how much it will cost the community, especially to individual taxpayers. In this task, we will frame the options or scenarios to analyze in collaboration with the Technical and Steering Committees. As we get into the technical analysis, some details may need to shift but we nevertheless will establish a working framework. The considerations we have identified initially are outlined below.

- **Geographic area** – One of the first considerations is what area to incorporate. We will consider factors such as population, assessed value, important economic and community assets, infrastructure capacity, and growth and development patterns.
- **Taxing districts, governments, and services provided** – Municipalities may incorporate across County lines. Much of Big Sky is in Madison County although there is little economic or commuting relationship with it. We also need to consider what special districts would overlap and how services will continue to be provided. Define scenarios for potential annexation or consolidation of special districts under the new municipal government.
- **Infrastructure and facilities** – Examine what infrastructure and facilities, including schools, may be important to have within the municipality and whether that is an important factor. Also make assumptions on what infrastructure may be taken over by the municipality, or continued to be maintained through special districts, HOAs, or contracting.
- **Stakeholder and property owner interest** – There is also a political aspect to consider: what property owners and what areas of the community have the greatest interest or aversion to incorporation? More input on this factor will emerge during the engagement process.

The Consultant Team will outline options, working with the Technical Committee, and present those for discussion to the Steering Committee. We expect to end by examining two to three scenarios in the Phase II technical analysis.

Phase I Deliverables and Outcomes

- Steering Committee and stakeholder identification
- Existing conditions summary report
- Incorporation overview memorandum
- Definition of incorporation scenarios for financial analysis in Phase II

Phase I Meetings/Engagement

- Project Management and Technical Committee meetings
- Two Steering Committee Meetings

Phase II: Financial Analysis

Phase III comprises the financial analysis to determine the costs of incorporation and then the revenues that are needed to pay for the services and infrastructure under each scenario (2 to 3). An important consideration overlaid on this Phase is the role of the Resort Tax. The work plan is outlined below, knowing that there is a lot of detail to be uncovered over the course of the work.

Task 7. Growth Forecast

- Project land development including housing units, population, non-residential space, and taxable value out for 20 to 30 years. This will inform the revenue and cost analysis.
- Incorporate land use data on entitled and unbuilt projects and vacant developable land to inform the projections

Task 8. Operating Budgets

- Determine the operations requirements for each scenario such as number and type of departments, staffing, and annual payroll and other operating and overhead costs. We will make our own estimates and also refer to other communities in Montana for ideas on scaling.

Task 9. Capital Costs and Maintenance

- Determine what if any new facilities are needed to house municipal government. Estimate the size and costs of buildings like a general city hall and administrative building, public works maintenance facility, and others to be determined.

- Depending on what if any infrastructure becomes the responsibility of the municipality, estimate annual maintenance costs including capital replacement cycles. This could include roads, parks, trails, stormwater, and water and sewer systems.

Task 10. Debt and Financing

- If major facilities need to be constructed or acquired, calculate any debt that may be needed including the resulting debt mill levy.
- If any special districts are to be annexed, determine the impacts of taking on their debt including the property tax rate needed.

Task 11. Role of or Impacts to Resort Tax

The Resort Tax is the primary funding mechanism and pays for a wide range of community projects and benefits. An important consideration is if or how the Resort Tax can be kept whole, or how much may need to be diverted to fund operations and capital costs.

The analysis will look at ways to balance property tax with the existing Resort Tax. For example, if the Resort Tax is used to pay for some operations, it would reduce the property tax needed. On the other hand, diverting Resort Tax revenues to operations reduces the projects it can fund. This is an important balance that the study needs to consider.

Task 12. Tax Rates and Other Revenues

- Estimate other revenues, such as fees for services and user charges, and other sources to offset service costs. Consider including development impact fees as a capital funding source.
- Calculate the annual property tax revenue needed to fund operations in each scenario, including the resulting mill levy rate.
- Show how inclusion or keeping whole the resort tax would affect the property tax requirements and resulting mill levy.

Task 13. Financial Analysis Findings Report

- Prepare a summary report (draft and final) that synthesizes the key findings, assumptions, and techniques used in the financial analysis. Circulate to the Technical and Steering Committees for review

Phase II Deliverables and Outcomes

- Definition of incorporation scenarios for financial analysis in Phase II (2-3 scenarios anticipated)

- Descriptions and quantification of municipal government structure, departments, staffing, and capital facilities and major equipment needed
- Operating and capital budgets for each scenario
- Resulting property tax rates and role of Resort Tax

Phase II Meetings/Engagement

- 2-3 Technical Committee Meetings

Phase III: Findings and Study Roll Out

This phase of work includes a community process to communicate the objective findings from the research and analysis.

Task 14. Steering Committee Workshop

- Prepare an Executive Summary presentation for the Steering Committee
- Meet with the Steering Committee to review the findings from the financial analysis. Discuss the results and take input on any major changes that need to be addressed prior to communicating results to the public.

Task 15. Analysis Revisions (as needed)

- Make any needed revisions to the Phase II work based on input from the Steering Committee. Redistribute revised Phase II and Executive Summary materials.

Task 16. Community Open Houses

- Schedule and arrange venues for two in-person community open house events. These will be attended and facilitated by senior consultant staff to ensure that questions can be answered, and that experienced people are present to help address issues as they arise.
- Structure a discussion to get input on key questions related to incorporation.
- Compile notes on comments, questions, and general sentiment on the initial findings and incorporation options.

Task 17. Round Table Discussions

The public open houses will allow us to reach more people and obtain general input on the process. We also propose a series of “round table” or focus group-type discussions with key stakeholders and groups. These can include major property owners and real estate interests, HOAs, community groups and non-profits, and districts and other service providers. We suggest not having individual one-on-one meetings in order to provide equal access to this study process.

Task 18. Community Survey

- Determine with the Steering Committee if a community survey should be used to gain additional input. The survey will be hosted online for efficient distribution and compilation.
- Design a community survey to get input on the findings and options.
- Work with local stakeholders to utilize email and social media distribution channels.
- Report results to the Steering Committee and on the project website.
- A budget placeholder of \$15,000 is included in case an additional consultant is needed to support the survey effort.

Phase IV: Findings and Next Steps

The last phase of work will provide direction to the community and policymakers on incorporation or other options for getting more control in the key areas of revenues and land use and development.

Task 19. Engagement Synthesis and Steering Committee Workshop

The Consultants will synthesize the findings and interpretations from the engagement in preparation to report back to the Steering Committee. We will prepare a slide deck that uses the engagement findings to inform an initial reaction on direction for the Steering Committee to consider.

We will facilitate a Steering Committee meeting to get agreement on the direction for the community, options or alternatives to annexation, and next steps.

Task 20. Draft and Final Reports

This study and process will have produced interim deliverables along the way. We envision the final deliverable to be a summary of the recommendations and key findings. It will be written and designed in a way as to be accessible to a broad audience of stakeholders and the community, with technical back up available in previous deliverables and appendices.

Two drafts for Steering and Technical Committee review will be provided, followed by a final report.

Meeting: Steering Committee

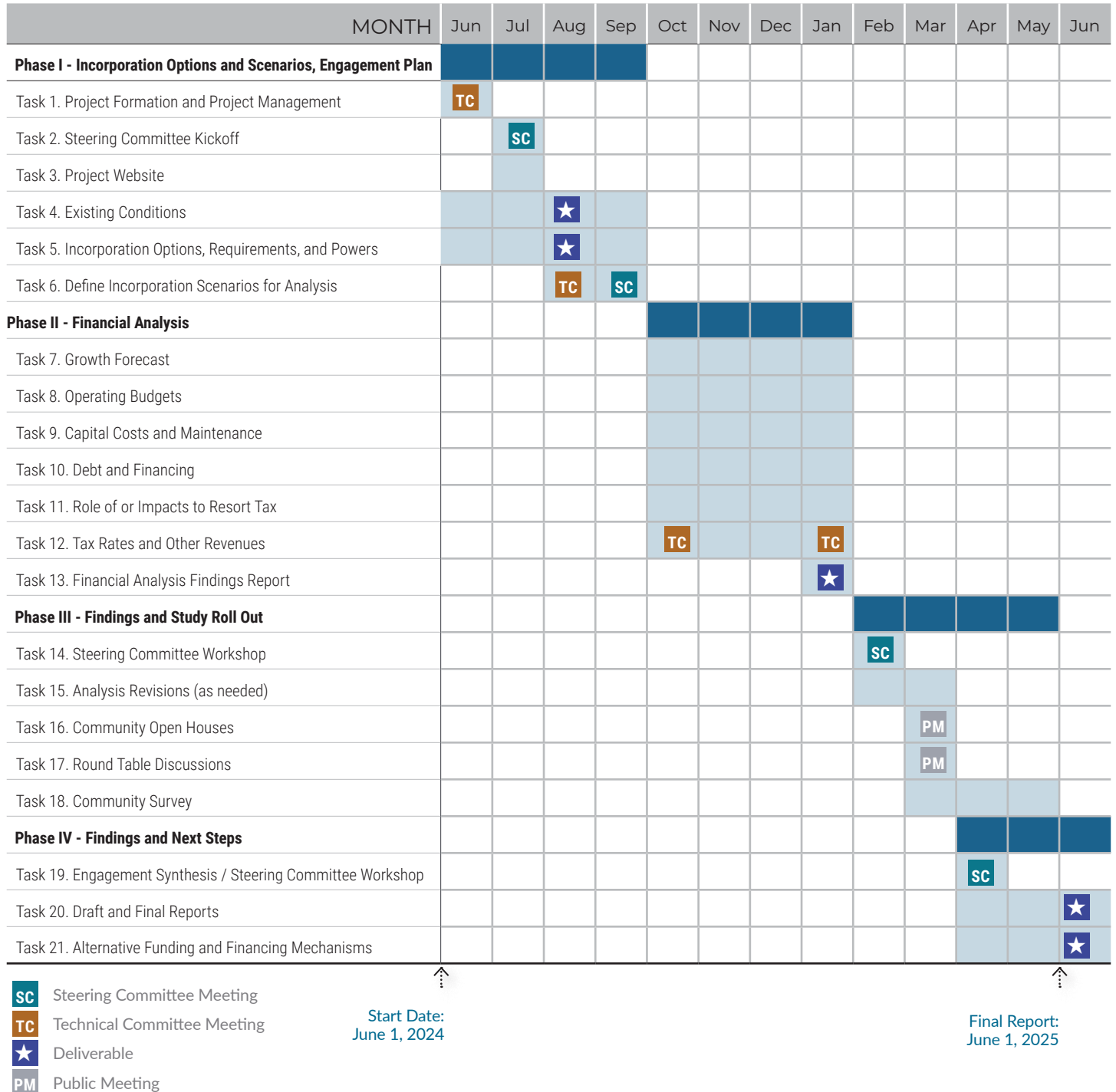
Task 21. Alternative Funding and Financing Mechanisms

This task is not necessarily sequenced in Phase III and may need to be addressed earlier. There are ongoing discussions in Big Sky on creating a TEDD district, a form of a tax increment financing district that Counties are able to create in Montana. The role of a TEDD with or without incorporation can be evaluated. There may also be other forms of government that could be considered such as a larger umbrella HOA or special district. We will work with the Steering and Technical Committees to identify other options for evaluation.

ANTICIPATED TIMELINE

EPS proposes to complete the scope of work within a 12 month period of the initial notice to proceed as shown in **Figure 1**.

Figure 1. Proposed Project Timeline



EXPERIENCE AND PROJECT TEAM AVAILABILITY

Brian Duffany, Principal, will lead the market and feasibility analysis tasks. Based in Denver, Brian has over 20 years' experience in real estate market and feasibility analysis; affordable and workforce housing strategies and policy; and economic and community development. He has led market studies and financial feasibility analyses for all real estate types including residential, industrial, office, and retail/commercial in communities of all sizes. Brian has worked extensively in amenity-rich and mountain communities and has experience and understanding of the unique market pressures affecting demand and feasibility for locals' housing affecting these places.

Weekly Availability: 25-75% depending on project needs and milestones

Daniel R. Guimond, Senior Principal, will be the co-project manager. Dan has advised state, county, city, and special districts on government organization issues including incorporation, annexation, and district formation. His fiscal analysis experience includes large master planned communities including development forecasting and analysis of alternative service provision models. He has also been involved in state legislation impacting local governments including tax initiatives such as the Colorado Regional Tourism Act and HB-1348 changes to the Colorado Urban Renewal Statutes.

Weekly Availability: 25-50% depending on project needs and milestones

Colton Harguth, Senior Associate, joined EPS in 2021 after three years with the City of Littleton's Economic Development Department. He has experience developing rigorous pro forma cash flow models that test project feasibility and estimate profits among partners in real estate transactions. Colton is skilled at collecting, analyzing, and presenting data to deliver findings that support the overall project narrative and resonate with both public and private sector stakeholders.

Weekly Availability: 40-80% depending on project needs and milestones

Sushma Pramod and **Christian Carroll**, Associates, will be the lead analysts for EPS. Sushma has six years of experience with a background in affordable housing entitlements and outreach for the New York City Department of Housing Preservation and Development. Sushma was EPS' analyst on the Ilium Valley Market Study sponsored by the Town of Mountain Village.

Weekly Availability: 40-80% depending on project needs and milestones

Lauren Waterton, Sanderson Stewart Associate Principal, will support the team with expertise in community planning, land use regulation expertise, and community outreach experience. Lauren has nearly 30 years of experience in community, infrastructure, and economic development planning in Montana and the mountain west.

Weekly Availability: 25-75% depending on project needs and milestones

Chris Naumann, Associate Principal, will support the team with his experience in local economic development, taxing district and tax increment financing implementation, and community process facilitation.

Weekly Availability: 25-75% depending on project needs and milestones

Other Sanderson Stewart staff are available as needed to bring specific expertise to the project, particularly on infrastructure, as needed.



Brian Duffany

Principal

Education

Master of Regional Planning, Cornell University

Bachelor of Arts, Colby College

Employment History

25 Years Experience

20 Years with EPS

Affiliations

American Planning Association

Urban Land Institute

Colorado Municipal League

Awards

Downtown Colorado, Inc. Governor's Best Plan Award – *City of Englewood Economic Development Strategic Plan*

American Planning Association, Colorado Chapter – *West Vail Master Plan*

Speaking Engagements

TIF for TAT: Urban Renewal After HB 15-1348, Rocky Mountain Land Use Institute Conference, 2018

Streetcar Economics, American Planning Association Conference, 2010



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The Economics of Land Use

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Brian Duffany is a real estate economist and planner with over 20 years' experience in land economics. Brian has a broad base of experience in real estate development feasibility analysis, workforce housing, financial and economic modeling, economic development, economic and demographic analysis, local government finance, fiscal impact analysis, and transportation planning. Much of his work is in mountain, rural, and amenity gateway communities. In this context, Brian helps communities understand the market and economic forces shaping them. His work includes housing strategy and policies, comprehensive and neighborhood planning, and impact fee programs.

SELECTED PROJECT EXPERIENCE

- Land Use Economics Consulting Support | Bozeman, MT
- Gallatin Valley Economic Vitality Strategy | Bozeman, MT
- Growth Policy Update | Bozeman, MT
- Beartooth RC&D Regional Housing Needs Assessment
- Laurel Gateway Urban Renewal Plan | Laurel, MT
- Targeted Economic Development District Feasibility Study | Lockwood (Yellowstone County), MT
- Brown Ranch Annexation Negotiations | Steamboat Springs, CO
- East Aurora Annexation Study | Aurora, CO
- Cost of Growth Study | Basalt, CO
- Cost of Growth Study | Commerce City, CO
- Capital Facilities Funding and Impact Fee Study | Fort Collins, CO
- Revenue Diversification and Capital Funding Study | Avon, CO
- Short Term Rental Policy Study | Telluride, CO
- Short Term Rental Economic Impact and Regulatory Fee | Breckenridge, CO
- West Vail Master Plan | Vail, CO
- St. Anthony Summit Hospital Development Advisory | Summit County, CO
- Base Area and Main Street Retail Strategies | Steamboat Springs, CO
- Employee Housing Strategic Plan | Roaring Fork Valley Transportation Authority (Aspen-Glenwood Springs, CO)



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bduffany@epsdenver.com



Daniel R. Guimond

Senior Principal

Daniel Guimond is a real estate economist and planner with over 35 years' experience in economic and financial analysis and development planning for the public and private sectors. Dan has advised cities, counties, state, and federal agencies on a range of land use and economic development issues, including preparation of comprehensive and economic development plans and strategies, capital improvement programs, economic and fiscal impact analyses, and project development feasibility and funding. He has also specialized in government organization and public financing including impact fee nexus studies, special district formations, annexation analyses, and incorporation evaluations.

Education

M.A., Urban Geography,
University of Colorado

B.A., Political Science,
University of Colorado,

Employment History

24 Years with EPS

35+ Years Experience

Affiliations

American Planning
Association

Urban Land Institute

International Downtown
Association

Denver Planning Board,
1992 to 2005

ICSC Colorado Alliance

SELECTED PROJECT MANAGEMENT EXPERIENCE

- The Woodlands Incorporation Fiscal Analysis | The Woodlands, TX
- Housing Strategy Plan | Big Sky, MT
- Growth Policy Update | Bozeman, MT
- Downtown Housing Strategy | Billings, MT
- Flagstaff Housing and Sustainability Study | Flagstaff, AZ
- Affordable Housing Needs and Policy Analysis | Basalt, CO
- Housing Affordability Policy Study | Fort Collins, CO
- East Aurora Annexation Study | Aurora, CO
- Long Range Capital Projects Financing Study | Adams County, CO
- Community College District Cost of Growth Study | Santa Fe County, NM
- Larimer County Regional TIF Study | Larimer County, CO
- Fiscal Impact and Cost of Growth Analysis | Basalt, CO
- Mesa del Sol Public Finance and Fiscal Analysis | Albuquerque, NM
- Regional Tourism Act Project Review | State of Colorado
- Downtown Retail Strategy | Steamboat Springs, CO
- Base Area Real Estate Consulting | Snowmass Village, CO
- Impact Study and Transportation Plan | Winter Park/Fraser Valley, CO
- Affordable Housing Land Bank Property Development Strategy | Fort Collins, CO



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dguimond@epsdenver.com



Colton Harguth

Senior Associate

Colton Harguth has expertise in all of EPS's core practice areas, with a specific focus on economic development, fiscal and economic impact analysis, real estate economics, and public finance. He has worked on a variety of projects across the western United States and has a strong appetite for complexity and formulating creative solutions. Colton is skilled collecting, analyzing, and presenting data to deliver findings that support the overall project narrative.

Education

B.A. in Economics
University of Colorado at
Colorado Springs, Magna
Cum Laude, 2018

Python for Data Science
Certificate, Cornell
University

Certified Economic
Developer (CEcD),
Oklahoma University
Economic Development
Institute (in progress)

Employment History

6 Years Experience

3.5 Years with EPS

Previous Experience

City of Littleton, Economic
Development Specialist,
2018-2021

SELECTED PROJECT EXPERIENCE

- Amara Annexation Fiscal and Economic Impacts | Colorado Springs, CO
- Lodge by the Blue Annexation Fiscal Impact Analysis | Blue River, CO
- On-Call Fiscal Analyses | Castle Rock, CO
- Housing Proposals Financial Evaluation | Albuquerque, NM
- Tax Increment Financing (TIF) Application Reviews | Bozeman, MT
- El Paso Fiscal Impact Analysis | El Paso, TX
- San Antonio Housing Authority Alazan Redevelopment | San Antonio, TX
- Inland Port Industrial Market Study | Salt Lake City, UT
- Port Colorado Economic and Fiscal Impact Evaluation | Aurora, CO
- Ladera Development Incentive Analysis | Timnath, CO
- Uplands Equity Evaluation | Westminster, CO
- Winrock Mall Revenue Forecasts | Albuquerque, NM
- Retail and Mixed-Use Market Analysis | Littleton, CO
- Future Legends BID Financial Valuation | Windsor, CO
- Economic Incentive Policy Review | Timnath, CO
- Ralston Commons URA Commercial Property Financial Valuation | Arvada, CO
- 48th and Harvest Road Industrial Market Analysis | Aurora, CO
- P3 Confluence Gap Analysis | Parker, CO
- Olde Town URA Financial Evaluation | Arvada, CO



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Sushma Pramod

Associate

Education

Master of Urban Planning,
University of Illinois at
Urbana-Champaign

Bachelor of Architecture.
Visvesvaraya
Technological University

Employment History

6 Years Experience

Previous Experience

NYC Dept. of Housing
Preservation and
Development, New York
City, 2019-2023

Sushma Pramod joined EPS in 2023 following nearly four years with the NYC Department of Housing Preservation and Development where she managed city-sponsored affordable housing projects through predevelopment. At EPS, she primarily works on projects that determine market demand and on affordable housing policies in resort communities. Sushma is eager to leverage her expertise to develop policies supported by sound real estate solutions, to ultimately champion the interests of the diverse communities she serves, advocating for sustainable, inclusive, and vibrant local landscapes.

SELECTED PROJECT EXPERIENCE

● CURRENT EPS PROJECTS

- Future Land Use Map and Housing Strategy | Gallatin County, MT
- Bozeman 2023 Market Update | Bozeman, MT
- Winter Park Revenue Forecasts | Winter Park, CO
- Goliad Road Revitalization Plan | San Antonio, TX
- URA Lutheran Legacy Campus Plan Area | Wheat Ridge, CO
- Market and Disposition Strategies | Lakewood, CO
- Industrial Lands Study Update | Denver, CO
- RFTA Employee Housing Strategy | Roaring Fork Valley, CO
- Housing Needs Study | Basalt, CO
- Ilium Affordable Housing Development | Mountain Village, CO
- Housing Affordability Implementation Plan | Oklahoma City, OK
- Comprehensive Plan Update | El Paso, TX
- Density Bonus Program Assessment | Austin, TX

● NYC DEPT. OF HOUSING PRESERVATION AND DEVELOPMENT

- Senior Planner
 - Managed a diverse portfolio of City-sponsored affordable housing projects, facilitating over 1,200 units across various housing types.
 - Liaised with stakeholders, including developers, community organizations, City agencies, elected representatives, and residents, to advance affordable housing initiatives.
 - Participated in community outreach and facilitated small group discussions on housing development and neighborhood plans.
 - Presented projects at public hearings for Community Boards, Borough Presidents, City Planning Commission, and City Council.
 - Analyzed development trends, market dynamics, affordability gaps, and housing policies, presenting findings through maps, charts, and memos.
 - Prepared documents for discretionary approvals, including ULURP, Council and Mayoral approval packages, and public-facing materials on land use and zoning.



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Christian Carroll, AICP

Associate

Education

Master of Urban and Regional Planning, University of Michigan

Bachelor of Science in Geography from Grand Valley State University

Certificate in Geographic Information Systems (GIS), Grand Valley State University

Certificate in Real Estate Development, University of Michigan

Employment History

6 Years Experience

Affiliations

American Institute of Certified Planners

American Planning Association

Christian Carroll joined EPS in 2023 after nearly five years of public planning work with the City of Novi and DeWitt Charter Township in Michigan. His work focuses on projects that aim to promote public well-being through innovative financing mechanisms, public-private partnerships, and collaborative decision-making. Christian has a broad range of professional experience including site plan review, environmental protection, and housing policy. Christian has a passion for housing equity, community and economic development, and sustainability.

SELECTED PROJECT EXPERIENCE

- Manitou Special Tax District Feasibility Study | Manitou Springs, CO
- Estes Park RTZ Revenue Forecast | Estes Park, CO
- Bozeman Real Estate TIF Review | Bozeman, MT
- Capital Expansion Fee Nexus Study | Fort Collins, CO
- Mesa Media Film Studio Economic Impact Analysis | Albuquerque, NM
- New Braunfels Real Estate Feasibility and P3 | New Braunfels, TX
- Equitable Housing Fee Study | Loveland, CO
- Land Needs Assessment and Action Plan | Oklahoma City, OK
- VIA Real Estate Portfolio Strategic Options | San Antonio, TX

● CITY OF NOVI, MICHIGAN - PLANNER

- Conducted site plan reviews using the zoning ordinance, code of ordinances, master plan, and agency review comments.
- Created woodland, wetland, zoning, fire coverage, and historic asset maps using GIS.
- Assisted in the creation and implementation of new ordinances with the Planning Commission and City Council including a new ordinance for self-storage facilities.
- Presented to the public at various City meetings including the Planning Commission, City Council, and other subcommittees
- Managed and organized review meetings with potential stakeholders.

● DEWITT TOWNSHIP, MICHIGAN - PLANNER

- Administered site plan reviews using the zoning ordinance, code of ordinances, master plan, and agency review comments.
- Developed zoning, non-motorized, police route, and land value maps using GIS.
- Collaborated with staff to develop a zoning overlay district for mixed-use developments and presented such findings to the Planning Commission and Township Board.



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LAUREN WATERTON, AICP

Lauren brings 29 years of experience in planning, development and design, in both the public and private sector. Her work focuses on connecting the strategies and planning tools needed to address the unique conditions of small and rural communities. She has a diverse background in urban planning and design with experience in master planning, site analysis, downtown plans, and design review. As Associate Principal, Land Development Division Director, and Placemaking Studio Manager, she bridges the engineering, landscape architecture and planning disciplines to create plans and environments that support communities and enhance the lives of residents. She combines an understanding of the planning process and a commitment to helping clients discover and implement new ideas to create unique communities.

EDUCATION

Portland State University, Portland, Oregon
 Master of Urban and Regional Planning, 1994

Rhodes College, Memphis, Tennessee
 B.A., Urban Studies, 1991

PROFESSIONAL REGISTRATION

American Institute of Certified Planners, 1997

PROFESSIONAL & CIVIC AFFILIATIONS

American Planning Association, Planners' Advocacy Network

Montana Association of Planners

Advisory Committee, Bozeman Unified Development Code Update, 2015-2017

Bozeman Planning Board, 2016-Present

Planning Coordinating Committee, Bozeman Representative, 2016-2020

HONORS & AWARDS

AICP - National Student Award for Creating a Better Tomorrow, 1996

Oregon Chapter APA Student Project Award for Creating a Better Tomorrow, 1995

PROFESSIONAL TRAINING

Greater Yellowstone Framework for Sustainable Development, Yellowstone Business Partnership 2009

Historical and Architectural Survey Workshop, Colorado Historical Society, 2004

EXPERIENCE

Project Manager/Senior Planner: responsible for project visioning, planning and design, public outreach, document preparation and overall project oversight.

- Lockwood TEDD Strategic Plan, Yellowstone County, Montana
- City of Bozeman Urban Renewal Districts Misc. Services, Bozeman, Montana
- City of Bozeman Midtown Strategic Action Plan, Bozeman, Montana
- Spanish Peaks Resort, Development Services, Big Sky, Montana
- Gallatin County Triangle Planning Study and Triangle Trails Plan, Gallatin County, Montana
- City of Williston Annexation, Williston, North Dakota
- City of Billings 5th Avenue North Corridor Feasibility Study, Billings, Montana
- EBURD Downtown Billings Housing Study & Site Feasibility, Billings, Montana
- Anaconda Downtown Master Plan, Anaconda, Montana
- City of Laurel TIF District Strategy Plan, Laurel, Montana
- City of Billings Safe Routes to School Study Update Phase II, Billings, Montana
- Lockwood Pedestrian Safety District On-Call Services and Non-Motorized Plan Update, Yellowstone County, Montana
- City of Billings Inner Belt Loop Corridor Study, Billings, Montana
- Anaconda-Deer Lodge County Housing Study, Anaconda, Montana



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CHRIS NAUMANN

As an Associate and Senior Planner in the Placemaking Studio, Chris brings a distinct perspective on urban planning and community building. With 17 years experience as an urban place management leader, Chris bridges the gap between the public and private sectors with a collaborative approach. He focuses on planning to achieve the triple bottom line of cultural, economic, and environmental sustainability. As the Executive Director of the Downtown Bozeman Partnership, he became well versed in the best practices of urban planning, multi-modal mobility, placemaking, and municipal development regulations. He has extensive interdisciplinary experience in public engagement, strategic planning, project management, and public private partnerships. Chris was also an independent downtown business owner. He has a deep understanding of Main Street, downtown, and central business districts.



EDUCATION

Lawrence University, Bachelor of Arts with Honors, 1991

PROFESSIONAL & CIVIC AFFILIATIONS

Greater Yellowstone Coalition National Council, 2018-present

Bozeman Fiber Board, 2017-present

Northern Rockies Economic Development District Board, 2010-present

City of Bozeman Climate Plan Leadership Team, 2009, 2011, 2020

City of Bozeman Parking Commission, 2009-2018

Bozeman Sports Parks Foundation Board, 2015-2018

Greater Yellowstone Coalition Board of Directors, 2010-2017

Bozeman Sports Park Committee, 2012-2015

Bozeman Economic Development Plan Advisory Committee, 2008-2010

PROFESSIONAL TRAINING

Project Management Professional Development Course, Montana State University, 2019

Emerging Leaders Fellowship, International Downtown Association, 2018

EXPERIENCE

Senior Planner: duties include community and land planning task management, public outreach strategic community engagement, document research and plan preparation.

- Bozeman Health Subarea Plan, Bozeman, Montana
- City of Bozeman Fowler Avenue Public Engagement Plan, Bozeman, Montana
- Gallatin County Triangle Area Trails Plan, Gallatin County, Montana
- City of Billings Safe Routes to School Plan Ph II, Billings, Montana
- City of Billings 5th Avenue North Corridor Feasibility Study, Billings, Montana
- City of Bozeman Urban Renewal District TIF District Assistance, Bozeman, Montana
- Gallatin County Growth Policy, Gallatin County, Montana

Executive Director, Downtown Bozeman Partnership [2007-2020] duties included executive leadership, community engagement, public private partnerships, government relations, project management, strategic planning.

- Downtown Bozeman Improvement Plan, 2019
- Downtown Strategic Parking Management Plan, 2016
- Downtown Streetscape Design, 2015, 2011, 2009
- Downtown Parking Wayfinding Signage Design/Build, 2011
- Downtown Bozeman Improvement Plan, 2009
- Developed Tax Increment Finance Grants (Technical Assistance, Life-Safety, Streetscape, Fiber Connectivity, Residential Incentive, Hotel Incentive)



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EDUCATION

Colorado School of Mines, Golden
M.S., Civil & Environmental Engineering, 2013

Colorado School of Mines, Golden
B.S., Environmental Engineering, 2012

PROFESSIONAL REGISTRATION

Professional Engineer, Montana #60177

Professional Engineer, Colorado #52409

Professional Engineer, Washington #55862

PROFESSIONAL & CIVIC AFFILIATIONS

American Society of Civil Engineers, member

American Water Works Association, Rocky
Mountain Section, member

PROFESSIONAL TRAINING

AFT Impulse Waterhammer & Surge Analysis
Training, 2017

AECOM HEC-RAS 2D Training, 2016

Innovyze InfoWater Training, 2015

BOBBY EGERG, PE

As the Bozeman Land Development Manager and a member of the Water Studio, Bobby has 12 years of professional experience in site development and master planning including parking lots, roadways, utilities, hydrologic and hydraulic engineering, and stormwater management. Bobby's experience includes water modeling, hydraulic analysis, stormwater design, and GIS applications.

His expertise includes modeling and software applications including InfoWater, InfoSewer, StormCAD, HydroCAD, EPANET, PCSWMM, AHYMO, AFT Impulse, HEC-RAS, HEC-HMS, ArcGIS, ArcPro, ArcMap, AutoCAD Civil 3D, ReMi, MATLAB, and Visual Basic.

EXPERIENCE

Senior Engineer: Hydraulics Engineer performing hydraulic/hydrologic analysis, design and modeling.

- Billings Clinic Bozeman Campus Construction Administration, On and Off-site Improvements, Bozeman, Montana
- Bozeman Health Campus Master Plan, Bozeman, Montana
- North Park Master Planning, Master Site Plan, and Site Development Plan, Bozeman, Montana
- West Post Subdivision Design, Construction Administration, and Staking, Bozeman, Montana
- Bozeman Health Connections Clinic, Bozeman, Montana
- Billings Clinic Bozeman Campus Design, On and Off-site Improvements, Bozeman, Montana
- Wheatland Memorial Hospital, Harlowtown, Montana
- Bear Canyon Trailhead & Parking Lot Design, Gallatin County, Montana
- The Yard Multi-use Development On & Off-site Improvements, Bozeman, Montana
- St. Johns United Townhomes, Billings, Montana
- InterUrban Apartments Phase II Master Site Design, Billings, Montana
- Livingston West LLC Major Subdivision, Livingston, Montana
- Main Street Hotel Site Development, Bozeman, Montana



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EDUCATION

Montana State University, Bozeman M.S., Civil Engineering, 2010
 B.S., Civil Engineering, 2009

PROFESSIONAL REGISTRATION

Professional Engineer, Colorado #57689,
 Montana #28335 PE, South Dakota #14930, Nevada #031911

Professional Traffic Operations Engineer #3908
 PTOE

Road Safety Professional (Level 1) #121 RSP1

PROFESSIONAL & CIVIC AFFILIATIONS

Institute of Transportation Engineers (ITE),
 MT Chapter, Intermountain Section,
 Western District & International, Member

USTA MT Director/Treasurer, 2016-present

MT Sharptail NAVHDA Treasurer, 2016-2021

PROFESSIONAL TRAINING

PTV Group VISSIM and VISTRO Workshop, 2019

Road Safety Professional Certification Refresher
 Course, Transportation Professional Certification
 Board, 2018

HONORS & AWARDS

LeadershipITE Class of 2016

JOEY STASZCZUK, PE, PTOE, RSP1

As an Associate, Senior Engineer, and the Community Transportation Studio Manager, Joey is responsible for roadway design, traffic operations and impact analysis, and research-related activities for a variety of transportation and land development projects. He has experience in the geometric design, operations analysis, and traffic impact assessment and utilizes Synchro, VISSIM, VISTRO, SIDRA, and more. He is also the lead traffic engineer for Sanderson Stewart's state DOT projects. For DOT projects, Joey is responsible for highway geometric design, passing lane analysis, signing and striping, detailed sign designs, microsimulation, and traffic analysis. Joey is also responsible for coordination of all traffic data collection.

EXPERIENCE

Project Manager/Senior Engineer: responsible for traffic operations and impact analysis, geometric design, and signing and striping design for the following projects at Sanderson Stewart. He is also responsible for coordination of all traffic data collection.

- Big Sky Transportation Study, Big Sky, Montana
- MT Hwy 64 Improvements, Big Sky, Montana
- Ousel Falls Road & MT Hwy 64 Traffic Signal, Big Sky, Montana
- Big Sky Medical Center Traffic Impact Study, Big Sky, Montana
- Big Sky Comprehensive Traffic Study, Gallatin + Madison County, Montana
- Yellowstone County Impact Fee Study/On-Call Traffic Engineering Services, Billings, Montana
- Yellowstone County Intersection Modifications, Yellowstone County, Montana
- US 191/MT 64 Feasibility Study + ITS Recommendations, Gallatin and Madison Counties, Montana
- City of Bozeman On-Call Transportation Engineering Term Contract, Bozeman, Montana
- City of Bozeman Urban Renewal Districts Misc. Services, Bozeman, Montana
- City of Belgrade W.O. 22-03 Dry Creek Road Cruiser Lane Spooner Road Roundabout, Belgrade, Montana
- City of Bozeman South 3rd and Graf Intersection Improvements, Bozeman, Montana



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DIANE TOLHURST

Diane is a Communications Coordinator for the Branding Studio with 18 years of applicable communications, graphic design, web design, marketing, outreach, and events experience. After graduating from Michigan State, she joined the Peace Corps in Mali, West Africa. There, she learned French and Bambara and received training in economics, marketing, and business organization, and local customs. Diane served as the City of Bozeman's Development Review Coordinator, providing guidance and coordination on the development review process, fostering relationships between applicants and staff, and offering solutions to customer inquiries. With an M.S. in Communication paired with her work in the public sector, Diane is uniquely qualified to lead the firm's public outreach and stakeholder outreach tasks.

EDUCATION

University of Tennessee, Knoxville
M.S., Communication, 2020

Michigan State University, East Lansing
B.A, Interdisciplinary Studies in Social Science -
Human Resources and Society with a business
emphasis, 2008

PROFESSIONAL CERTIFICATION

IAP2 Certificate, "Fundamentals of Public
Participation"

IAP2 Certificate, "Designing & Leading Public
Participation"

IAP2 Certificate, "Applying Methods for Public
Participation"

CITI Program Certification, Social -Behavioral -
Educational Focus, Institutional Review Boards
(IRB) Human Subjects Protection

PROFESSIONAL & CIVIC AFFILIATIONS

City of Bozeman, Safety Committee Member

City of Bozeman, Technical and Operations
Collaborative Committee (TOCC) Former Lead

U.S.A Track and Field, Level 1 Coach

US Americorps VISTA Community Based Asset
Building Volunteer

US Peace Corps, Small Enterprise Developer

PROFESSIONAL TRAINING

LeadStrat, The Effective Facilitator Training, 2021

PUBLICATIONS & PRESENTATIONS

Master's Thesis, "Emotional Destruction: How
Supervisors Can Transform a Subordinate's
Emotions Toward the Workplace"

EXPERIENCE

Public Outreach & Project Coordination: duties include visioning and public outreach tools/materials development, public meetings, marketing and outreach materials creation, project team coordination

- City of Helena Mini 5 Points Roundabout Feasibility Study Public Outreach, Helena, Montana
- City of Billings Pedestrian and Bicycle Master Plan Update, Billings, Montana
- Yellowstone County West Billings Neighborhood Plan Public Outreach, Billings, Montana
- Old Yellowstone Trail Feasibility, Rails to Trails Conservancy, Park County, Montana
- City of Belgrade Dry Creek/Spooner/Cruiser Roundabout Public Engagement, Belgrade, Montana
- Montana State University Grant Street Pedestrian Plaza Improvements, Bozeman, Montana
- Kagy Boulevard, South 19th to Willson Outreach, Bozeman, Montana
- City of Bozeman Fowler Avenue Connection Project, Bozeman, Montana

Professional experience prior to joining Sanderson Stewart:

- City of Bozeman Community Development Department, Development Review Coordinator, Bozeman, Montana
- University of Tennessee, College of Nursing, Research Information Specialist, Knoxville, Tennessee
- Durham County Courthouse, Deputy Clerk - Estates Division, Durham, North Carolina



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REFERENCES AND SIMILAR SERVICE

A photograph of a busy city street scene with people walking and buildings in the background. The image is split into two parts by a diagonal white line. The left part is darker and shows a person walking, while the right part is brighter and shows a group of people walking.

About Economic & Planning Systems

Economic & Planning Systems, Inc. (EPS) is a land economics consulting firm experienced in the full spectrum of services related to real estate development, the financing of public infrastructure and government services, land use and conservation planning, and government organization.

EPS was founded on the principle that real estate development and land use-related public policy should be built on realistic assessment of market forces and economic trends, feasible implementation measures, and recognition of public policy objectives, including provisions for required public facilities and services.

AREAS OF EXPERTISE

- ▶ Real Estate Economics
- ▶ Public Finance
- ▶ Fiscal and Economic Impact Analysis
- ▶ Economic Development
- ▶ Land Use & Transportation
- ▶ Housing Policy
- ▶ Public-Private Partnership (P3)
- ▶ Parks and Open Space Economics

Municipal Incorporation & Annexation Petitions

EPS consults with local governments on incorporation, annexation, and growth policy. To inform incorporation studies, the firm draws from its expertise in related areas of public facility financing, budgeting and operations funding, tax and fee structures and revenue generation, and the overarching subjects of land use and economic development. We prepare estimates of capital and operating costs, required services, and incorporate legal requirements and broader community considerations. On annexation policy, EPS provides public entities with an understanding of options regarding the degree of growth that fulfills community goals and how to regulate that in such a way to maximize economic benefit and minimize fiscal burden. Commonly, the firm provides comprehensive plan implementation measures that include specific criteria to be used by local governments to provide a coherent and implementable plans and strategies. Economic impact studies, impact fee nexus studies, and fiscal balance models are often provided by EPS as part of these larger consulting efforts.

EPS identifies the economic and budgetary implications of land use projects, activities, and policies.

- **Municipal Incorporation, Annexation, and Special District Formations** – EPS consults with cities, districts, and other public entities concerning governance and organizational issues. EPS prepares plans of service and feasibility studies that support the proposal review process. These include projections of costs, determining services needed, tax rate and revenue requirements, and debt financing considerations. EPS works with multidisciplinary teams of planners, engineers, and attorneys in this work.
- **Fiscal Impact Analysis** – EPS helps governments and project proponents to consider the potential municipal net revenue benefits from land use plans and entitlements. Our fiscal impact models estimate tax and other public revenues generated by new development, as well as the cost of public services required to serve the new development. These studies commonly help our clients fine tune land use programs and to identify appropriate mitigations for negative fiscal impacts.
- **Land Use Planning and Growth Management** – EPS combines a thorough working knowledge of land use regulation with its real estate and economic expertise to contribute to land use planning, housing, economic development, and growth management strategies. EPS's roles in land use planning programs typically include economic and demographic forecasts, land use information and market inputs to plan formulation, fiscal and financial evaluation of plan alternatives, and land use policy implementation.
- **Resort and Gateway Community Economics** – EPS has developed a niche practice working in high cost and high amenity communities throughout the Mountain West. Core areas of our work include affordable housing strategies, housing regulatory and mitigation tools, short term rental policy advisement, ski resort base area real estate analysis, and providing the economic and real estate inputs to community and neighborhood/district planning.



Featured Projects

Housing Strategy and Future Land Use Map Update

Gallatin County, Montana

EPS is currently preparing a housing strategy for Gallatin County as part of their Future Land Use Map update process. The work is expected to be completed summer 2024. The main purpose of the assignment is to determine a role for the County in improving housing access, given its limited powers. The team is currently working on developing strategies in zoning and land use policy, funding, and in partnerships with the strong non-profit service provider and housing developer organizations in Gallatin County.

Economic and Real Estate On-Call Services

Bozeman, Montana

EPS is the City's on-call consultant to its Economic Development, Housing, and Urban Renewal department.

- **Urban Renewal TIF Evaluations** – EPS is reviewing real estate development proposals seeking TIF assistance and preparing pro forma analyses to determine if there is a financial case for awarding TIF (“but for” analysis). Many of the projects include affordable housing, which is at times required in order to be eligible for TIF.
- **Economic, Demographic, and Real Estate Market** – EPS prepares an annual real estate and economic update report for the City and its economic development partners.
- **Economic Development Plan** – EPS was subconsultant on an Economic Vitality Strategy (EVS) for the Gallatin Valley, lead by the City of Bozeman. EPS' role was to prepare metrics around socioeconomic and racial equity and support the development of strategies and policies.

In 2017 (outside of this on-call contract), EPS prepared an analysis of economic and real estate trends affecting economic vitality and land use goals. This work helped the City better understand its economy and the opportunities and constraints around real estate development and what types of businesses and development types the City was competitive in attracting.

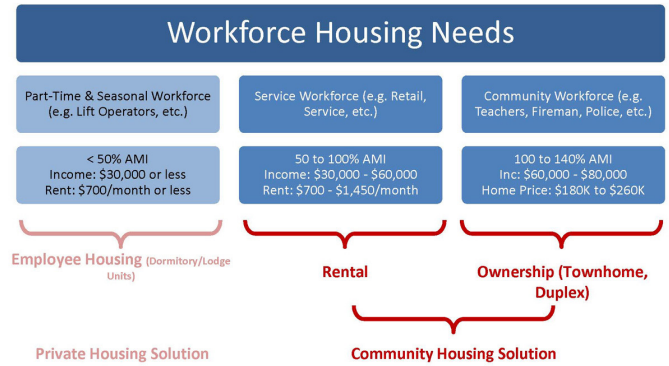
Housing Policy Strategy (2013)

Big Sky, Montana

Big Sky was at a critical point in its evolution from an alpine ski resort to a more diversified year-round resort community. However, during the previous decade, the number of second homes has grown at more than three times the rate of permanent resident occupied housing units, and lodging revenues continued to recover from the Great Recession. Although positive signs for the economy,

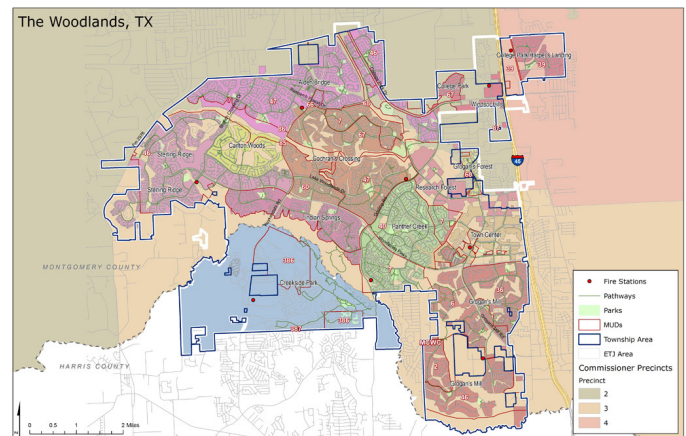
these market drivers were placing development pressure on the community that created challenges, and as the visitation and service industries grew, the need for a larger workforce also grew.

The Big Sky Chamber of Commerce (BSCC) contracted with EPS to address some important underlying questions regarding the issues. EPS assessed economic, demographic, income and wage, housing, and affordability conditions, as well as best practices of regulatory and non-regulatory policy solutions to address the identified challenges. EPS also met with a wide range of stakeholders and community groups and conducted a survey to collect and identify information regarding in-commuting patterns among the community's largest employers. EPS' recommendations were organized into short- and long-term strategies, including the participation of the Chamber in an affordable housing demonstration project, evaluation of the use of Montana's tax increment for economic development districts for offsetting public infrastructure costs associated with affordable housing, exploration of a modified Resort Tax District taxing authority, and the establishment of a non-profit housing organization. Long-term recommendations included evaluating the costs and benefits of incorporation to better address community-based solutions.



The Woodlands Incorporation Study Financial Analysis *Houston, Texas*

The Woodlands Township is an unincorporated, privately developed, master-planned community in North Metro Houston. Approaching its buildout, The Woodlands now includes over 37,000 housing units across eight villages and features 26.5 million square feet of retail and office space. A key provision of the Regional Partnership Agreement (RPA) between the neighboring Cities of Houston and Conroe prevents future annexation and allows The Woodlands to determine its future governance, including the opportunity to incorporate as a city in 2014.



As part of the evaluation process for future incorporation, EPS was engaged to determine the specific financial implications, including the impact to service provision, necessary capital investments, and existing and new revenue sources. EPS developed a comprehensive fiscal model to estimate potential ongoing

budget requirements under incorporation, as well as up front one-time capital expenditures necessary to become a stand-alone city. As part of this analysis, EPS assessed current and future service levels based on a set of peer communities and analyzed the future revenue sources available to The Woodlands as a city under state legislation, including a potentially substantial impact to property taxes.

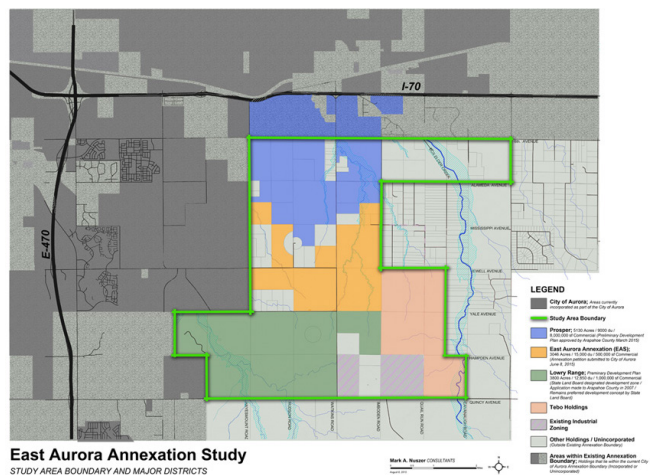
Finally, EPS estimated the impact to water and wastewater utilities, as the existing Municipal Utility Districts (MUDs) that serve the Township would need to be consolidated under incorporation.

West of Steamboat Springs Annexation Consulting (Brown Ranch) *Steamboat Springs, Colorado*

EPS has assisted the City and prospective developers on negotiating cost and revenue sharing arrangements related to the annexation of the 500+ acre Brown Ranch property within the West of Steamboat Springs Area Plan (WSSAP). In 2017, EPS worked as a third party with the City and Brynn Grey Partners to quantify the fiscal impacts of its proposal and to evaluate cost mitigation options, including a special district and a Real Estate Transfer Assessment (RETA). In 2023, EPS was hired by the City to provide peer review and advisory services to support negotiations between the Yampa Valley Housing Authority (YVHA) and the City. The YVHA was gifted the Brown Ranch property and sought to annex the property into the city in 2023 and 2024.

East Aurora Annexation and Fiscal Impact Study *Aurora, Colorado*

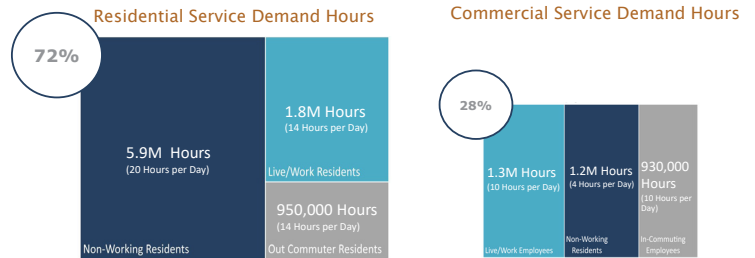
The Aurora City Council directed City staff to evaluate moving the City’s planning and annexation boundary to encompass an additional 30 square miles of exurban and rural agricultural land in Arapahoe County. This study followed a previous study by the City that evaluated the feasibility of becoming a consolidated city and county similar to Broomfield and Denver, upon which no further annexation is allowed under Colorado law. EPS worked with a team of land and community planners, and civil and transportation engineers to develop the land use and infrastructure assumptions needed to prepare the required Comprehensive Plan Amendment and supporting Fiscal Impact Analysis, with EPS being the lead on the Fiscal Impact Analysis.



The fiscal impact analysis estimated that new annexations in the study area would result in a 36 percent increase in population and a 28 percent increase in General Fund expenditures, creating an annual deficit of \$15.1 million per year. The analysis included detailed department level costs and revenues, and capital cost impacts to the City’s water plan and transportation plans. Senior EPS staff presented findings and participated in discussions with City Council and Department heads throughout the study. The City Council ultimately voted against the proposal to expand the City’s planning boundary, citing the fiscal impacts, the balance between supporting infill and redevelopment, and the cost of acquiring the necessary water rights to serve the project. Later, the City Council reversed its decision and proceeded with the Comprehensive Plan amendment.

Amara Annexation Fiscal and Economic Impacts
Colorado Springs, Colorado

La Plata Communities acquired multiple land holdings in Colorado Springs, Colorado, exceeding 5,500 acres, with a vision to develop approximately 9,500 dwelling units and 2.0 million square feet of commercial property on the 3,174-acre Amara site.



EPS was retained to construct a model quantifying the degree of economic and fiscal change in the city based on the buildout of the development. The model reflected the anticipated development program and incorporated fiscal factors based on an evaluation of the City budget and supplemental interviews with key department heads. The final deliverable summarized the revenues and costs associated with each potential land use, showing the positive and negative impacts to the City over a 30-year buildout schedule.

Laurel Gateway URA Development Strategy
Laurel, Montana

Laurel is a small city of 6,000 people 15 minutes west of Billings on I-90. It is a freestanding community with a strong railroad heritage, as BNSF operates the largest freight yard between Chicago and Seattle in Laurel. With good schools and less expensive housing than Billings, Laurel is an attractive place for young families. However, Laurel has struggled with investing in itself to create an attractive gateway, to strengthen its downtown, and to provide other community building amenities. In 2008 Laurel designated the Laurel Urban Renewal Area (LURA) encompassing the Southeast 4th area and the City’s downtown, an 1800’s western main street.



EPS and Sanderson Stewart were hired to prepare a development and investment strategy for LURA to address basic engineering needs as well as public amenities and place making investments to make Laurel more attractive to new businesses and families. EPS prepared a retail and commercial market analysis to evaluate new retail development opportunities for catalyst sites. EPS also evaluated the regional economic development structure, and the regional economy to identify targeted industries to help the City create an economic development program and strategy. While the opportunities for new retail development were determined to be limited based on the proximity to competition in Billings, EPS provided several recommendations on attracting economic base jobs in several targeted industries.

EPS and Sanderson Stewart also prepared a 10 year capital investment plan for LURA that included a menu of projects ranging in size and cost. EPS prepared a cash flow and financing analysis to determine what projects could be financed at what time to assist the City with prioritizing investment.

TEDD Feasibility Study

Lockwood/Yellowstone County, Montana

EPS was a subconsultant to Sanderson Stewart on this project which evaluated the feasibility of creating a Tax Increment for Economic Development District in the Lockwood area of unincorporated Yellowstone County just southeast of Billings. EPS' role was to evaluate real estate market demand for industrial development and to forecast TEDD revenues and financing capacity for infrastructure. EPS prepared a market analysis of the greater Billings industrial market, forecasted absorption, and tax increment revenues. EPS worked with Sanderson Stewart planners and engineers to marry revenue projections with infrastructure costs and property owner interest to make recommendations to BSED that a TEDD would be feasible based on real estate demand if property owners could agree to collaborate on formation.

Capital Expansion Fee Nexus Study

Fort Collins, Colorado

The City of Fort Collins hired EPS to update the Nexus Study supporting its Capital Expansion Fee (CEF) program. The CEF study process was done in the context of high housing costs that continue to increase, concerns about economic and racial equity, and a major update to its water and wastewater connection fees and user rates. EPS helped facilitate conversations with the City Council Finance Committee, drawing on our broad practice areas in affordable housing and community economics to help the City understand the rationale for the fees and the impacts on development, compared to existing residents (only new development pays impact fees).

The technical study included a full inventory of capital facilities and equipment, replacement cost estimates, and the demographic and land use inputs to the fee calculations. EPS explored different fee schedule approaches ranging from a flat fee

to graduated fees based on home size to recognize that smaller homes on average have a lower impact on service demand. The impact fees will be considered for adoption 1Q 2024.

Basalt Fiscal Impact and Cost of Growth Analysis

Basalt, Colorado

EPS developed a comprehensive fiscal model for the Town of Basalt to analyze the fiscal impacts of two large developments in the planning process, Willits Town Center and Stott's Mill. As a second phase of the project, EPS developed a set of net cost of growth factors for a number of prototypical residential products (single family, townhome, and condo) as well as retail and office formats. These net cost of growth factors were presented to staff and stakeholders to better inform the community of the fiscal implications of future land use policy.

Short Term Rental Policy Study

Telluride, Colorado

EPS designed a study and facilitated a process to inform the community and Town Council on the benefits and negative impacts of STRs in the Telluride region economy. The worked started with a conditions study, that inventoried, mapped, and analyzed STR characteristics and market values in the Town. EPS facilitated two community open houses, and three Town Council meetings on the topics to identify and vet various policy approaches including licensing caps, zoning modifications, and a regulatory fee. The Town ultimately relaxed licensing caps and adopted a regulatory fee on STRs that will increase funding for affordable housing.

West Vail Master Plan

Vail, Colorado

EPS was the real estate economics lead for the West Vail Master Plan that won an APA Colorado Chapter Award in 2022. West Vail is the area north of I-70 at exit 173. From a land use and development perspective, Vail is known for its compact, relatively high density, architecturally consistent villages: Vail Village and Lionshead. West Vail is a stark contrast with its 1-3 story buildings and large areas of surface parking. The area presents unique development opportunities in that there are a small number of landowners controlling large properties, including the Town that owns the parking structure and holds a ground lease to City Market.



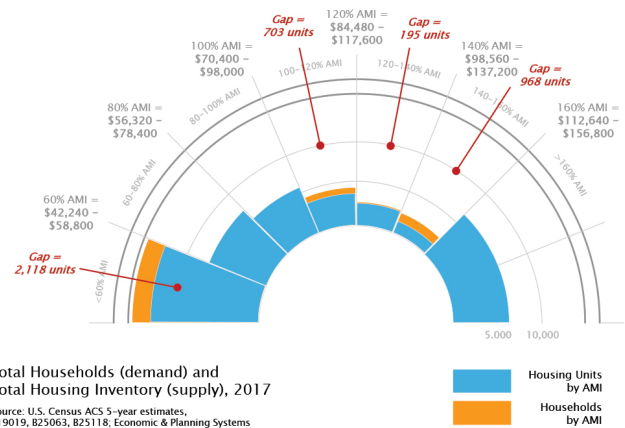
The community process identified a desire to create a more inviting neighborhood center, and to incentivize reinvestment and redevelopment. The area has one of the highest value real estate markets in Colorado; however, the Plan needed to balance creating and preserving affordable housing, and retaining key businesses including two supermarkets (Safeway and City Market) and other local-serving businesses.

EPS worked with the planning and urban design team to design redevelopment scenarios that achieved multiple goals and were financially feasible. EPS used market analysis and built a pro forma feasibility model to determine the level of financial feasibility, public benefits (affordable housing, low cost commercial space) that could be carried by the developments, and where public financing such as TIF could be used as an incentive.

Roaring Fork Valley Regional Housing Study

Aspen to Glenwood Springs and New Castle to Eagle, Colorado

The Roaring Fork Valley has become synonymous with high housing costs, a tight and constrained housing supply, and an ever-expanding commute shed. The discontinuity of affordable housing practices, goals, policies, and initiatives by numerous counties and municipalities makes tackling affordable housing needs and issues an even more challenging problem to solve. For the past few decades, it has been clear that housing needs for the workforce are not being met sufficiently. Years of applying best practices in most of the Valley’s communities has helped many, but left still many more needs unmet.



The goal of this study was to provide a solid foundation from which a regional solution could finally address a regional problem. EPS and its subconsultant, provided an in-depth analysis of workforce needs, a projection of age-and income-specific needs, and a robust foundation from which to communicate the story and issues to local governments, stakeholders, and the public. The team conducted the first-ever regional resident and employer survey to comprehensively assess the perceptions, concerns and housing needs of residents, workers, and employers. The team also pioneered a new methodology for identifying housing gaps by income. The findings revealed subregional under- and over-supplies, interregional dependencies, and a truer picture of the housing needs by income created by each driver of housing demand – factoring in wage and salary workers, proprietors, nonworking residents, in-commuters and out-commuters.

Roaring Fork Transportation Authority

Aspen-Glenwood Springs, Colorado

EPS provided technical assistance, meeting facilitation, and negotiation support to the group of eight local governments that formed the Roaring Fork Regional Transportation Authority (RFTA). EPS worked as a part of a project team composed of local jurisdiction staff and special counsel to implement the first RTA in Colorado. EPS' technical assistance included detailed tax revenue forecasting based on a regional economic model and forecast. EPS also provided meeting facilitation for a policy committee over a six-month period during which the IGA was negotiated, drafted, and approved by seven of the eight participating local governments.

Currently, EPS is working for RFTA to create an employee housing strategy. Like most public agencies and employers in this region, the cost of housing has become crisis levels and is severely affecting their ability to hire and retain front line operations staff needed to provide transit service and maintain fleet. Housing is a challenge even for executive management. EPS is working with staff and its board of directors to chart out a series of actions for the agency including HR policies, incentives and stipends, direct housing assistance, master leasing, and property ownership and development.



Since its beginning in a garage in 1969, Sanderson Stewart has followed the core purpose ***To Plan and Design Enduring Communities*** to become an award-winning community design firm working from 9 offices across Montana, Colorado, Nevada, and Northern California. Our 195+ design professionals provide a comprehensive set of services to our clients including site design & land development; placemaking & landscape architecture; multimodal transportation planning, design & safety; civil infrastructure engineering & design; surveying & mapping; community outreach, branding & visualization services to build and improve the communities and facilities in which we live, work, learn, and play.

We address every project with a multidisciplinary approach we call **Complete Design**. Interdisciplinary collaboration produces better work and a more well-rounded review. Our team members each bring unique technical expertise and background to our projects and review services that, when combined, provide a holistic approach to the entire process. Collaboration from the beginning produces expertly-informed projects more efficiently. We comprehensively identify issues and solutions, rather than passing plans and reports off from one discipline to the next like a baton in a relay race. This approach consistently benefits our clients by being efficient with schedules and helping to mitigate risk.

Relevant Local Experience

Community Engagement

Sanderson Stewart provides services to support community engagement for a variety of projects. From website design to hosting meetings, our dedicated team of community engagement specialists ensures that the community is informed and engaged in projects that matter to them. Recent projects with significant public engagement include Billings Pedestrian & Bicycle Master Plan Update ([billingsbikepedplan](#)), West Billings Neighborhood Plan ([west-billings-plan](#)), Bozeman Health Subarea Plan ([bozeman-health-subarea-plan](#)), Last Chance Gulch Five Points Feasibility ([last-chance-gulch-five-points](#)). These projects include website design, public meetings, social media posts, surveys, and interactive website features.

Big Sky Transportation Studies and Design

Sanderson Stewart has led and supported numerous traffic studies, corridor planning studies, and transportation infrastructure design projects in the Big Sky Area. The Big Sky Transportation Study was commissioned by the Big Sky Chamber of Commerce, with funding support from the Big Sky Resort Tax, Gallatin County, and Madison County. The study aimed to evaluate traffic safety and operations

along the 10-mile MT 64/Lone Mountain Trail corridor. A TIGER grant was secured in 2019, allowing for the design and construction of the recommended improvements.

Sanderson Stewart has completed numerous traffic studies for Big Sky Town Center, Moonlight Basin, Spanish Peaks, and Big Sky Resort. Additionally, we have assisted the Montana Department of Transportation with data collection, engaged with developers to evaluate traffic flow, and assisted the Big Sky Transportation District with assessment for transit design. We are currently a subconsultant to HDR in the 191 Corridor Study.

City of Bozeman Economic Development Division, Urban Renewal Districts Miscellaneous Services, 2016-Present

Sanderson Stewart was selected for an initial three-year term contract in 2016, a second four-year contract in 2019, and a third contract in 2023 to assist the Economic Development Department in completing multiple on-call services throughout all of Bozeman's Urban Renewal Districts. Our team has completed numerous projects in the Midtown District, ranging from the Midtown Strategic Action Plan, to design and construction services for a new Festival Street, park improvements, pathways, and sidewalk projects throughout the District. For the Downtown District, we have completed a Downtown Transportation Study (two phases), a Structured Parking Site Feasibility Study (three phases), Sewer Demand Modeling, and on-call parking services. Sanderson Stewart is also designing Quiet Zone Railroad Crossings on Rouse Avenue and Wallace Avenue for the recently established Pole Yard Urban Renewal District.

Lockwood TEDD Comprehensive Plan Development

The Lockwood Targeted Economic Development District (TEDD) exists to enhance economic opportunities in Yellowstone County, Montana by creating an active business environment by providing planned space for future and current industrial and manufacturing employers. The Yellowstone County Industrial Park Feasibility Study indicated that demand for industrial space outpaced supply, and that many in the area believed that business opportunities had been missed due to the lack of industrial space available. As a result, the TEDD Strategic Plan was created to provide a competitive advantage for Yellowstone County over competing locations for business and professional employment. The work plan and implementation strategies were created for the project's stakeholders to successfully develop the Lockwood TEDD.

Sanderson Stewart, as lead consultant, with EPS as a sub-consultant, created the plan framework, earning buy-in from the numerous project stakeholders including the plan's steering committee, Yellowstone County, Big Sky Economic Development Authority (Big Sky EDA), Lockwood community members, and local property owners. Work included a full market analysis, site analysis including current land

use, transportation and access, and infrastructure, and creation of development and implementation strategies. This culminated in the creation of the Lockwood Targeted Economic Development District in 2016.

Yellowstone County Impact Fee/Project Funding Study

Yellowstone County lacked the mechanisms to generate consistent funding for roadway and intersection improvements either through assessments paid by residents or through standardized developer contributions associated with subdivisions or site developments. In an effort to establish the proper funding programs for its roadway and intersection improvements, Yellowstone County selected Sanderson Stewart to perform this study.

Sanderson Stewart's goal for this project was to comprehensively research and evaluate alternatives and then provide recommendations to the County on the development of a funding program for transportation improvements. The team researched successful funding program options in other communities around the country and government entities in Montana.

Sanderson Stewart used improvements at the intersection of Grand Avenue and 48th Street West as a case study to evaluate how the differing funding mechanisms identified during our research could be utilized. The project team worked with the County to develop a high level design concept for the intersection, providing construction cost estimates, and then evaluated how the funding alternatives could be used. The findings of this study were compiled into a summary report and include the recommended funding mechanisms.

REFERENCES



City of Bozeman

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Director
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bfontenot@BOZEMAN.NET

The Woodlands Township

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Scott Robson
Town Manager
970 728 2155
srobson@telluride-co.gov

Zoe Dohnal
Deputy Town Manager
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Roaring Fork Transportation Authority

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Special Projects Manager
970 384 4891 (RFTA Extension)
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720 334 1710 (Mobile)
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City of Aurora

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Budget Manager
303 739 7070
ghays@auroragov.org

City of Bozeman

David Fine
Urban Renewal Program Manager
406 582 2973
Dfine@bozeman.net

(is also a reference for EPS)

Big Sky Economic Development

Steve Arveschoug
406 869 8401
stevea@bigskyeda.org

Yellowstone County Public Works Department

Tim Miller
406 256 2735
tmiller@yellowstonecountymt.gov

3 Additional Requested Information



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2024 Hourly Billing Rates

Denver Office

Managing Principal	\$275
Senior Principal	\$270
Principal	\$250
Vice President	\$205
Senior Associate	\$175
Associate	\$150
Research Analyst II	\$120
Research Analyst I	\$110
Production and Administrative Staff	\$100

Billing rates updated annually.



CHARGE OUT RATES

EFFECTIVE AUGUST 5, 2023



a sanderson bellecci company

STAFF PERSONNEL SERVICES

Staff Engineer I	\$115.00/hour
Staff Engineer II	\$130.00/hour
Staff Engineer III	\$135.00/hour
Project Engineer I	\$145.00/hour
Project Engineer II	\$150.00/hour
Senior Engineer I	\$185.00/hour
Senior Engineer II	\$210.00/hour
Principal Engineer Intern	\$240.00/hour
Expert Witness/Special Consultant	\$75.00/hour
Staff Planner I	\$290.00/hour
Staff Planner II	\$100.00/hour
Planner I	\$115.00/hour
Planner II	\$130.00/hour
Senior Planner I	\$145.00/hour
Senior Planner II	\$155.00/hour
Senior Planner III	\$195.00/hour
Right-of-Way Agent	\$200.00/hour
Staff Landscape Designer I	\$168.00/hour
Staff Landscape Designer II	\$100.00/hour
Landscape Architect I	\$115.00/hour
Landscape Architect II	\$135.00/hour
Senior Landscape Architect I	\$145.00/hour
Senior Landscape Architect II	\$160.00/hour
Field Survey Technician I	\$175.00/hour
Field Survey Technician II	\$85.00/hour
Staff Surveyor I	\$88.00/hour
Staff Surveyor II	\$110.00/hour
Professional Land Surveyor I	\$125.00/hour
Professional Land Surveyor II	\$135.00/hour
Senior Professional Land Surveyor I	\$148.00/hour
Senior Professional Land Surveyor II	\$160.00/hour
Graphic Artist	\$180.00/hour
CADD Technician I	\$105.00/hour
CADD Technician II	\$100.00/hour
Designer I	\$105.00/hour
Designer II	\$100.00/hour
Senior Designer I	\$110.00/hour
Senior Designer II	\$120.00/hour
Construction Inspector	\$145.00/hour
Construction Engineering Technician	\$88.00/hour
Senior Construction Engineering Technician	\$100.00/hour
Construction Engineer I	\$145.00/hour
Construction Engineer II	\$145.00/hour
	\$150.00/hour

STAFF PERSONNEL SERVICES CONTINUED

Project Administrator	\$100.00/hour
Senior Project Administrator	\$115.00/hour
Administrative/Clerical	\$95.00/hour
Senior Administrative Director	\$185.00/hour
Marketing Coordinator	\$110.00/hour
Senior Marketing Coordinator	\$125.00/hour
Marketing Director	\$175.00/hour

SURVEY CREW SERVICES

I-person/2-person Crew	\$Per Job
Survey Equipment	\$30.00 /fieldwork hour
Survey Vehicle Mileage	IRS Rate/Mile + \$0.10/Mile
Scanner Equipment	\$150.00 /hour
Scanner Equipment (Hourly)	\$150 /hour
Scanner Equipment (Full Day)	\$1,050 /day

OUTSIDE CONSULTANTS

- 1) At cost if independently billed direct to client.
- 2) Cost plus 5% if billed through us.

INDEPENDENT LABORATORIES

- 1) At cost if independently billed direct to client.
- 2) Cost plus 5% if billed through us.

ADMINISTRATIVE EXPENSES

Administrative expenses (including copies, prints, phone, postage, materials, and travel) 3.5% *

* based on professional services only, unless modified by contract

Vehicle Mileage IRS Rate

These rates are updated periodically to reflect market conditions. Rate increases will be reflected in future invoicing.



15937926



STATE OF MONTANA
SECRETARY OF STATE
2024 ANNUAL REPORT

For Office Use Only
STATE OF MONTANA
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SECRETARY OF STATE
File Number: 15937926
Date Filed: 1/4/2024 8:32:29 AM

FILING FEE: WAIVED prior to April 15
FILING FEE: \$35.00 after April 15

Business Type	Domestic Profit Corporation
Business Sub-Type	General For Profit Corporation

Business Name	2024
Annual Report Year	ENGINEERING, INC.
Name of Business Entity	D034607
Montana File Number	United States
Country of Organization	Montana
State of Organization	ANY LAWFUL BUSINESS
Business Purpose	

Shares				
Share Type	Series	Shares Authorized	Shares Issued	Share Par Value
Common		100000	4093	0.0000

Business Mailing Address of Principal Office	1300 N Transtech Way Billings, MT 59102
Address	

Business Physical Address of Principal Office	1300 N Transtech Way Billings, MT 59102
Address	

The registered agent on record is:	MICHAEL SANDERSON Non-Commercial Registered Agent
Registered Agent	Agent Number RA00084022
	Email Address
	Website
	Physical Address 1300 N TRANSTECH WAY BILLINGS, MT 59102
	Mailing Address 1300 N TRANSTECH WAY BILLINGS, MT 59102

Directors			
Full Name	Business Mailing Address	Position	Email Address
DANIELLE R SCHARF	1311 WILDFLOWER WAY Bozeman, MT 59715	Director	dscharf@sandersonstewart.com
RICK D LEUTHOLD	3031 GRAND AVENUE, SUITE 100-1 BILLINGS, MT 59102	Director	rleuthold@sandersonstewart.com
John E Tufte	1412 Freedom Lane Fort Collins, CO 80526	Director	jtufte@sandersonstewart.com

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MICHAEL P SANDERSON	3177 SYCAMORE LANE BILLINGS, MT 59102	Director	msanderson@sandersonstewart.com
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Officers

Full Name	Business Mailing Address	Position	Email Address
DANIELLE R SCHARF	1311 WILDFLOWER WAY Bozeman, MT 59715	Secretary	dscharf@sandersonstewart.com
RICK D LEUTHOLD	3031 GRAND AVENUE, SUITE 100-1 BILLINGS, MT 59102	Vice-president	rleuthold@sandersonstewart.com
John E Tufte	1412 Freedom Lane Fort Collins, CO 80526	Vice-president	jtuft@sandersonstewart.com
MICHAEL P SANDERSON	3177 SYCAMORE LANE BILLINGS, MT 59102	President	msanderson@sandersonstewart.com
MARK D HOLLE	320 WATERTON WAY BILLINGS, MT 59102	Treasurer	mholle@sandersonstewart.com

Declarations

- I confirm I have reviewed the information set forth in this Annual Report and that all information is correct and factual.
- I have been authorized by the business entity to file this document online.
- I, HEREBY SWEAR AND/OR AFFIRM, under penalty of law, including criminal prosecution, that the facts contained in this document are true. I certify that I am signing this document as the person(s) whose signature is required, or as an agent of the person(s) whose signature is required, who has authorized me to place his/her signature on this document.

Signature

<i>Self</i>	<i>Mark D. Holle</i>	<i>01/04/2024</i>
Signer's Capacity	Sign Here	Date
Position	Other Officer	
Daytime Contact		
Phone Number	(406) 869-3359	
Email	mholle@sandersonstewart.com	



MONTANA SECRETARY OF STATE

January 4, 2024

CERTIFICATION LETTER

I, CHRISTI JACOBSEN, Secretary of State for the State of Montana, do hereby certify that

ENGINEERING, INC.

filed its **2024 ANNUAL REPORT** in this office and has fulfilled the applicable requirements set forth in law. By virtue of the authority vested in this office, I hereby issue this certificate evidencing the filing is effective on the date shown below.

Certified File Number: D034607 - 15937926

Effective Date: January 4, 2024

Thank you for being a valued member of the Montana business community. I wish you continued success in your endeavors.

A handwritten signature in cursive script that reads "Christi Jacobsen".

Christi Jacobsen
Montana Secretary of State



16063373



STATE OF MONTANA
SECRETARY OF STATE
REGISTRATION OF ASSUMED BUSINESS NAME

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STATE OF MONTANA
-FILED-
SECRETARY OF STATE
File Number: 16063373
Date Filed: 2/22/2024 8:46:04 AM

FILING FEE: \$20.00

Filing Fees & Processing Options		
Fees and Processing Options	1 Hour Processing - \$120.00 - Processed within 1 business hour	
Business Name		
Entity name	Sanderson Stewart	
Business Description		
Business Description	Civil Engineering & Surveying	
Applicant		
Applicant Type	Corporation	
Registered Business Entity		
Search for your business entity	ENGINEERING, INC. Domestic Profit Corporation File Number D034607	
Applicant Mailing Address		
Address	MARK D HOLLE 1300 N TRANSTECH WAY BILLINGS, MT 59102	
Declarations		
<input checked="" type="checkbox"/> I understand that the information I enter into the online system is public information and will appear online and on copy requests exactly as I key it into the system.		
<input checked="" type="checkbox"/> I have been authorized by the business entity to file this document online.		
<input checked="" type="checkbox"/> I, HEREBY SWEAR AND/OR AFFIRM, under penalty of law, including criminal prosecution, that the facts contained in this document are true. I certify that I am signing this document as the person(s) whose signature is required, or as an agent of the person(s) whose signature is required, who has authorized me to place his/her signature on this document.		
Signature		
<i>Self</i>	<i>MARK D HOLLE</i>	<i>02/22/2024</i>
Signer's Capacity	Sign Here	Date
Position	Applicant	
Daytime Contact		
Phone Number	(406) 869-3359	
Email	mholle@sandersonstewart.com	

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State of Montana
Business Standards Division
Board of Professional Engineers &
Land Surveyors

PEL-EF-LIC-139

Status: **Active**
Expires: **10/01/2024**

This certificate verifies licensure as:

CERTIFICATE OF AUTHORITY

Person In Charge: RICK LEUTHOLD

Person In Charge: MICHAEL SANDERSON

Person In Charge: DOUGLAS PEZOLDT

ENGINEERING INC DBA SANDERSON STEWART
1300 N TRANSTECH WAY
BILLINGS, MT 59102



Montana Department of
LABOR & INDUSTRY

RENEW OR VERIFY YOUR LICENSE AT:
<https://ebiz.mt.gov/pol>

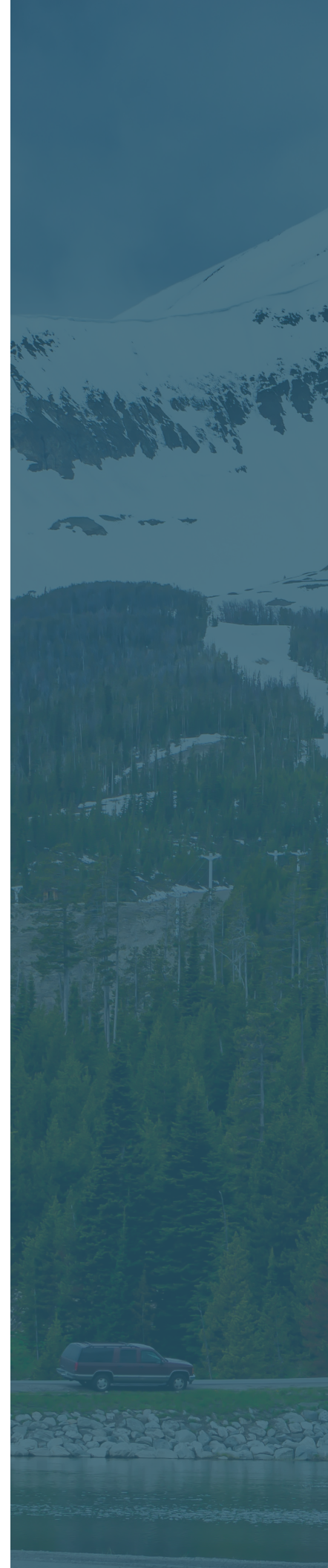
Renew online at <https://ebiz.mt.gov/pol> by signing in with your username and password.

The renewal cycle for your board opens 60 days prior to the expiration date on your current license.

Renew your license prior to your expiration date to avoid being charged a late fee(s).

Remember to maintain your online account information with a password, security question and a valid email address. You can update your account information by accessing the 'Account Management' link when logged in.

4 Appendix



We have included four work samples as an Appendix in the enclosed flash drive, and via email to Daniel Bierschwale.

- Two key deliverables from The Woodlands, TX Incorporation Study
- Gallatin County Economic Conditions Assessment, completed as part of the City of Bozeman's Economic Vitality Strategy
- A Fiscal Impact Analysis for the West Steamboat Springs Neighborhood proposed annexation in Steamboat Springs, CO