

Title	Arts Council of Big Sky Community Art Center	09/04/2024
	by Brian Hurlbut in CIP Phase 2	id. 47405067
	PO Box 160308 Big Sky, Montana 59716 United States 4069952742 brian@bigskyarts.org	

Original Submission 09/04/2024

Score n/a

PROJECT MANAGEMENT

Project Name Arts Council of Big Sky Community Art Center

Who is the primary
internal staff contact
on this project? Brian
Hurlbut

Who is the
secondary internal
staff contact on this
project? Katie
Alvin

What is the weekly
time commitment
towards this project
for these staff
members? 8 hours/week for each staff member

Provide a list of all
key project
stakeholders and key
contributors. Individual Donors
Community Foundations (projected)
Regional/National Foundations (projected)
Resort Tax (projected)

Provide a primary
and secondary
contact for each
external project
stakeholders and key
contributors.

Provide a bulleted list of project milestones.

- Fall 2024: Close on building purchase
- Late Fall 2024: Initial remodel (basic--get ready for office space move)
- Early Winter 2024/25: move ACBS administrative space into new building
- Fall 2025: Begin Phase 1 remodel
- Summer 2026: Open renovated space

If funding was secured what is the anticipated project start date?

11/20/2024

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?

Arts Council of Big Sky

Please explain any public engagement that has taken place for this project.

Meetings with key stakeholders (LMLC, Resort Tax)

Meetings with private donors

Design work session with CCY Architects 9/4-5 (select members of public invited)

Resort Tax CIP Process

LAND/REAL PROPERTY

Is the acquisition of real property required for this project?

Yes

Who owns, or will own the real property for this project?

Arts Council of Big Sky

Has an appraisal been conducted on the property? If so, what was the appraised value vs the purchase price?

No.

PROJECT CONSTRUCTION

What alternatives for the project were considered?	The Arts Council has always had a dream of having its own building for a community arts center. Until this project, our plan was to work with LMLC on the development of a future building that would be dedicated to the arts. We identified a site in the new Town Center area. Realistically, we feel that the completion of a new building would be 7-10 years out and cost upwards of \$20 million (in today's dollars). When we looked into the building proposed for this project, we realized that there is a tremendous opportunity to make something happen much sooner--and revitalize a building that has been vacant for several years. This would give us the space to expand programming, host events and inject vibrancy into the community, while giving us an asset that allows flexibility for our future planning. We have met with LMLC and a future space will still be held for a future arts and cultural presence in the expanded Town Center area.
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Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts?	We don't anticipate having any of these long-term impacts.
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REGULATIONS & PERMITTING

Are there any relevant laws or regulations applicable to the project that we need to be aware of?	At this point we don't think so.
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Do you have any contracts or formal agreements in place related to this project?	Not yet.
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What are the necessary permits and zoning approvals for this project and have they been secured?	We have met with relevant persons and have received informal acknowledgement that there are no permitting/zoning hurdles.
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CAPITAL STACK	Financing of the project
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Please complete the table with project funding sources and detail.

CIP Funding Worksheet.xlsx

Please complete the table with project expenses by category.

CIP Expense Worksheet.xlsx

Who completed the project cost estimate you provided in phase 1 and when what is estimated? Brian Hurlbut completed the phase 1 estimate.

Has your board committed to taking on debt, if so, how much? TBD.

What barriers to accessing finance does this project face?

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid?

ORGANIZATIONAL FINACIAL CAPACITY

Does your organization have the authority (even if not implemented) to issue bonds or to levy mills? No.

Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees?

Are you at maximum capacity for bonds, assessments, mills, and fees?

When was the last time you issued bonds or adjusted your assessments, mills, and fees?

What is the sunset date of your current mills?

Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain

What other revenue streams does your organization have?

Donation income

Sponsorship Income

Program Income (tickets, class registration fees, etc.)

Grant/foundation income

Interest income

Did you provide detail for more than 1 project in the phase 1 questionnaire?

No

Before submitting verify all responses for completion and accurateness.

All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).

ARTS COUNCIL – COMMUNITY ARTS CENTER BUDGET

Funding Source	Amount	Explanation	Date secured or anticipated secure date	Are funds on hand and in bank account? (Y/N)	Next steps to secure funding	Restrictions/contingencies on funding source?	Repayment Required (Y/N)?
Resort Tax	\$ 1,000,000.00			N	CIP		
Private Donations	\$ 7,500,000.00		Mid-2025	N	Donor meetings		N
Grants	\$ 1,500,000.00		End of 2025	N	Applications		N
Total	\$ 10,000,000.00						

Expense Category	Cost
Architecture	\$ 400,000.00
Engineering	\$ 100,000.00
Equipment	\$ 100,000.00
General Contractor	\$ 3,400,000.00
Property Acquisition	\$ 6,000,000.00
Total	\$ 10,000,000.00

Title	Big Sky Community Park Renovation	09/05/2024
	by Whitney Montgomery in CIP Phase 2	id. 47412417
	whitney@bscomt.org	

Original Submission 09/05/2024

Score n/a

PROJECT MANAGEMENT

Project Name	Big Sky Community Park Renovation
Who is the primary internal staff contact on this project?	Whitney Montgomery
Who is the secondary internal staff contact on this project?	Madeleine Feher
What is the weekly time commitment towards this project for these staff members?	15 hours for Whitney Montgomery 10 hours for Madeleine Feher
Provide a list of all key project stakeholders and key contributors.	Big Sky Baseball; Big Sky Futbol Club; Softball League; Pickleball Community; Tennis Community; Big Sky School District; Working Parents in Big Sky;
Provide a primary and secondary contact for each external project stakeholders and key contributors.	Matt Morris: 561-818-6919, matmo35@me.com; John McGuire: 406-589-3002, johnmcguiremt@gmail.com ; Doug Hare: 804-310-5881, director@bigskyfc.org; Heather Morris: 773-972-2149, freddiemo@me.com; Dave Schwalbe: 406-580-4096 dschwalbe@3rivers.net; Mike Scholz: 406-539-1882, mikeinbigsky@gmail.com; Renae Schumacher: 406-581-1357, bsconoco@gmail.com; Krista Traxler (working parent): 406-539-5845, traxler@lonemountainland.com; Mike Scholz: 406-539-1882, mikeinbigsky@gmail.com; Renae Schumacher: 406-581-1357, bsconoco@gmail.com; Dustin Shipman: 406-995-4281, dshipman@bssd72.org

Provide a bulleted list of project milestones.

- Actively support communications strategy within Big Sky for successful vote on public financing of all projects: May 2025
- Secure funding: June 2025
- Execute Contracts for each project within the overall Community Park renovation: July 2025
- Break ground on each project: initiate July 2025 and complete by September 2027
- Acquire materials: less than one month from signing each contract
- Temporarily close affected park areas: at time of initiating each project
- Mobilize Contractors: at time of initiating each project
- Complete each project within overall Community Park renovation: within 24 months of initiating each project
- Safely reopen portions of the Community Park as individual projects are completed: following final inspections for each project
- Grand reopening of entire Community Park: September 2027

If funding was secured what is the anticipated project start date?

7/1/2025

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?

BSCO

Please explain any public engagement that has taken place for this project.

A series of three public engagement workshops were held in Oct. 2022. These workshops utilized an external facilitator that employed group decision making techniques to ensure everyone's voice was heard. Since then, user groups of the Community Park, ie BSFC and Big Sky Baseball, engaged in design of certain aspects of the park projects. Once renderings were created, BSCO hosted three Town Hall gatherings open to the public in February of 2024 to review the Community Park renovation plans and gather community input on specific components on the plan. On August 20, 2024, there was a meeting of the three main user groups of the athletic fields for open dialogue on the plans. The three main user groups now are: Big Sky Futbol Club, Big Sky Baseball, and the Big Sky Softball League. Feedback from all of these public engagement forums led to the final plans.

LAND/REAL PROPERTY

Is the acquisition of real property required for this project?

No

PROJECT CONSTRUCTION

What alternatives for the project were considered?	Reducing the scope of the project has been considered. For example, constructing natural grass fields instead of artificial turf or not renovating Camp Big Sky. Additionally, a phased approach was considered and ultimately utilized for individual projects based on meeting the most need - such as the new playground since the TIGER grant removed the playground in Community Park; or to ensure safety for the users such as was needed for the racket courts which will initiate construction on Sept 9, 2024 and complete in June, 2025.
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Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts?	BSCO anticipates an increase in use of Community Park once all the renovations are completed. The major impact will be parking, and thus increased parking areas are part of this plan. In planning for the new athletic fields being artificial turf, BSCO sought out natural and organic materials to use as infill ensuring no impact to the river. Accessibility also played a major role in the new park design to ensure it meets ADA requirements and the park is up to current codes.
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REGULATIONS & PERMITTING

Are there any relevant laws or regulations applicable to the project that we need to be aware of?	No
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Do you have any contracts or formal agreements in place related to this project?	Ongoing contracts for design and architecture of the Community Park are in place. Contracts for portions of the Community Park renovations have been executed where funding has been secured, ie racket courts and pump track.
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What are the necessary permits and zoning approvals for this project and have they been secured?	Permits will need to be obtained for portions of this renovation like new restrooms. Approvals from BSOA will also be needed and are underway.
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CAPITAL STACK	Financing of the project
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Please complete the table with project funding sources and detail.

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category.

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated?	BSCO worked closed with Jackson Contractors and DHM Design for the majority of the estimates included in this questionnaire. These estimates were obtained in the spring of 2024.
Has your board committed to taking on debt, if so, how much?	The BSCO Board of Directors has agreed to use the Line of Credit (LOC) to cover gaps in pledge fulfillment. The BSCO Board of Directors has decided to not take on long-term debt, however, for construction of these projects.
What barriers to accessing finance does this project face?	BSCO has secured \$6MM in philanthropic support for projects already completed or underway in the Community Park. \$4MM from individuals and businesses, and \$2MM from BSRAD. The main barrier to securing additional funds is not having access to or support from YC members for fundraising or YCCF funding for capital projects, both of which were critical for the construction of BASE. This lack of access and support is due to YCCF's focus on Elevate Big Sky.
What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid?	N/A
ORGANIZATIONAL FINACIAL CAPACITY	
Does your organization have the authority (even if not implemented) to issue bonds or to levy mills?	No
Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees?	N/A
Are you at maximum capacity for bonds, assessments, mills, and fees?	N/A

When was the last time you issued bonds or adjusted your assessments, mills, and fees?	N/A
What is the sunset date of your current mills?	N/A
Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain	N/A
What other revenue streams does your organization have?	In addition to annual unrestricted fundraising, BSCO's annual revenue streams for operations include pass holder fees at BASE, user fees in Community Park and Len Hill Park, BSTRP and BSRAD for maintenance, and community foundations for program support. Capital funding comes from BSRAD, individuals, businesses, and community foundations.
Did you provide detail for more than 1 project in the phase 1 questionnaire?	Yes
PROJECT MANAGEMENT PROJECT 2	
Project Name (2)	New Park for Our Community
Who is the primary internal staff contact on this project? (2)	Whitney Montgomery
Who is the secondary internal staff contact on this project? (2)	Madeleine Feher
What is the weekly time commitment towards this project for these staff members? (2)	10 hours for Whitney Montgomery 2 hours for Madeleine Feher
Provide a list of all key project stakeholders and key contributors. (2)	Lone Mountain Land Company, South Fork Phase 4 HOA, Morningstar Learning Center, Big Sky Futbol Club, Discovery Academy,

Provide a primary and secondary contact for each external project stakeholders and key contributors. (2)

Matt Kid: 617-515-7760, mkidd@crossharborcapital.com, Ken Lancey: 406-570-6930, kennethglancey@gmail.com; Mariel Butan: 561-301-5452, mariel@mlcbigsky.org; Doug Hare: 804-310-5881, director@bigskyfc.org; Heather Morris: 773-972-2149, freddiemo@me.com; Scott Poloff: 406-580-9982, spoloff@bigskydiscoveryacademy.org.

Provide a bulleted list of project milestones. (2)

- Actively support communications strategy within Big Sky for successful vote on public financing of all projects: May 2025
- Secure funding: June 2025
- Execute Contract for construction drawings: July, 2025
- Break ground, August 2025 and complete by September 2026
- Acquire materials: less that one month from signing contract
- Mobilize Contractors: at time of initiating project
- Complete new park by September 2026
- Grand reopening of new park: September 2026

If funding was secured what is the anticipated project start date? (2)

8/1/2025

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed? (2)

BSCO

Please explain any public engagement that has taken place for this project. (2)

A series of three public engagement workshops were held in Oct. 2022. These workshops utilized an external facilitator that employed group decision making techniques to ensure everyone's voice was heard. Key outcomes from this were the desire for more open space, a dog park, and walkability, which are all parts of this new park design. Additionally, BSCO met with the South Fork Phase 4 HOA to discuss the plans and hear their feedback.

LAND/REAL PROPERTY 2

Is the acquisition of real property required for this project? (2)

No

PROJECT CONSTRUCTION | PROJECT 2

What alternatives for the project were considered? (2)

This project is unique in that land was donated for it. The six acres donated for this park is contiguous to land dedicated for a new childcare center, and thus, provides open park space that can be utilized by the community as well as the childcare center. Thus, no alternatives were considered.

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts? (2)

The new park will certainly increase activity in this area. The current renderings of the park show a parking lot with 26 spaces, however, we believe the majority of users in the park will walk or ride bicycles to it. With high density development planned across Ousel Falls Road from the new park, there will need to be safe access to the park from both sides of Ousel Falls Road. The walking paths in the new park will be ADA compliant thus increasing accessibility for all regardless of mobility abilities. The park will be constructed in a manner to save as much of the native plants that exist there now, and there will no light pollution created.

REGULATIONS & PERMITTING | PROJECT 2

Are there any relevant laws or regulations applicable to the project that we need to be aware of? (2)

No

Do you have any contracts or formal agreements in place related to this project? (2)

No formal contracts are in place yet DHM Design has been engaged in planning the park. Once funding is secured, an official contract with DHM will be put in place for construction drawings.

What are the necessary permits and zoning approvals for this project and have they been secured? (2)

BSCO will work closely with TCOA in ensuring the new park meets their standards. Permits will be required for the restrooms.

CAPITAL STACK | PROJECT 2

Financing of the project

Please complete the table with project funding sources and detail. (2)

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category. (2)

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated? (2)

DHM Design in 2023.

Has your board committed to taking on debt, if so, how much? (2)	The BSCO Board of Directors has agreed to use the Line of Credit (LOC) to cover gaps in pledge fulfillment. The BSCO Board of Directors has decided to not take on long-term debt, however, for construction of these projects.
What barriers to accessing finance does this project face? (2)	BSCO has secured \$6MM in philanthropic support for projects already completed or underway in the All Out for Parks and Trails Capital Campaign. \$4MM from individuals and businesses, and \$2MM from BSRAD. The main barrier to securing additional funds is not having access to YC members for fundraising or YCCF funding for capital projects, both of which were critical for the construction of BASE. This lack of access is due to YCCF's focus on Elevate Big Sky.
What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid? (2)	N/A
Did you provide detail for a 3rd project in the phase 1 questionnaire?	Yes
PROJECT MANAGEMENT PROJECT 3	
Project Name (3)	Wilderness Trails, Trailheads, and In-town Paths
Who is the primary internal staff contact on this project? (3)	Whitney Montgomery
Who is the secondary internal staff contact on this project? (3)	Madeleine Feher
What is the weekly time commitment towards this project for these staff members? (3)	Whitney Montgomery: 2 hours per week Madeleine Feher: less than one hour per week
Provide a list of all key project stakeholders and key contributors. (3)	Matt Kidd, LMLC; Bayard Dominick, LMLC, Max Erpenbach, SWMMBA, Pete Costain, Terraflow

Provide a primary and secondary contact for each external project stakeholders and key contributors. (3)

Matt Kid: 617-515-7760, mkidd@crossharborcapital.com; Bayard Dominick: 406-250-2920, bdominick@lonemountainland.com; Max Erpenbach, 406-640-1144, max@southwestmontanamba.org; Pete Costain: 406-261-3943, petecostain@gmail.com;

Provide a bulleted list of project milestones. (3)

- Work with LMLC to determine in-town paths and connections: Initiate June 1, 2025 - ongoing
- Coordinate easements with HOA's and landowners for in-town paths and connections: Initiate Aug 1, 2025 - Ongoing
- Update Master Trails Plan: June 1, 2025 and complete Dec 31, 2025
- Engage private landowners and HOA's for additional trails into the wilderness with trailheads: Jan 8, 2026 - ongoing

If funding was secured what is the anticipated project start date? (3)

6/1/2025

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed? (3)

BSCO

Please explain any public engagement that has taken place for this project. (3)

A series of three public engagement workshops were held in Oct. 2022. These workshops utilized an external facilitator that employed group decision making techniques to ensure everyone's voice was heard. Additional trails and improved in-town connectivity was one of the most requested outcomes from these workshops.

LAND/REAL PROPERTY 3

Is the acquisition of real property required for this project? (3)

No

PROJECT CONSTRUCTION | PROJECT 3

What alternatives for the project were considered? (3)

None

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts? (3)

The anticipated outcome is a reduction of automobile use and congestion in Big Sky. Trails and paths will be built in a way to minimize environmental impact. A portion of the trails and paths will be ADA compliant to improve accessibility.

REGULATIONS & PERMITTING | PROJECT 3

Are there any relevant laws or regulations applicable to the project that we need to be aware of? (3)

No

Do you have any contracts or formal agreements in place related to this project? (3)

No

What are the necessary permits and zoning approvals for this project and have they been secured? (3)

N/A

CAPITAL STACK | PROJECT 3

Financing of the project

Please complete the table with project funding sources and detail. (3)

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category. (3)

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated? (3)

General cost estimates obtained from trail builders and cost per foot of paved paths.

<p>Has your board committed to taking on debt, if so, how much? (3)</p>	<p>The BSCO Board of Directors has agreed to use the Line of Credit (LOC) to cover gaps in pledge fulfillment. The BSCO Board of Directors has decided to not take on long-term debt, however, for construction of these projects.</p>
<p>What barriers to accessing finance does this project face? (3)</p>	<p>BSCO has secured \$6MM in philanthropic support for projects already completed or underway in the All Out for Parks and Trails Capital Campaign. \$4MM from individuals and businesses, and \$2MM from BSRAD. The main barrier to securing additional funds is not having access to YC members for fundraising or YCCF funding for capital projects, both of which were critical for the construction of BASE. This lack of access is due to YCCF's focus on Elevate Big Sky.</p>
<p>What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid? (3)</p>	<p>N/A</p>
<p>Did you provide detail for a 4th project in the phase 1 questionnaire? (3)</p>	<p>No</p>
<p>Before submitting verify all responses for completion and accurateness.</p>	<p>All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).</p>

BSCO – PARKS RENOVATION BUDGET

Funding Source	Amount	Explanation	Date secured or anticipated secure date	Are funds on hand and in bank account? (Y/N)	Next steps to secure funding	Restrictions/contingencies on funding source?	Repayment Required (Y/N)?
Resort Tax	\$ 7,453,428	Bond	June, 2025	N	Bond pass vote	N	N
Private Donations	\$300,000	Part of All Out campaign	pledges received in 2023	N	pledge fulfillment	Community Park	N
Other***	\$1,001,572	BSRAD FY25 grant	June 2024	N	complete projects and request reimbursement	To use for athletic fields, Riverside Recreation Area	N
Total	\$ 8,755,000						

Expense Category	Cost
Architecture	\$ 125,000.00
Engineering	
Equipment	\$ 85,000.00
General Contractor	\$ 8,540,000.00
Total	\$ 8,750,000.00

Title	Cold Smoke	09/03/2024
	by David OConnor in CIP Phase 2	id. 47395049
	david@bigskyhousingtrust.com	

Original Submission 09/03/2024

Score n/a

PROJECT MANAGEMENT

Project Name Cold Smoke

Who is the primary internal staff contact on this project? David O'Connor

Who is the secondary internal staff contact on this project? Becky Brockie

What is the weekly time commitment towards this project for these staff members? 20 hours

Provide a list of all key project stakeholders and key contributors. Big Sky Community Housing Trust

Big Sky Water & Sewer District

Gallatin County Department of Planning & Community Development (Gallatin County Commissioners)

Lone Mountain Land Company

Big Sky Resort Area District

Big Sky Community Organization

Provide a primary and secondary contact for each external project stakeholders and key contributors.	<p>David O'Connor, BSCHT</p> <p>Becky Brockie, BSCHT</p> <p>Johnny O'Connor, BSWSD</p> <p>Brian Wheeler, BSWSD</p> <p>Regan Fruh, GC Planning Dept</p> <p>Cryder Bancroft, LMLC</p> <p>Mike DuCuennois, LMLC</p> <p>Danny Bierschwale, BSRAD</p> <p>Kevin Germain, BSRAD</p> <p>Whitney Montgomery, BSCO</p>
Provide a bulleted list of project milestones.	<ul style="list-style-type: none"> • Big Sky Water & Sewer District Annexation: December, 2024 • Zone Map Amendment: October, 2024 • Development Agreement Signed: Q1 2025 • Resort Tax Bond Vote: May 2025 • Subdivision Approval + Infrastructure Construction Start: Summer 2025 • BSCHT Acquires Land: Summer / Fall 2025 • Vertical Construction Start: 2026 • Initial Occupancy: 2027 (construction + occupancy to be phased)
If funding was secured what is the anticipated project start date?	6/1/2025
What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?	<p>Big Sky Community Housing Trust</p> <p>Individual Homeowners</p> <p>Home Owners Association</p> <p>Property Management Company</p>
Please explain any public engagement that has taken place for this project.	<p>Description of project at LMLC's annual community update, March, 2024</p> <p>Explore Big Sky story, July, 2024</p> <p>Table at Community Week event, October, 2024</p>
LAND/REAL PROPERTY	
Is the acquisition of real property required for this project?	Yes

Who owns, or will own the real property for this project? Big Sky Community Housing Trust
Property Owners
Home Owners Associations

Has an appraisal been conducted on the property? If so, what was the appraised value vs the purchase price? Yes
Appraised Value: \$48 MM + one 9-acre parcel (not yet appraised)
Purchase Price: \$45 MM (including 9-acre parcel)

PROJECT CONSTRUCTION

What alternatives for the project were considered? The Quarry

- Not available to be annexed into BSWSD
- Unable to leverage housing-reserved SFEs
- DEQ water permit issues

North Fork Parcel

- Landowner not yet prepared to sell/develop

Scattered multiple affordable housing projects

- Very limited land availability
- Diminished economy of scale
- Reduced proximity to infrastructure and amenities

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts? Several key stakeholders have been engaged to evaluate and address any potential impacts. We have been actively working with the Big Sky Water & Sewer District to design a water & sewer system that will align with their standards. As part of the subdivision process, we are working with the Gallatin County Department of Planning & Community Development to address all potential impacts to traffic, parking, environment and light pollution etc. - the project will incorporate any required mitigating features. In terms of accessibility, the Big Sky Community Trust is overseeing the entire project and it will be fully accessible to the Big Sky community.

REGULATIONS & PERMITTING

Are there any relevant laws or regulations applicable to the project that we need to be aware of?

- ADA
- Fair Housing
- Deed Restrictions
- Development/Land Use Regulation

Do you have any contracts or formal agreements in place related to this project?	Letter of Intent for Deed Restriction Stewardship (Executed) Formal Stewardship Agreement (In Process) Letter of Intent for Land Acquisition (In Process) Formal Purchase and Sale Agreement to Acquire Land (In Process)
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What are the necessary permits and zoning approvals for this project and have they been secured?	BSWSD Annexation - in process, expected by December 2024 Zone Map Amendment - in process, expected by October 2024 Subdivision Approval / Land Use Permit - in process, expected by Summer 2025
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CAPITAL STACK	Financing of the project
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Please complete the table with project funding sources and detail.

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category.

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated?	David O'Connor - \$60 MM, which was Land Acquisition + Infrastructure
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Has your board committed to taking on debt, if so, how much?	TBD
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What barriers to accessing finance does this project face?	Interest rates, debt service coverage ratio (for rental product), potential need for guarantors
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What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid?	Debts will be secured by project real estate as collateral
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ORGANIZATIONAL
FINACIAL CAPACITY

Does your organization have the authority (even if not implemented) to issue bonds or to levy mills?	No
Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees?	N/A
Are you at maximum capacity for bonds, assessments, mills, and fees?	N/A
When was the last time you issued bonds or adjusted your assessments, mills, and fees?	N/A
What is the sunset date of your current mills?	N/A
Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain	N/A
What other revenue streams does your organization have?	Unit Sales (project specific) Philanthropy Program Fees
Did you provide detail for more than 1 project in the phase 1 questionnaire?	No
Before submitting verify all responses for completion and accurateness.	All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).

COLD SMOKE BUDGET

FUNDING Source	Amount	Explanation	Date secured or anticipated secure date	Are funds on hand and in bank account? (Y/N)	Next steps to secure funding	Restrictions/contingencies on funding source?	Repayment Required (Y/N)?
Resort Tax	\$ 60,000,000	Land acquisition + project infrastructure	Summer 2025	N	RT bond vote	Project specific funding, BSRAD statute	N
Loans/Bank Financing	\$ 160,000,000	Construction financing - potential for low-interest loans	2026	N	Discussions with local lenders		Y
Other***							
Total	\$ 220,000,000						

Expense Category	Cost
Architecture	\$ 3,030,303
Engineering	\$ 1,136,364
Equipment	
General Contractor	\$ 151,515,152
Other Contract Services	\$ 2,659,091
Insurance (Liability, D&O, Vehicle, Umbrella, etc)	
Loan/Interest Payment	
Marketing, Advertising, and Communications	
Materials and Supplies	
Payroll and Benefits	
Permitting and Licensing Fees	\$ 750,000
Property Acquisition	\$ 45,000,000
Rent and Mortgage	
Repairs and Maintenance	
Travel & Training	
Contingency	\$ 15,909,090
Other	
Total	\$ 220,000,000

Title	Transit Bus Stop Pull-outs and Waiting Facilities	09/05/2024
	by Darren Brugmann in CIP Phase 2	id. 47411447
	dbrugmann@bigskytd.com	

Original Submission 09/05/2024

Score n/a

PROJECT MANAGEMENT

Project Name Transit Bus Stop Pull-outs and Waiting Facilities

Who is the primary internal staff contact on this project? Darren Brugmann

Who is the secondary internal staff contact on this project? David Kack

What is the weekly time commitment towards this project for these staff members? 20+ hours at onset and increased as project is under construction.

Provide a list of all key project stakeholders and key contributors.

- Gallatin County Commission
- Madison County Commission
- Montana Department of Transportation (MDT)
- Federal Transit Administration (FTA)
- Lone Mountain Land Company
- Big Sky Resort
- HRDC (Streamline)
- Big Sky Sustainability Network Organization
- Coordinating Council of Big Sky

Provide a primary and secondary contact for each external project stakeholders and key contributors.

Ennion Williams - ennion@theoutlawpartners.com
Bayard Dominick - bdominick@lonemountainland.com
Construction firm to be determined.

Provide a bulleted list of project milestones.

Federal Grant Application: February 2025
Grant Award: June 2025
Contractor RFP Process: June 2025 - December 2025
Agreement/Contract Negotiation: January 2026 - April 2026
Construction Start: May 2026
Construction End: November 2026

If funding was secured what is the anticipated project start date?

5/4/2026

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?

Big Sky Transportation District

Please explain any public engagement that has taken place for this project.

BSTD has implemented a 5 Year Strategic Plan in spring of 2024. In order to gauge community input, a survey was conducted. Having safe and comfortable main stops was a common theme expressed.

Skyline Community Survey Results

A community survey was developed with the goal of learning how existing riders use the Skyline system,

what types of improvements those riders would like to see, what types of service improvements or changes

would be most valuable, and what types of barriers prevent non-riders from using the system. The

Community Survey was developed for the Skyline Transit Service to ensure that this Plan would address

the needs of the community.

The survey was available for over 4 weeks from March 2nd to April 3rd 2023. During that time, 1,850

individuals completed the survey. Over 35% of respondents reported that they ride the Skyline service at

least once a week. Over 15% of respondents reported that they have never used the Skyline service.

Of the Skyline riders roughly a quarter said they used Skyline because they wanted to avoid parking at

work. Other top reasons to ride were affordability and/or for the environment/community.

The survey also asked the respondents to list their desired improvements. The top responses were shorter headways, later service hours, and **better stops**.

LAND/REAL PROPERTY

Is the acquisition of real property required for this project? No

PROJECT CONSTRUCTION

What alternatives for the project were considered? No other alternatives were considered.

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts?

The long term impacts of these projects are addressing the exact areas mentioned: decreasing traffic, parking and environmental impacts.

By pursuing transit investments in Big Sky and elsewhere within BSTD's service area, this suite of improvements will encourage

regional goals of decreasing reliance on private cars, thereby reducing environmental impacts and improving safety outcomes.

Furthermore, as Gallatin County continues to grow, these facilities will connect to a new Urban Transportation District

serving Bozeman, Montana, and its surroundings.

Smart Land Use

The project will spur redevelopment interest in greenfield sites where the improved bus stops are to be

located. Local partners such as the Lone Mountain Land Company have already committed to leveraging this

opportunity through the construction of over 3,000 employee beds throughout the BSTD service area, with

over 1,000 beds within a half-mile walking distance from the proposed facility in Gallatin Gateway. Ensuring

close proximity of employee housing to stops not only increases the utilization of transit service by providing

one central hub for riders to access the wider system, it eliminates or reduces less sustainable commuter trips

between transit and home. With transit access closer to home, employees will also choose to make non-commuting trips across the region via transit. These choices will be further supported by future development

around the stops, as BSTD expects to see increased retail and service developments in response to the

facilities investments, further reducing the need to travel longer distances for most types of trips. As a result,

BSTD is not only anticipating increased ridership through this land use and transportation connection, but

also decreases in overall regional VMT, emissions, and crashes.

Are there any relevant laws or regulations applicable to the project that we need to be aware of? none known at this time. Federal Grant awards will have standard certifications and assurances required but we will not know for certain until awards are announced and agreements executed.

Do you have any contracts or formal agreements in place related to this project? None at this time.

What are the necessary permits and zoning approvals for this project and have they been secured? None at this time.

CAPITAL STACK Financing of the project

Please complete the table with project funding sources and detail.

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category.

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated? February 2023: The cost estimates for the project were developed by a local engineering firm with experience costing and designing similar infrastructure in the area.
The new edited figure has been provided by same firm in September 2024.
The figure above has been inserted into the General Contractor line item. A more detailed Engineer's Rough Order of Magnitude Cost Estimate is available per request. It was too difficult to delineate the costs with the line items given as choices above.

Has your board committed to taking on debt, if so, how much? BSTD has accumulated a reserve balance account to be utilized, by Board action, for such purposes.

What barriers to accessing finance does this project face? Federal Grants are competitive and awarded by MDT from Federal Transit Administration. Grant cycle is in Spring of each year. Each funding cycle awards different amounts depending on what has been appropriated from Federal Budgets. No award is guaranteed and not know until each application cycle is carried forward.

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid?

BSTD has accumulated a reserve balance account to be utilized, by Board action, for such purposes. Timing of reimbursement payments may be a challenge with any Federal Grant award.

ORGANIZATIONAL FINACIAL CAPACITY

Does your organization have the authority (even if not implemented) to issue bonds or to levy mills?

Yes. TITLE 7. LOCAL GOVERNMENT, CHAPTER 14. TRANSPORTATION Part 2. Urban Transportation Districts

Purpose

7-14-201. Purpose. This part authorizes the establishment of urban transportation districts to supply transportation services and facilities to district residents and other persons.

Mill Levy Authorized

7-14-232. Mill levy authorized. Subject to 15-10-420, the commissioners shall annually, at the time of levying county taxes, fix and levy a tax in mills upon all property within the transportation district sufficient to operate the district, taking into account the amount requested by the board.

Transportation District Bonds Authorized

7-14-235. Transportation district bonds authorized. A transportation district may borrow money by the issuance of general obligation or revenue bonds or a combination thereof to provide funds for the district.

BSTD is in process of engaging a legal representative in order to pursue a Mill Levy. The Board will take action on this at their September 18, 2024 General Board Meeting. Among other areas, our legal consult will assist in determining the rate of the mill to be pursued.

Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees?

BSTD is in process of engaging a legal representative in order to pursue a Mill Levy. The Board will take action on this at their September 18, 2024 General Board Meeting.

Among other areas, our legal consult will assist in determining the statutory limits on how much can be levied for bonds and/or assessments of mills and the rate of the mill to be pursued.

Are you at maximum capacity for bonds, assessments, mills, and fees?

No bonds, assessments, mills and/or fees are in place at this time.

BSTD is in process of engaging a legal representative in order to pursue a Mill Levy. The Board will take action on this at their September 18, 2024 General Board Meeting.

Among other areas, our legal consult will assist in determining the statutory limits on how much can be levied for bonds and/or assessments of mills and the rate of the mill to be pursued.

When was the last time you issued bonds or adjusted your assessments, mills, and fees?	None. The only fees the District currently levies are a Transit Fare for service to/from Bozeman on the LINK commuter routes. The Board has complete discretion at any fees/charges levied to passengers using the service. The Board recently increased the cost of purchasing bus passes at their June 2024 General Board Meeting.
What is the sunset date of your current mills?	N/A
Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain	Yes. The District does plan to go to property owners in the District in order to ask for a mill levy to assist with the funding of the operation of the district. BSTD is in process of engaging a legal representative in order to pursue a Mill Levy. The Board will take action on this at their September 18, 2024 General Board Meeting.
What other revenue streams does your organization have?	Federal Grant awards, Bus Fares and Passes and local contributions from Gallatin and Madison counties.
Did you provide detail for more than 1 project in the phase 1 questionnaire?	No
Before submitting verify all responses for completion and accurateness.	All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).

BSTD – BUS PULL-OUTS AND WAITING AREAS

Source	Amount	Explanation	Date secured or anticipated secure date	Are funds on hand and in bank account? (Y/N)	Next steps to secure funding	Restrictions/contingencies on funding source?	Repayment Required (Y/N)?
Resort Tax	\$5,882,031	MT64 @ Huntley & Riverview & Aspen Drive		N	FTA Applications	Other funding sources will continue to determine amount	N
Mills		In Process	2027				
Corporate Donations & Sponsorships		In process/bus passes					
Grants		In Process	45809				
Reserves		TBD		Y			
Total	\$5,882,031						

Expense Category	Cost
General Contractor	\$ 5,882,031.00
Total	\$ 5,882,031.00

Title	Canyon Sewer Project	09/04/2024
	by Mace Mangold in CIP Phase 2	id. 47400061
	mmangold@wgmgroup.com	

Original Submission 09/04/2024

Score n/a

PROJECT MANAGEMENT

Project Name Canyon Sewer Project

Who is the primary internal staff contact on this project? Mace Mangold

Who is the secondary internal staff contact on this project? Scott Altman

What is the weekly time commitment towards this project for these staff members? Mace (10-20 hours), Scott (1-5 hours)

Provide a list of all key project stakeholders and key contributors. Gallatin Canyon County Water & Sewer District, Big Sky County Water & Sewer District, Big Sky Resort Area District, annexed landowners, Gallatin River Task Force. Potentially Gallatin County (funding and TEDD).

Provide a primary and secondary contact for each external project stakeholders and key contributors. BSCWSD - Johnny O'Conner (785.639.5564, Johnny@wsd363.com), Al Malinowski (406.539.2351, al_mal@yahoo.com)
BSRAD - Kevin Germain (406.580.6986, kevin@resorttax.org), Danny Bierschwale (406.224.0508, daniel@resorttax.org)
GRTF - Kristin Gardner (406.539.2350, kristin@gallatinrivertaskforce.org)

Provide a bulleted list of project milestones.

- 03/25, 60% Design
- 08/25, Contractor Procurement
- 01/26, Discharge Permit
- 03/26, Construction Drawings
- 07/26, Construction Start

If funding was secured what is the anticipated project start date?	7/1/2026
What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?	GCCWSD and/or BSCWSD
Please explain any public engagement that has taken place for this project.	Multiple public outreach meetings, website, Big Sky community event presentations, landowner flyers for annexation, multiple Explore Big Sky articles
LAND/REAL PROPERTY	
Is the acquisition of real property required for this project?	Yes
Who owns, or will own the real property for this project?	Easements are being coordinated with relevant landowners. Key easement coordination includes Mike Kallestad and Renae Schumacher.
Has an appraisal been conducted on the property? If so, what was the appraised value vs the purchase price?	No.
PROJECT CONSTRUCTION	
What alternatives for the project were considered?	"Co-solution" that includes BSCWSD treatment and GCCWSD providing supplemental disposal. "Go it Alone" solution would involve construction of a dedicated Canyon Area Water Reclamation and Reuse Facility (WRRF). Both alternatives are of similar cost scale. "Co-Solution" will continue to advance based on community objective to be able to optimize wastewater treatment and reuse community wide.

<p>Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts?</p>	<p>Increased development is anticipated to be generated as a result of the project. This will increase traffic but is not anticipated to have significant other impacts (parking, environmental, water use, light pollution nor accessibility). The proposed roundabout at the 64/191 intersection is anticipated to largely mitigate traffic impacts. The project will provide reduced nutrient loading to the Gallatin River and improved human health protection by reducing the number of septic systems.</p>
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REGULATIONS & PERMITTING

<p>Are there any relevant laws or regulations applicable to the project that we need to be aware of?</p>	<p>Montana DEQ approvals including a Groundwater Discharge Permit and review of infrastructure design drawings. Coordination and approvals are also required with MDT and USFS.</p>
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<p>Do you have any contracts or formal agreements in place related to this project?</p>	<p>Operational and Interlocal agreements with BSRAD. Consultant services include contracts with the below entities:</p> <p>Engineering - WGM Group and subconsultants</p> <p>Legal - Tara Depuy</p> <p>Accounting - Knaub & Company</p> <p>Grant Audit - Holmes & Turner</p>
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<p>What are the necessary permits and zoning approvals for this project and have they been secured?</p>	<p>Montana DEQ Groundwater Discharge Permit</p> <p>MDT Right-of-Way access/encroachment permit</p> <p>Gallatin County Land Use Permit or Conditional Use permit (potentially required for lift stations)</p> <p>No permits have been secured.</p>
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<p>CAPITAL STACK</p>	<p>Financing of the project</p>
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Please complete the table with project funding sources and detail.

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category.

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated?

Has your board committed to taking on debt, if so, how much?

No

What barriers to accessing finance does this project face?

Project implementation is heavily reliant on BSRAD and/or Gallatin County funding avenues. Specifically, BSCWSD is anticipated to require that the full cost for the Highway 64 infrastructure to be covered by non-BSCWSD funds (BSRAD, Gallatin County, other grants/loans). The original estimate of \$12M is now \$20M(+/-). Highway 191 infrastructure is predominately anticipated to be funded via a low interest SRF Loan with an additional objective of debt repayment via TIF revenue facilitated through TEDD mechanism.

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid?

TBD

ORGANIZATIONAL FINACIAL CAPACITY

Does your organization have the authority (even if not implemented) to issue bonds or to levy mills?

County Utility District's have the ability (Gallatin County/voters have authority)

Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees?

Yes. Bonding capacity and mills are capped based on Montana Code Annotated.

Are you at maximum capacity for bonds, assessments, mills, and fees?

No.

When was the last time you issued bonds or adjusted your assessments, mills, and fees?	Never
What is the sunset date of your current mills?	NA
Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain	Yes
What other revenue streams does your organization have?	Connection fees and user rates. Connection fees have the potential to serve as up front capital commitments and/or be captured as debt repayment to be incorporated into the monthly user rate. The user rate is typically reserved to cover annual operation and maintenance (O&M) cost.
Did you provide detail for more than 1 project in the phase 1 questionnaire?	No
Before submitting verify all responses for completion and accurateness.	All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).

CANYON BUDGET

Funding Source	Amount	Explanation	Date secured or anticipated secure date	Are funds on hand and in bank account? (Y/N)	Next steps to secure funding	Restrictions/contigencies on funding source?	Repayment Required (Y/N)?
Resort Tax	\$ 12,000,000	BSCWSD-BSRAD Interlocal Agreement	2020	N	BSRAD-BSCWSD-GCCWSD coordination	1% Resort Tax stipulations	N
Fees (Property Tax)				N	Gallatin County TEDD coordination	TBD	N
Bonds (Property Tax)	\$ 10,000,000	Anticipating combination Special Assessment and TIF based bond(s)	2025	N	Gallatin County coordination	TBD	N
Private Donations	\$ 1,000,000	"nutrient credit" facilitated via GRTF	2026		GRTF collaboration	TBD	
Corporate Donations & Sponsorships	\$ 1,000,000	"nutrient credit" facilitated via GRTF	2026		GRTF collaboration		
Grants	\$ 3,825,000		2022-2023	N	Draw request and start-up requirements	Maintain sufficient "match" dollars	N
Loans/Bank Financing	\$ 24,005,000	SRF Loan, Resort Tax and/or Private	2025	N	State Revolving Fund coordination	TBD	Y
Other***	\$ 3,000,000	additional grants	2026	N			N
Total	\$ 54,830,000						

Expense Category	Cost
Architecture	\$ 50,000
Engineering	\$ 4,810,000
Equipment	
General Contractor	\$ 4,000,000
Materials and Supplies	\$ 31,000,000
Property Acquisition	\$ 620,000
Contingency	\$ 7,500,000
Other	\$ 6,850,000
Total	\$ 54,830,000

Title	Big Sky Wildlife Overpass and Bridge Retrofit Project	09/04/2024
	by Deborah Davidson in CIP Phase 2	id. 47400695
	PO Box 1587 Bozeman, Montana 59771 United States 406-586-8082 deb@largelandscapes.org	

Original Submission 09/04/2024

Score n/a

PROJECT MANAGEMENT

Project Name Big Sky Wildlife Overpass and Bridge Retrofit Project

Who is the primary internal staff contact on this project? Deb Davidson

Who is the secondary internal staff contact on this project? Abigail Breuer

What is the weekly time commitment towards this project for these staff members? At present, Deb and Abigail spend a minimum of 40 hours per work on advancing wildlife crossings along US-191. Please note CLLC staff members Liz Fairbank (road ecologist), Kylie Paul (road ecologist) and Michael Wainright (CLLC's new individual giving manager) are also critical to this effort for Liz and Kylie's work on state-level wildlife crossing issues, and Michael's work to help raise the required non-federal match.

Provide a list of all key project stakeholders and key contributors. Stakeholders: Montana Department of Transportation, Montana, Fish, Wildlife and Parks, US Forest Service, Gallatin County
Key Contributors: Montana State University's Western Transportation Institute, BSRAD
Financial supporters: BSRAD, Yellowstone Club Community Foundation, Moonlight Foundation, Turner Foundation, Weeden Foundation, Volgenau Foundation

Provide a primary and secondary contact for each external project stakeholders and key contributors.

Montana Department of Transportation: Dwane Kailey, Chief Operating Officer, dkailey@mt.gov, 406-444-9205; Patrick Cross, Butte District Biologist, pacross@mt.gov 406-444-9205. Montana Fish, Wildlife & Parks: Deb Wambach, Wildlife Coordination Bureau Chief, deb.wambach@mt.gov, 406-444-5672; Julie Cunningham, Area Biologist, juliecunningham@mt.gov. USFS: Kathryn Barker, Recreation Program Manager, kathryn.barker@usda.gov, 406-522-2536; Corey Lewellen, District Ranger, corey.lewellin@usda.gov 406-522-3531. Gallatin County: Jennifer Boyer, County Commissioner, Jennifer.Boyer@gallatin.mt.gov, 406-582-3000; Sean O'Callaghan, Chief Planning Officer, sean.ocallaghan@gallatin.mt.gov, [406-582-3130](tel:406-582-3130). MSU's Western Transportation Institute: Marcel Huijser, Research Scientist, mhuijser@montana.edu, 406-543-2377; Kelvin Wang, Director, kelvin.wang@montana.edu, 406-994-7527.

Provide a bulleted list of project milestones. Please note the project timeline will depend on which of several federal potential transportation funding programs the Montana Department of Transportation, in consultation with CLLC and Jacobs, a global engineering firm with expertise in wildlife crossings, selects for application for greatest likelihood of success. This determination will be based in part upon the ongoing engineering feasibility study.

Federal notices are posted four months in advance of deadlines, which may vary in any given year. The schedule below is based on a project application submitted in Summer 2025 and awarded in fall/winter of the same year.

Initial Activities

First milestone: Pledges for required 13.42% non-federal match raised. No money needs to change hands until a grant is awarded; having committed pledges is key to submission of a competitive proposal.

Grant Proposal Submitted: Summer 2025

Grant Awarded: Winter 2025-2026

Grant Agreement Signed: Summer 2026

Permitting/Approvals (Jul 2026-Dec 2027)

Project Environmental Surveys: Jul-Sep 2026

NEPA: Jul-Dec 2026

Right of Way Appraisals and Acquisitions: Apr-Dec 2027

Engineering Phase (Nov 2026-Mar 2028)

80% Design, Cost Estimate, Risk Workshop: Jan-Mar 2027

90% Design, Cost Estimate, and Project Permitting: Apr-Sep 2027

100% Design: Oct-Dec 2027

Construction Phase (Apr 2028-Sep 2029)

Construction Begins: Apr 2028-Sep 2028

Substantial Completion: Jun 2029-Aug2029

Final Completion: Aug 2029-Sep 2029

If funding was secured what is the anticipated project start date?

7/15/2026

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?

Montana Department of Transportation (MDT) is the responsible party for all aspects of this project, including proposal submission, design and engineering, and permitting, along with keeping the structures and associated attributes, especially fencing, in good repair.

CLLC is described as an eligible partner in MDT's submission to the federal Wildlife Crossings Pilot Program for a related project near Gallatin Gateway. We have written the proposal and raised the bulk of the non-federal match.

Please explain any public engagement that has taken place for this project.

As part of CLLC's work on the US-191/MT-64 Wildlife & Transportation Assessment that helped to identify the proposed project, the organization has conducted outreach in the communities of Bozeman, Gallatin Gateway, Big Sky and West Yellowstone, MT. Activities include a series of community information sessions, updates to organizations like the West Yellowstone Chamber of Commerce, articles in the area newspapers and magazines such as the Bozeman Daily Chronicle, Explore Big Sky, Montana Free Press, and Outside Bozeman, along with social media posts and segments on public radio. CLLC has used a variety of avenues to communicate with the public about road ecology, including a billboard now posted along US-191, just north of Gallatin Gateway, donated by the Big Sky Chamber of Commerce and co-branded with the Big Sky Resort Area District. Further, the group has hosted a booth at the Big Sky Farmer's Market and engaged with students at Lone Peak High School. CLLC also hosts a [citizen science website](#) and an e-mail list of nearly 200 subscribers.

The Key Findings and full report of the US-191/MT-64 Wildlife & Transportation Assessment, including a video of the Big Sky Community Information Session, are available on a [project-specific website](#).

LAND/REAL PROPERTY

Is the acquisition of real property required for this project?

Yes

Who owns, or will own the real property for this project?

GVLT has already acquired a parcel that is essential for the project within the Dudley Creek HOA at its northern end. Purchase of a second parcel, adjacent to the parcel GVLT purchased, would be helpful to the project in terms of ensuring open space and lack of disturbance for wildlife taking advantage of the proposed wildlife crossing structure. Securing this parcel may be a requirement of the Montana Department of Transportation to move forward.

In the long run, these parcel(s) would be donated to the U.S. Forest Service, which owns the surrounding land. The crossing structures and associated fencing would be located within the Montana Department of Transportation's right-of-way along US-191.

Has an appraisal been conducted on the property? If so, what was the appraised value vs the purchase price?

The expected fair market value is \$800,000 based on area sales.

PROJECT CONSTRUCTION

What alternatives for the project were considered?

Wildlife accommodation measures fall into two overarching categories: a) measures aimed at influencing driver behavior and b) measures to make roads more permeable to wildlife. While some measures to influence driver behavior may reduce the risk of wildlife-vehicle collisions, with varying degrees of success, this category of measures generally fails to address the barrier effect of roads on wildlife movement, a key concern along US-191 due to high traffic volume. Only the latter category, in which wildlife is separated from traffic by fencing and crossing structures designed to enable safe animal passage, achieves the dual objectives of reducing wildlife-vehicle collisions and maintaining habitat connectivity. While initial construction costs are high for any road infrastructure project, properly-sited and designed wildlife crossing structures commonly reduce wildlife-vehicle collisions by 85% or more and often pay for themselves ahead of their 75-year lifespan based on the cost savings due to reduced property damage and human injury.

Side by side studies of wildlife overpasses vs. underpasses show that the primary species of concern in the area--elk, bighorn sheep, and grizzly bear family groups--highly prefer overpasses. Further, an underpass with sufficient vertical clearance for elk would not be possible in the location without raising the roadbed significantly (i.e. building the road up on berms), causing issues for driveways, access roads, and drainage. While lowered speed limits are often suggested as a measure to reduce wildlife-vehicle collisions, studies in Wyoming and Colorado have found no effect even with increased enforcement, as drivers persist in driving the speed at which they are comfortable, considered the "operating speed" of a road. The nighttime operating speed would need to be as low as 25-30 miles/hr to allow sufficient stopping time for most drivers to avoid wildlife. Depending on topography and other road conditions, variable messaging signs can be effective short-term, provided drivers heed their warnings and have sufficient room to stop. However, they quickly lose effect as drivers become habituated to their location and message. A detailed overview of the efficacy of wildlife accommodation measures based on peer-reviewed research is included in the [US-191/MT-64 Wildlife & Transportation Assessment](#) on pages 42-45, and a table summarizes this information in the [Key Findings](#).

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts?

No.

The project might increase access to the areas beneath the Jack Smith and West Fork bridges, which is not a goal in terms of safe wildlife passage. Further, the parking area on the south side of the Jack Smith bridge would likely be improved in coordination with the Gallatin River Task Force (GRTF and US Forest Service, which has already identified this as for remediation in GRTF's Gallatin River Restoration Strategy.

REGULATIONS & PERMITTING

Are there any relevant laws or regulations applicable to the project that we need to be aware of?

Montana Department of Transportation projects are highly regulated and proceed under guidelines determined by the Federal Highway Administration. A host of laws and regulations govern each step of the project. The ongoing draft feasibility study that will be completed by year-end has identified no potential red flags that could derail the project.

Do you have any contracts or formal agreements in place related to this project?

No.

What are the necessary permits and zoning approvals for this project and have they been secured?

In the permitting phase following a federal transportation grant award, the project would undergo a planning environmental review to comply with all applicable federal, state, and local rules and regulations, and to analyze potential impacts on resources to determine appropriate prevention measures and necessary permits. Environmental approvals that may be required include:

NEPA (Categorical Exclusion possible)

U.S. Army Corps of Engineers – Section 404 of the Clean Water Act and Section 10 of the Rivers and Harbors Act Permit

Montana Department of Environmental Quality Section 401 Water Quality Certification

USFWS Section 7 Consultation (informal)

Montana Department of Environmental Quality – 318 Authorization for temporary turbidity

Montana Stream Protection Act (SPA 124) Permit

Montana Department of Natural Resources and Conservation – Navigable Rivers Land Use License, Lease, or Easement

Montana Department of Environmental Quality – General Permit for Stormwater Discharges Associated with Construction Activity

Gallatin County Floodplain Development permit

CAPITAL STACK Financing of the project

Please complete the table with project funding sources and detail.

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category.

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated?

The estimate is based upon the Montana Department of Transportation's Project Budget Worksheet for standalone wildlife accommodations projects, completed by CLLC in Spring 2024. Please note the ongoing engineering feasibility study should provide a more robust estimate.

The costs are for the construction of a Wildlife Overpass and Bridge Retrofits (addition of a secure pathway beneath for small to medium-bodied wildlife) of both the Jack Smith and West Fork bridges. Also included are: a) associated wildlife exclusionary fencing connecting the wildlife overpass to the bridges along both sides of the road, b) jump-outs (escapes) for any animals that do enter the fenced corridor, and c) double cattle guards at each access or driveway within the anticipated fenced area. Please note: fencing is integral to the success of wildlife crossings, which exclude wildlife from a roadway while enabling suitable, safe passage.

Engineering/Project Development Costs: \$4,128,085

Feasibility- \$500,000

Design- \$2,176,851

Construction Engineering (inspection)- \$1,451,234

Construction Materials: \$7,370,000

Wildlife Overpass- \$6,000,000

Bridge Retrofits- \$320,000

Double Cattle Guards (6)- \$450,000

Fencing (both sides of road, about 1.5 miles)- \$480,000

Jumpouts (8)- \$120,000

Equipment and Mobilization: \$1,474,000

Contingency: \$3,095,400

Other: \$2,572,941

Inflation: \$1,193,940

Indirect Costs: \$1,379,001

Land Acquisition: \$800,000

Has your board committed to taking on debt, if so, how much?

No.

What barriers to accessing finance does this project face?

1. Federal transportation grant programs such as the Wildlife Crossings Pilot Program, Federal Lands Access Program, Rebuilding American Infrastructure with Equity and Sustainability and Nationally Significant Federal Lands and Tribal Projects Program, each of which is a potential funding source for wildlife crossings in the vicinity of Big Sky require an up to 20% non-federal match. While organizations including CLLC are working on policy to develop state funds to help achieve this match, at present the primary option for the non-federal match is through philanthropic or other local sources. As infrastructure projects are capital intensive, even the comparatively small 13.42% of match for which the Montana Department of Transportation usually qualifies is a significant sum. Based on the existing cost estimate of \$19,440,426 for this project, the required non-federal match is: \$2,608,905.

2. Each of the federal transportation grant programs is highly competitive. Access to pledge funds for the full match is just one criterion that determines project readiness. Quite possibly, the project will need to be proposed more than one time, the application for each of which is a significant lift, in order to succeed.

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid?

N/A.

ORGANIZATIONAL FINANCIAL CAPACITY

Does your organization have the authority (even if not implemented) to issue bonds or to levy mills?

No.

Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees?

N/A.

Are you at maximum capacity for bonds, assessments, mills, and fees?

N/A.

When was the last time you issued bonds or adjusted your assessments, mills, and fees?	N/A.
What is the sunset date of your current mills?	N/A.
Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain	N/A.
What other revenue streams does your organization have?	CLLC derives 48% of its revenue from foundations, 24% from individual donors, 13% from universities, partners or corporations, 6% as fee for service, 4% from multi- or bi-laterals, and 3% from government or tribes.
Did you provide detail for more than 1 project in the phase 1 questionnaire?	No
Before submitting verify all responses for completion and accurateness.	All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).

CLLC WILDLIFE BRIDGE BUDGET

Funding Source	Amount	Explanation	Date secured or anticipated secure date	Are funds on hand and in bank account? (Y/N)	Next steps to secure funding	Restrictions/contingencies on funding source?	Repayment Required (Y/N)?
Resort Tax		part of 13.42% non-federal match	Summer 2025	No			
Private Donations		part of 13.42% non-federal match	Summer 2025	No.	CLLC has initiated an ambitious fundraising campaign for this site, along with the Gallatin Gateway project area and intends to continue to raise funds over the coming year. We have a prospect list of over 40 potential donors and will begin to amplify the campaign as soon as Fall 2024. In addition, GVLTA anticipates participating in fundraising for this site.		
Corporate Donations & Sponsorships		part of 13.42% non-federal match	Summer 2025	No.	CLLC has initiated an ambitious fundraising campaign for this site, along with the Gallatin Gateway project area and intends to continue to raise funds over the coming year.		
Grants		86.58% federal match	Winter 2025-2026	No.	through application to Federal Highway Administration grant programs		
Total	\$ -						

Expense Category	Cost
Engineering	\$ 4,128,085.00
General Contractor	\$ 1,474,000.00
Materials and Supplies	\$ 7,370,000.00
Property Acquisition	\$ 800,000.00
Contingency	\$ 3,095,400.00
Other	\$ 2,572,941.00
Total	\$ 19,440,426.00

Title	Gallatin River Restoration - Bozeman District Parking Areas	09/05/2024
	by Gallatin River Task Force in CIP Phase 2	id. 47416246
	PO Box 160513 Big Sky, Montana 59716 MT United States 406-993-2519 kristin@gallatinrivertaskforce.org	

Original Submission 09/05/2024

Score n/a

PROJECT MANAGEMENT

Project Name Gallatin River Restoration - Bozeman District Parking Areas

Who is the primary
internal staff contact
on this project? Emily
O'Connor

Who is the
secondary internal
staff contact on this
project? Kristin
Gardner

What is the weekly
time commitment
towards this project
for these staff
members? 5-10 hours per week.

Provide a list of all
key project
stakeholders and key
contributors. Project Partner: Custer-Gallatin National Forest

Key Stakeholders: outfitters & guides, recreation/tourism, state and local
agencies, environmental non-profit organizations

Provide a primary and secondary contact for each external project stakeholders and key contributors.

Primary Partner Contact: Kathryn Barker, Bozeman District Recreation Manager

Secondary Partner Contact: Wendi Urie, Hebgen District Ranger

Stakeholders: Montana Whitewater, Wave Train Kayak, Gallatin River Guides, East Slope Outdoors, Jakes Horses, Canyon Adventures, Big Sky Community Organization, Visit Big Sky, MT DEQ, MT Fish, Wildlife and Parks, American Rivers, Trout Unlimited, Gallatin Watershed Council, Grow Wild.

Provide a bulleted list of project milestones.

- Conceptual - 30% design (Complete, July 2022 - June 2023)
- 60-90% Design (Complete, July 2023 - June 2024)
- Final design, permitting, bidding (July 2025 - June 2026)
- Construction (Fall 2026)

If funding was secured what is the anticipated project start date?

10/1/2025

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?

The U.S. Forest Service will be responsible for overseeing ongoing operations of this project.

Please explain any public engagement that has taken place for this project.

The public was engaged during the development of the 2022 Gallatin River Restoration Strategy the planning document that creates a holistic approach to recreation management along the Gallatin River corridor and identifies short, mid, and long-term actions to guide Forest Service implementation of river access improvements and ecological restoration projects over the next 10 to 15 years. Additionally, project stakeholders are engaged during site specific project design.

LAND/REAL PROPERTY

Is the acquisition of real property required for this project?

No

PROJECT CONSTRUCTION

What alternatives for the project were considered?

No Action Alternative - Do nothing, however, this would not address safety and environmental degradation concerns.

Decommission Alternative - Remove the site/prevent access, this would limit recreation opportunities which are important to the area's economy and recreation experience.

<p>Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts?</p>	<p>The project will not have any long-term impacts. Short-term impacts include temporary environmental impacts and noise which will be mitigated via the guidelines for construction management outlined in the construction contract and general permit for storm water discharges associated with construction activity.</p>
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REGULATIONS & PERMITTING

<p>Are there any relevant laws or regulations applicable to the project that we need to be aware of?</p>	<p>Yes, the project will need to follow the National Environmental Policy Act (NEPA) as well as national, state, and local permitting requirements for work in and around waterways including: MT, Fish, Wildlife and Parks SP 124 Permit, US Army Corps of Engineers 404 Permit, and Gallatin County Floodplain Permit.</p>
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<p>Do you have any contracts or formal agreements in place related to this project?</p>	<p>Yes, we have a contract for design and engineering services with WGM Group based in Bozeman.</p> <p>We also operate under a challenge cost-share agreement (21-CS-11011100-017) with the United States Department of Agriculture (USDA), Forest Service, Custer Gallatin National Forest under the authority: Department of Interior and Related Agencies Appropriation Act of 1992, Pub. L. 102-154. The purpose of the agreement is to document the cooperation between the parties to work collaboratively to achieve a common mission in the management of the Gallatin River watershed in accordance with the annual Operating and Financial Plan developed by both parties.</p>
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<p>What are the necessary permits and zoning approvals for this project and have they been secured?</p>	<p>There are no zoning approvals required for this project. Permits are described above under laws and regulations.</p>
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CAPITAL STACK Financing of the project

Please complete the table with project funding sources and detail.

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category.

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated? The project cost estimate was provided by our engineering contractor WGM Group in September 2024.

Has your board committed to taking on debt, if so, how much? No, our board has not committed to taking on debt.

What barriers to accessing finance does this project face? This project will not be financed. It will be funded via private donations and grants.

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid? We do not anticipate taking on debt. A 10-15% contingency for unanticipated construction costs is factored into the project budget.

ORGANIZATIONAL FINANCIAL CAPACITY

Does your organization have the authority (even if not implemented) to issue bonds or to levy mills? No

Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees? N/A

Are you at maximum capacity for bonds, assessments, mills, and fees? N/A

When was the last time you issued bonds or adjusted your assessments, mills, and fees? N/A

What is the sunset date of your current mills?	N/A
Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain	N/A
What other revenue streams does your organization have?	Revenue streams include: grants, events, individual donations, earned revenue, foundation donations, and corporate sponsorships.
Did you provide detail for more than 1 project in the phase 1 questionnaire?	Yes
PROJECT MANAGEMENT PROJECT 2	
Project Name (2)	Gallatin River Restoration - Porcupine/Beaver Creek River Access & Stream Improvements
Who is the primary internal staff contact on this project? (2)	Emily O'Connor
Who is the secondary internal staff contact on this project? (2)	Kristin Gardner
What is the weekly time commitment towards this project for these staff members? (2)	5-10 hours per week.
Provide a list of all key project stakeholders and key contributors. (2)	Project Partner: Custer-Gallatin National Forest Key Stakeholders: outfitters & guides, recreation/tourism, state and local agencies, environmental non-profit organizations

Provide a primary and secondary contact for each external project stakeholders and key contributors. (2)

Primary Partner Contact: Kathryn Barker, Bozeman District Recreation Manager

Secondary Partner Contact: Wendi Urie, Hebgen District Ranger

Stakeholders: Montana Whitewater, Wave Train Kayak, Gallatin River Guides, East Slope Outdoors, Jakes Horses, Canyon Adventures, Big Sky Community Organization, Visit Big Sky, MT DEQ, MT Fish, Wildlife and Parks, American Rivers, Trout Unlimited, Gallatin Watershed Council, Grow Wild.

Provide a bulleted list of project milestones. (2)

- Conceptual - 30% design (Complete, July 2022 - June 2023)
- 60-90% Design (Complete, July 2023 - June 2024)
- Final design, permitting, bidding (In progress, July 2024 - June 2025)
- Construction (Fall 2025/2026 - Dependent on FS Permitting)

If funding was secured what is the anticipated project start date? (2)

10/15/2025

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed? (2)

The U.S. Forest Service will be responsible for overseeing ongoing operations of this project.

Please explain any public engagement that has taken place for this project. (2)

The public was engaged during the development of the 2022 Gallatin River Restoration Strategy the planning document that creates a holistic approach to recreation management along the Gallatin River corridor and identifies short, mid, and long-term actions to guide Forest Service implementation of river access improvements and ecological restoration projects over the next 10 to 15 years. Additionally, project stakeholders are engaged during site specific project design.

LAND/REAL PROPERTY 2

Is the acquisition of real property required for this project? (2)

No

PROJECT CONSTRUCTION | PROJECT 2

What alternatives for the project were considered? (2)

No Action Alternative - Do nothing, however, this would not address safety and environmental degradation concerns.

Decommission Alternative - Remove the site/prevent access, this would limit recreation opportunities which are important to the area's economy and recreation experience.

Recreation Access Alternatives - During the preliminary design phase this project included 3 locations for the recreation access improvements which have been narrowed down to a preferred alternative.

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts? (2)

The project will not have any long-term impacts. Short-term impacts include temporary environmental impacts and noise which will be mitigated via the guidelines for construction management outlined in the construction contract and general permit for storm water discharges associated with construction activity.

REGULATIONS & PERMITTING | PROJECT 2

Are there any relevant laws or regulations applicable to the project that we need to be aware of? (2)

Yes, the project will need to follow the National Environmental Policy Act (NEPA) as well as national, state, and local permitting requirements for work in and around waterways including: MT, Fish, Wildlife and Parks SP 124 Permit, US Army Corps of Engineers 404 Permit, and Gallatin County Floodplain Permit.

Do you have any contracts or formal agreements in place related to this project? (2)

Yes, we have a contract for design and engineering services with WGM Group based in Bozeman.

We also operate under a challenge cost-share agreement (21-CS-11011100-017) with the United States Department of Agriculture (USDA), Forest Service, Custer Gallatin National Forest under the authority: Department of Interior and Related Agencies Appropriation Act of 1992, Pub. L. 102-154. The purpose of the agreement is to document the cooperation between the parties to work collaboratively to achieve a common mission in the management of the Gallatin River watershed in accordance with the annual Operating and Financial Plan developed by both parties.

What are the necessary permits and zoning approvals for this project and have they been secured? (2)

There are no zoning approvals required for this project. Permits are described above under laws and regulations.

CAPITAL STACK |
PROJECT 2

Financing of the project

Please complete the table with project funding sources and detail. (2)

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category. (2)

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated? (2)

The project cost estimate was provided by our engineering contractor WGM Group in September 2024.

Has your board committed to taking on debt, if so, how much? (2)

No, our board has not committed to taking on debt.

What barriers to accessing finance does this project face? (2)

This project will not be financed. It will be funded via private donations and grants.

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid? (2)

We do not anticipate taking on debt. A 10-15% contingency for unanticipated construction costs is factored into the project budget.

Did you provide detail for a 3rd project in the phase 1 questionnaire?

Yes

PROJECT
MANAGEMENT |
PROJECT 3

Project Name (3)

Gallatin River Restoration - Portal Creek River Access Improvement

Who is the primary internal staff contact on this project? (3)	Emily O'Connor
Who is the secondary internal staff contact on this project? (3)	Kristin Gardner
What is the weekly time commitment towards this project for these staff members? (3)	5-10 hours per week.
Provide a list of all key project stakeholders and key contributors. (3)	Project Partner: Custer-Gallatin National Forest Key Stakeholders: outfitters & guides, recreation/tourism, state and local agencies, environmental non-profit organizations
Provide a primary and secondary contact for each external project stakeholders and key contributors. (3)	Primary Partner Contact: Kathryn Barker, Bozeman District Recreation Manager Secondary Partner Contact: Wendi Urie, Hebgen District Ranger Stakeholders: Montana Whitewater, Wave Train Kayak, Gallatin River Guides, East Slope Outdoors, Jakes Horses, Canyon Adventures, Big Sky Community Organization, Visit Big Sky, MT DEQ, MT Fish, Wildlife and Parks, American Rivers, Trout Unlimited, Gallatin Watershed Council, Grow Wild.
Provide a bulleted list of project milestones. (3)	<ul style="list-style-type: none"> · Conceptual - 30% design (Complete, July 2023 - June 2024) · 60-90% Design (In-Progress, July 2024 - June 2025) · Final design, permitting, bidding (July 2026 - June 2027) · Construction (Fall 2027)
If funding was secured what is the anticipated project start date? (3)	10/1/2027
What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed? (3)	The U.S. Forest Service will be responsible for overseeing ongoing operations of this project.

Please explain any public engagement that has taken place for this project. (3)

The public was engaged during the development of the 2022 Gallatin River Restoration Strategy the planning document that creates a holistic approach to recreation management along the Gallatin River corridor and identifies short, mid, and long-term actions to guide Forest Service implementation of river access improvements and ecological restoration projects over the next 10 to 15 years. Additionally, project stakeholders are engaged during site specific project design.

LAND/REAL PROPERTY 3

Is the acquisition of real property required for this project? (3)

No

PROJECT CONSTRUCTION | PROJECT 3

What alternatives for the project were considered? (3)

No Action Alternative - Do nothing, however, this would not address safety and environmental degradation concerns.

Decommission Alternative - Remove the site/prevent access, this would limit recreation opportunities which are important to the area's economy and recreation experience.

Recreation Access Alternatives - During the preliminary design phase we will explore 2-3 design alternatives and select a preferred alternative.

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts? (3)

The project will not have any long-term impacts. Short-term impacts include temporary environmental impacts and noise which will be mitigated via the guidelines for construction management outlined in the construction contract and general permit for storm water discharges associated with construction activity.

REGULATIONS & PERMITTING | PROJECT 3

Are there any relevant laws or regulations applicable to the project that we need to be aware of? (3)

Yes, the project will need to follow the National Environmental Policy Act (NEPA) as well as national, state, and local permitting requirements for work in and around waterways including: MT, Fish, Wildlife and Parks SP 124 Permit, US Army Corps of Engineers 404 Permit, and Gallatin County Floodplain Permit.

Do you have any contracts or formal agreements in place related to this project? (3)

Yes, we have a contract for design and engineering services with WGM Group based in Bozeman.

We also operate under a challenge cost-share agreement (21-CS-11011100-017) with the United States Department of Agriculture (USDA), Forest Service, Custer Gallatin National Forest under the authority: Department of Interior and Related Agencies Appropriation Act of 1992, Pub. L. 102-154. The purpose of the agreement is to document the cooperation between the parties to work collaboratively to achieve a common mission in the management of the Gallatin River watershed in accordance with the annual Operating and Financial Plan developed by both parties.

What are the necessary permits and zoning approvals for this project and have they been secured? (3)

There are no zoning approvals required for this project. Permits are described above under laws and regulations.

CAPITAL STACK | Financing of the project
PROJECT 3

Please complete the table with project funding sources and detail. (3)

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category. (3)

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated? (3)

The project cost estimate was provided by our engineering contractor WGM Group in September 2024.

Has your board committed to taking on debt, if so, how much? (3)

No, our board has not committed to taking on debt.

What barriers to accessing finance does this project face? (3)

This project will not be financed. It will be funded via private donations and grants.

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid? (3)

We do not anticipate taking on debt. A 10-15% contingency for unanticipated construction costs is factored into the project budget.

Did you provide detail for a 4th project in the phase 1 questionnaire? (3)

Yes

PROJECT MANAGEMENT | PROJECT 4

Project Name (4) Gallatin River Restoration - Lower Deer/Green Bridge River Access Improvement

Who is the primary internal staff contact on this project? (4) Emily O'Connor

Who is the secondary internal staff contact on this project? (4) Kristin Gardner

What is the weekly time commitment towards this project for these staff members? (4) 5-10 hours per week.

Provide a list of all key project stakeholders and key contributors. (4) Project Partner: Custer-Gallatin National Forest
Key Stakeholders: outfitters & guides, recreation/tourism, state and local agencies, environmental non-profit organizations

Provide a primary and secondary contact for each external project stakeholders and key contributors. (4) Primary Partner Contact: Kathryn Barker, Bozeman District Recreation Manager
Secondary Partner Contact: Wendi Urie, Hebgen District Ranger
Stakeholders: Montana Whitewater, Wave Train Kayak, Gallatin River Guides, East Slope Outdoors, Jakes Horses, Canyon Adventures, Big Sky Community Organization, Visit Big Sky, MT DEQ, MT Fish, Wildlife and Parks, American Rivers, Trout Unlimited, Gallatin Watershed Council, Grow Wild.

Provide a bulleted list of project milestones. (4)

- 60-90% Design (Completed in 2019)
- Final design, permitting, bidding (July 2025 - June 2026)
- Construction (Fall 2026 or Fall 2027)

If funding was secured what is the anticipated project start date? (4) 10/1/2026

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed? (4)

The U.S. Forest Service will be responsible for overseeing ongoing operations of this project.

Please explain any public engagement that has taken place for this project. (4)

The public was engaged during the development of the 2022 Gallatin River Restoration Strategy the planning document that creates a holistic approach to recreation management along the Gallatin River corridor and identifies short, mid, and long-term actions to guide Forest Service implementation of river access improvements and ecological restoration projects over the next 10 to 15 years. Additionally, project stakeholders are engaged during site specific project design.

LAND/REAL PROPERTY 4

Is the acquisition of real property required for this project? (4)

No

PROJECT CONSTRUCTION | PROJECT 4

What alternatives for the project were considered? (4)

No Action Alternative - Do nothing, however, this would not address safety and environmental degradation concerns.

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts? (4)

The project will not have any long-term impacts. Short-term impacts include temporary environmental impacts and noise which will be mitigated via the guidelines for construction management outlined in the construction contract and general permit for storm water discharges associated with construction activity.

REGULATIONS & PERMITTING | PROJECT 4

Are there any relevant laws or regulations applicable to the project that we need to be aware of? (4)

Yes, the project will need to follow the National Environmental Policy Act (NEPA) as well as national, state, and local permitting requirements for work in and around waterways including: MT, Fish, Wildlife and Parks SP 124 Permit, US Army Corps of Engineers 404 Permit, and Gallatin County Floodplain Permit.

Do you have any contracts or formal agreements in place related to this project? (4)

Yes, we have a contract for design and engineering services with WGM Group based in Bozeman.

We also operate under a challenge cost-share agreement (21-CS-11011100-017) with the United States Department of Agriculture (USDA), Forest Service, Custer Gallatin National Forest under the authority: Department of Interior and Related Agencies Appropriation Act of 1992, Pub. L. 102-154. The purpose of the agreement is to document the cooperation between the parties to work collaboratively to achieve a common mission in the management of the Gallatin River watershed in accordance with the annual Operating and Financial Plan developed by both parties.

What are the necessary permits and zoning approvals for this project and have they been secured? (4)

There are no zoning approvals required for this project. Permits are described above under laws and regulations.

CAPITAL STACK | PROJECT 4

Financing of the project

Please complete the table with project funding sources and detail. (4)

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category. (4)

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated? (4)

The project cost estimate was provided by our engineering contractor WGM Group in September 2024.

Has your board committed to taking on debt, if so, how much? (4)

No, our board has not committed to taking on debt.

What barriers to accessing finance does this project face? (4)

This project will not be financed. It will be funded via private donations and grants.

What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid? (4)

We do not anticipate taking on debt. A 10-15% contingency for unanticipated construction costs is factored into the project budget.

Before submitting verify all responses for completion and accurateness.

All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).

GRTF – RIVER PARKING BUDGET

Funding Source	Amount	Explanation	Date secured or anticipated secure date	Are funds on hand and in bank account? (Y/N)	Next steps to secure funding	Restrictions/contingencies on funding source?	Repayment Required (Y/N)?
Resort Tax	\$ 221,954	40-50%	FY26 & FY27	N	Apply	N	N
Private Donations	\$ 51,955	Fundraising	FY26 & FY27	N	Raise funds	N	N
Grants	\$ 177,000	Foundations/Other	FY26 & FY27	N	Apply	N	N
Other***	\$ 20,000	Forest Service	FY26 & FY27	N	Cost Share Agreement	N	N
Total	\$ 470,909						

Expense Category	Cost
Engineering	\$ 40,000.00
General Contractor	\$ 296,250.00
Other Contract Services	\$ 55,000.00
Marketing, Advertising, and Communications	\$ 5,000.00
Payroll and Benefits	\$ 30,222.00
Contingency	\$ 44,437.00
Total	\$ 470,909.00

Title	Morningstar Campus Expansion	09/04/2024
	by Maribel Butan in CIP Phase 2	id. 47401274
	maribel@mlcbigsky.org	

Original Submission	09/04/2024
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Score	n/a
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PROJECT MANAGEMENT

Project Name	Morningstar Campus Expansion
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Who is the primary internal staff contact on this project?	Maribel Butan
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Who is the secondary internal staff contact on this project?	
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What is the weekly time commitment towards this project for these staff members?	Currently approximately 10-15 hours per week.
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Provide a list of all key project stakeholders and key contributors.

MLC Staff: Mariel Butan

MLC Building Development Committee: Alanah Griffith (chair), Stephanie Kissell, Mariel Butan, Becky Brockie, Todd Rossier, Kelly Hesse, Anna Johnson

MLC Board: Stephanie (chair), Ben Holst, Marie Goode, Chris Oliver, Alanah Griffith, Wes Hoecker, Allie Poalino

LMLC/YC Staff: Anna Johnson, Kelly Hesse, Matt Kidd, Frank Acito, Gayle Butler, Jackie Ng, Patrick Smoral

YCCF: Ciara Wolfe

45 Architecture and TD&H Engineering: Kim Everts, Sarah Kitchin, Hannah Hutchinson

Firelight Meadows HOA Board: Carol Powell (chair)

Big Sky Water & Sewer: Johnny O'Connor

Other people we've discussed this project with and anticipate signing on: SPCF (Hannah Waterbury), MCF (Anna Shipley), Greater Gallatin United Way (Kim Hall), Discovery Academy (Scott Poloff)

Provide a primary and secondary contact for each external project stakeholders and key contributors.

Mariel Butan: 5613015452, mariel@mlcbigsky.org

Alanah Griffith: 4066243585, alanah@bigskymtlaw.com

Stephanie Kissell: 4065995800, stephkissell@gmail.com

Anna Johnson: 4066005299, anna@bigsky.com

Ciara Wolfe: 4065702418, Ciara.wolfe@yellowstoneclub.com

45 Architecture: 4065772345, keverts@45arch.com

Carol Powell: carol.powell.firelight@gmail.com

Johnny O'Connor: 4069952660, johnny@wsd363.com

Provide a bulleted list of project milestones.

- March 2022 – 45 Architecture began feasibility study and pre-design phase
- November 2024 – Pre-design deliverables finalized
- January 2025 – Construction design phase begins
- September 2025 – Construction design finalized
- December 2025 – Groundbreaking
- Summer 2026 – Begin vertical construction
- October 2027 – Substantial completion

If funding was secured what is the anticipated project start date?

12/19/2025

What organization will be responsible for overseeing ongoing operations of this facility/project after construction is completed?

Morningstar Learning Center and Lone Mountain Land are investigating the operational structure that will best position child care in Big Sky moving forward. We are flexible on ownership and operations pending what we find to be the most advantageous funding mechanism.

Please explain any public engagement that has taken place for this project.

Since 2022, MLC has conducted multiple surveys and hosted multiple listening sessions to assess our community's need for expanded and improved child care facilities. We conducted listening sessions with both early educators and the general public to ensure that the needs of children, families, and teachers were all heard. The feedback collected from these efforts was channeled directly into MLC's original building plans, and the Firelight lot presented an opportunity to meet even more of that need. NRMEDD's Fall 2023 report provided further support for MLC's intended efforts and long-term vision of a new facility. On September 26th, a public event on The Business of Child care will be held through the Big Sky Chamber of Commerce.

LAND/REAL PROPERTY

Is the acquisition of real property required for this project?

No

PROJECT CONSTRUCTION

What alternatives for the project were considered?

Multiple alternatives were considered. First, we considered whether or not to do this project at all. It is not a need of MLC specifically but of the community. Second, we considered building this project on MLC's current available site. This site is not the most ideal due to its size, existing structure layout, ability to be utilized for housing, and topographical limitations. It would require MLC compromising on many of its desires for a new facility and would not have space for any other providers. Third, we considered building this project on the Firelight land unit currently owned by Lone Mountain Land Company. This site is larger, has no existing structures, is extremely limited in allowable uses (including child care), is entirely flat, is located next to the proposed new BSCO park, and would be able to accommodate not only expanded MLC programming but also other providers, making it an ideal alternative to building on MLC's land. While in talks with LMLC about building on this land, the LMLC team evaluated multiple other sites within their portfolio and determined that the Firelight unit was the best available option. More information about this can be made available upon request.

Will this project have any long-term impacts, such as increase traffic, parking, environmental impacts, water use, light pollution, and accessibility? And how do you plan to address these impacts?

This project will have a small increase in traffic along Ousel Falls Road. Traffic congestion will be reduced by providing a single entrance and utilizing existing access drives. The parking lot will be directional for increased safety of parents and children. A landscape buffer will be provided to the South facing Ousel Falls Road. The project is intended to connect to the Big Sky Water and Sewer District, preventing an additional well. Low-volume fixtures will be utilized, and native and resilient landscaping will reduce irrigation requirements. Down light and dark sky friendly exterior lights will be utilized for parking and exterior building lights. The project will be designed to be universally accessible for children and adults. The site is intended to be connected to the future proposed park to the north of the site, increasing the accessibility of public spaces.

REGULATIONS & PERMITTING

Are there any relevant laws or regulations applicable to the project that we need to be aware of?

It is required for the building to be in compliance with licensing and fire codes, dictating size and access of the spaces. The Firelight covenants highly restrict the use of the land. Since child care is one of the few allowed uses, we believe this is the best use of that space.

Do you have any contracts or formal agreements in place related to this project?

Morningstar has a contract in place with 45 Architecture and their engineers. The Big Sky Water & Sewer District previously expressed its willingness to serve the additional capacity at Morningstar's current campus and has provided instructions on pursuing annexation at the Firelight land unit. Morningstar has been meeting with LMLC monthly since becoming aware of their purchase of the Firelight land unit in Summer 2023 to answer LMLC's questions about Morningstar finances and discuss the possibility of building a new facility on the Firelight land unit. MLC and LMLC have been working on drafting a letter of intent to specify the terms of our year-long partnership to bring this project to fruition on LMLC's Firelight land unit.

At present, Lone Mountain Land Company owns the development and declarant rights for Unit CB of Firelight Meadows Condominiums. LMLC has expressed that they intend to continue owning the development rights while the land is developed. However, this may change pending Morningstar and LMLC's investigation into funding mechanisms for the project. LMLC has stated that they are willing to make the land available for an all-encompassing child care facility and that they invested in the purchase of the land to preserve it for child care use. They have agreed to pay the design fees to update Morningstar's original design to accommodate the new location. LMLC and YCCF have stated that they will secure philanthropic funding for the project.

What are the necessary permits and zoning approvals for this project and have they been secured?

The project would require a land use permit for the Firelight land unit. Annexation into the Big Sky Water and Sewer would be required. We would not be seeking any variances, and the building would comply with zoning and covenants.

CAPITAL STACK Financing of the project

Please complete the table with project funding sources and detail.

[CIP Funding Worksheet.xlsx](#)

Please complete the table with project expenses by category.

[CIP Expense Worksheet.xlsx](#)

Who completed the project cost estimate you provided in phase 1 and when what is estimated?	45 Architecture completed the cost estimate in Phase 1. They work with a cost estimator firm who will provide a more detailed cost estimate, including the breakdowns reflected above once the design is finalized in November.
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Has your board committed to taking on debt, if so, how much?	Morningstar's board has not yet voted on taking on debt; this will be discussed at our September board meeting.
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What barriers to accessing finance does this project face?	This is not a barrier, but this project will require a combination of public and private dollars, including philanthropy, to complete. What combination of these dollars will be needed will depend on the final ownership and operational structure, which MLC and LMLC are currently researching.
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What barriers to repayment are anticipated? In the event of a project change, how will debts be repaid?

ORGANIZATIONAL
FINACIAL CAPACITY

Does your organization have the authority (even if not implemented) to issue bonds or to levy mills?	no
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Are there statutory limits on how much you can issue in bonds, levy in assessments or mills, and charge fees?	No
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Are you at maximum capacity for bonds, assessments, mills, and fees?	n/a
When was the last time you issued bonds or adjusted your assessments, mills, and fees?	We increased tuition as of 9/1/24.
What is the sunset date of your current mills?	n/a
Do you plan to issue bonds, levy assessments or mills, or charge fees in the next 3 years? Please explain	We will continue charging (and increasing) tuition.
What other revenue streams does your organization have?	MLC's main non-philanthropic revenue stream is tuition. If the project is able to proceed on the Firelight land unit, there could be additional revenue streams of leasing space to other providers, depending on the operational plan, and rental income after our current facility is renovated into housing. In the meantime, the bulk of our revenue comes in the form of our annual fundraising and grant-writing efforts.
Did you provide detail for more than 1 project in the phase 1 questionnaire?	No
Before submitting verify all responses for completion and accurateness.	All information and documents provided are available to the public upon request. Reminder the submission deadline is Wednesday, September 4 at noon (mountain time).