

**AGENDA**  
**ANACONDA-DEER LODGE COUNTY**  
**COMMISSION WORK SESSION**  
**6 P.M. TUESDAY, SEPTEMBER 8, 2020**  
**Webex Conference**

Everyone is respectfully asked to follow these few Commission Rules of Procedure:

- **Please turn off or silence all cell phones and electronic devices that you are not using for this meeting.**
- **Please mute microphones unless you are speaking to eliminate background noise.**
- Call in users will be on mute until discussion or public comment
- **Please address all comments to the Commissioners and state your full name and address**
- Be courteous to all participants, allow one speaker to speak at a time
- **If able please use the raise the virtual hand when appropriate to speak and then un-raise your hand**
- If you can use the chat box, please send in questions and comments.
- **Be Mindful that all participants will be able to hear and see everything, and the meetings are recorded**

For more information on how to obtain a direct link phone the CEO office at 563-4000 or email your request to [Isturm@adlc.us](mailto:Isturm@adlc.us)

**Webex Meeting**

**Meeting Number:** 925464969

**Meeting password:** ADLC0420

**Join by phone:** +1-855-797-9485 US Toll free (Will require Meeting Number listed above)

**Join from a video system or application:**

Dial [925464969@montana.webex.com](tel:925464969)

You can also dial 173.243.2.68 and enter your meeting number

**Join using Microsoft Lync or Microsoft Skype for Business:**

Dial [925464969.montana@lync.webex.com](tel:925464969)

1. **Discussion** – The A-DLC Historic Resources Board - Review of Proposals for the ADLC Preservation Plan. (To be awarded at the Commission Meeting 9/15/20) - Gayla Hess
2. **Discussion** – Appointments to the Economic Development Board – Bill Everett
  - Two (2) County Commissioners appointed for a three-year term
  - Chief Executive or designee appointed for a four-year term
  - Planning Director or designee appointed for a four-year term
  - One (1) Legal Representative from A-DLC appointed for a four-year term
  - One (1) Accounting or Banking Representative from A-DLC appointed for a two-year term.
  - Director of the Anaconda Local Development Corporation appointed for a two-year term
  - Two (2) Citizens at Large that resides in A-DLC appointed for a one-year term

The following individuals have submitted letters of interest as of September 3, 2020:

Jim Davison  
Stefanie Thompson  
John Stoppler  
Pat Gallagher  
Con Malee  
Kristy McKay

3. **Discussion** – Resolution No. 20-24 (A), A Resolution Establishing the Mill Levy for Anaconda-Deer Lodge County for Fiscal Year 2020-2021 – John Sholey
4. **Discussion** – Pioneer Technical Contract to assist the county with a major subdivision in the East Yards. – Carl Hamming
5. **Discussion** – NextGen 9-1-1. Request For Proposal (RFP) – Carl Hamming
6. **Discussion** – Housing Market Analysis and Study two proposals received: Sanderson Stewart and Cushing Terrell. – Adam Vauthier
7. **Discussion** – Petition for the Abandonment of a small portion of Deer Lodge Drive, a dead-end spur street that is adjacent to property along Deer Lodge Drive and Harrison Street. – Adam Vauthier
8. **Discussion** – Petition for the Abandonment of a small portion of Polk Street, a dead-end spur street that is adjacent to property along/near Deer Lodge Drive. – Adam Vauthier
9. **Discussion** – Amended Petition to Declare Washington Street from Sixth Street to the Alley Between Washington and the Former Seventh Street, A City Street, in Anaconda-Deer Lodge County – Ben Krakowka
10. **Discussion** – Special Event Permit - Request to Close the Alley behind Copper Village for Octoberfest (October 10<sup>th</sup>). Lydia Janosko
11. **Discussion** – Request for a donation for a community event to be held October 18<sup>th</sup>, 2020 in Anaconda by Downtown Market. – Keenah (Downtown Market) (Email attached)
12. **Discussion** – Expansion of Anaconda-Deer Lodge County Fire District – RJ Tocher

### 13. **Miscellaneous**

Commissioner Mike Huotte:

Commissioner Steve Gates:

Commissioner Paul Smith

Commissioner Terry Vermeire:

Commissioner Kevin Hart:

CEO Bill Everett:

CA Ben Krakowka:

14. **Public Comment** – This is the time for members of the public to comment on items **NOT** appearing on this agenda that **fall within the Commission's jurisdiction**.

### 15. **ADLC Public Meeting Dates**

### 16. **Adjournment**

2020

## Anaconda-Deer Lodge County Public Meetings

PHASE II: Boards are to limit group size (less than 50) and maintain social distance.

Board Vacancies can be viewed on the A-DLC website: <https://adlc.us>

**September 7, 2020 – Labor Day Observed**

**Courthouse will be Closed**

**September 8, 2020 - 6 p.m. Commission Work Session - Webex**

[lsturm@adlc.us](mailto:lsturm@adlc.us)

**Webex Meeting**

**Meeting Number:** 925464969

**Meeting password:** ADLC0420

**Join by phone:** +1-855-797-9485 US Toll free (Will require Meeting Number listed above)

**Join from a video system or application:**

Dial [925464969@montana.webex.com](mailto:925464969@montana.webex.com)

You can also dial 173.243.2.68 and enter your meeting number

**Join using Microsoft Lync or Microsoft Skype for Business:**

Dial [925464969.montana@lync.webex.com](mailto:925464969.montana@lync.webex.com)

---

September 9, 2020 – 5:30 p.m. Old Works Golf Course

On-site tour to discuss maintenance

September 10, 2020 - 10:00 a.m. DUI Task Force Meeting

Community Service Center – 118 E. 7<sup>th</sup> St.

September 10, 2020 – 6:00 p.m. – Kennedy Common Alcohol Committee

Courthouse Courtroom

September 10, 2020 - 8:00 p.m. Tri-County Fair Board Meeting

Weed Board Building, 422 Fairgrounds Rd., Deer Lodge

September 10, 2020 - 4:30 p.m. Greenway Service District Board Meeting

Anaconda Pioneer Technical – 307 E. Park, Suite 421

September 14, 2020 - 4:30 p.m. Hearst Free Library Board of Trustees

Hearst Free Library – 401 Main St.

September 14, 2020 – 5:30 p.m. Old Works Golf Course Board Meeting

Old Works Golf Course

September 14, 2020 - 6 p.m. Planning Board Meeting

Community Service Center, Third Floor Conference

September 14, 2020 – 6 p.m. Park and Recreation Board Meeting

Community Service Center, First Floor Conference



Anaconda Historic Resources Board — 800 Main St., Anaconda, MT 59711 — (406) 563-4012

September 3, 2020

Commissioners:

The Historic Resources Board (HRB) has received and reviewed four [proposals](#) from consultants in response to the Request for Proposals ([RFP](#)) for an ADLC Historic Preservation Plan; submissions available by link or hardcopies available in Planning Office.

HRB and attendees reviewed each plan for consultant qualifications, steps and timeline, number of site visits, and level of community outreach at the August 24<sup>th</sup> meeting.

References for the top two proposals were contacted. At the August 31<sup>st</sup> meeting, the HRB voted to recommend the Lakota proposal to the Commission for this project based on the level of detail, proposed outreach, and the number of intended site visits to the community. Lakota group proposal budget totals \$28,870.

The HRB requests the Commission approve the recommendation of award for the Lakota Group.

Thank you.

Gayla Hess  
Anaconda-Deer Lodge County Historic Preservation Officer

Full links

Proposals [https://drive.google.com/drive/folders/1U-XK26WFrNnN\\_Cp4iXxUAuN\\_I3EbwPXt](https://drive.google.com/drive/folders/1U-XK26WFrNnN_Cp4iXxUAuN_I3EbwPXt)

RFP <https://www.adlc.us/bids.aspx?bidID=11>

**ANACONDA DEER LODGE COUNTY  
ORDINANCE NO. 262**

**AN ORDINANCE CREATING AN ECONOMIC DEVELOPMENT ADVISORY BOARD  
AND ESTABLISHING ITS POWERS AND DUTIES**

**BE IT ORDAINED BY THE COMMISSION OF ANACONDA-DEER LODGE COUNTY AS  
FOLLOWS:**

- I.** The Code of Ordinances, Anaconda-Deer Lodge County, Montana chapter 2, article II, Division 5, Subdivision XXII, Section 2-728 shall be repealed and replaced with the following language to read as follows:

**Sec. \_\_\_\_\_ . PURPOSE.**

1. Purpose. The purpose of the Economic Development Advisory Board shall be to implement and oversee the Economic Development and related provisions of the Remedy Coordination, Funding, and Settlement Agreement between Anaconda-Deer Lodge County (A-DLC) and Atlantic Richfield Company (AR) that was executed on June 12, 2020. The Board shall advise the Commission, and assist with development of certain areas of A-DLC, and collaborate with citizens to ensure the economic growth of A-DLC.

- II.** The Code of Ordinances, Anaconda-Deer Lodge County, Montana chapter 2, article II, Division 5, Subdivision XXII, Section 2-729 shall be repealed and replaced with the following language read as follows:

**Sec. \_\_\_\_\_ . POWERS and DUTIES.**

2. Powers and Duties. The Economic Development Advisory Board shall adhere to the relevant economic development provisions of the Remedy Coordination, Funding and Settlement Agreement, which include (but may not be limited to) Sections 5.2.8, 5.2.9, 5.2.10, 5.10.7, and 5.10.8.

- A. Adopt bylaws for its internal operation. Said bylaws shall be kept on file with the Clerk of Commission.

- III.** The Code of Ordinances, Anaconda-Deer Lodge County, Montana chapter 2, article II, Division 5, Subdivision XXII, Section 2-730 shall be repealed and replaced with the following language read as follows:

**Sec. \_\_\_\_\_ . JURISDICTION.**

3. Jurisdiction. The Economic Development Advisory Board shall advise the Commission on economic development activities associated with certain provisions of the Remedy Coordination, Funding and Settlement Agreement within A-DLC. The principal mission is to consider proposals and recommend funding allocations to the Commission from the Economic Development Trust Account as provided in the settlement agreement. The A-DLC Board of Commission shall have final approval of any Board recommendations.

- IV. The Code of Ordinances, Anaconda-Deer Lodge County, Montana chapter 2, article II, Division 5, Subdivision XXII, Section 2-731 shall be repealed and replaced with the following language read as follows:

Sec. \_\_\_\_\_ . **MEMBERSHIP.**

4. Membership. There shall be **nine (9) members** of the Economic Development Board. A quorum shall consist of **five (5) members**. The members shall be appointed by the Commission in accordance with the following:
- a. Two (2) representative from the Board of County Commission for Anaconda-Deer Lodge County appointed for a three-year term
  - b. Chief Executive Officer or his/her designee appointed for a four- year term
  - c. Planning Director or his/her designee appointed for a four-year term
  - d. One (1) Legal Representative from A-DLC appointed for a four-year term
  - e. One (1) Accounting or Banking Representative from A-DCL appointed for a two-year term
  - f. Director of the Anaconda Local Development Corporation appointed for a two-year term
  - g. Two (2) Citizens at Large that resides in A-DLC appointed to a one-year term

No Commissioner shall serve as Chairman or Vice-Chairman of the Economic Development Advisory Board.

**Board members shall serve without compensation.**

5. Term of Office. After the initial appointments to the Board, each member of the Board shall serve a four (4) year term.

- V. The Code of Ordinances, Anaconda-Deer Lodge County, Montana chapter 2, article II, Division 5, Subdivision XXII, Section 2-732 shall be repealed and replaced with the following language read as follows:

Sec. \_\_\_\_\_ . **MEETINGS.**

6. Meetings. The Economic Development Advisory Board shall meet at least quarterly and report to the Board of County Commission on an annual basis.

**VI.** The Code of Ordinances, Anaconda-Deer Lodge County, Montana chapter 2, article II, Division 5, Subdivision XXII, Section 2-733 shall be repealed and replaced with the following language read as follows:

**Sec. \_\_\_\_\_ . EFFECTIVE DATE.**

7. Effective Date. This Ordinance shall take effect thirty (30) days after approval.

**THEREFORE, BE IT ORDAINED** by the Anaconda-Deer Lodge County Commission that this Ordinance be incorporated into the Anaconda-Deer Lodge County Code of Ordinances and become legal and binding.



Kevin A. Hart, Chairperson  
Anaconda-Deer Lodge County Commission

APPROVED AS TO FORM AND LEGALITY:

  
County Attorney

Attest:

  
Clerk of the Commission

First Reading/Introduction: 7-14-20

Second Reading/Public Hearing: 7-28-20

Adoption Date: 8-4-20

Effective Date: 9-4-20



James Davison <jameshdavison@gmail.com>

---

**ADLC Economic Development Advisory Council**

11 messages

---

**James Davison** <jameshdavison@gmail.com>

To: Lori Sturm <lsturm@adlc.us>

~~Thu, Jul 16, 2020 at 11:30 PM~~

Cc: Heather Edwards <hedwards@adlc.us>

Dear Anaconda Deer Lodge County Commission,

I would like to take this means to put forth my name as a citizen member at large for the proposed Economic Development Advisory Board.

I believe I have the background, experience and education that would contribute to the endeavours of the advisory board.

As a practitioner in economic development for over 37 years I understand how projects work and what is needed to bring them to success. I understand the working of attracting business to our community as well as working hard to keep existing business alive and thriving. Helping home grown business expand and start up new enterprise was a key element of my career.

As executive director of ALDC I treated the operation as a small business. The development of several industrial areas and building gave me first hand knowledge of what it takes to open the doors every day and make payroll. I understand the development of infrastructure and how it takes time to work through the systems to achieve a successful plan.

I have a strong working knowledge of finance programs and what is required to leverage private funds with scarce public funds to encourage business development. I also know that we must challenge the businesses we work with to perform and set appropriate expectations.

I have expanded my degree in Business Management with many courses and certification programs in finance, loan development, business plan evaluation, project review the art and science of structuring a fair deal for all parties are among my numerous educational efforts.

I would ask that you consider my qualifications and appoint me to the board.

--  
Jim Davison  
609 E Commercial  
406 560-5538

8/6/2020

# Stefanie Thompson

706 E. Park Ave.  
Anaconda, MT 59711  
406-533-5017

August 26, 2020



Dear Mr. Everett,

My name is Stefanie Thompson, I am a lifelong resident of Anaconda as well as a business owner of two Anaconda businesses. I have, for the last few years, served as a board member for the ALDC and have enjoyed being a part of that group. I am extremely interested in doing what I can to be an active member of the community as the real change and success of our community and businesses depends on involvement. I have worked very hard over the years to be successful in my businesses and have found that is a big driving force for me to want our community to grow and prosper.

I am very much interested in joining the economic board to continue my service and to provide experience and input as a business owner and resident of our community.

Sincerely,



Stefanie Thompson

John L. Stoppler  
312 Fairview Street North  
Anaconda MT 59711

August 25, 2020

Lori Sturm  
Clerk of the Commission  
Anaconda Deer Lodge County  
800 Main Street  
Anaconda, MT 59711

Anaconda County Commissioners and Bill Everett Chief Executive

I would like to take this opportunity to express my interest in serving on the ADLC Economic Development Board. I have a strong passion for seeing the community of Anaconda once again as a strong and robust community where families want to live, work and play and where our business community thrives.

As a local business entrepreneur currently operating my own small business, I have a Bachelor of Science degree in economics and received my Law degree from the University of San Diego. My experience includes working in the corporate world for over 25 years for several Fortune 500 corporations as part of their Executive Leadership teams. I have an extensive background in analyzing and drafting contracts, legal documents, negotiating multi-billion-dollar settlements and managing and creating budgets and staffing analysis.

I am looking forward to serving our community in these exciting next steps in our economic redevelopment. Thank you for considering me for one of the board positions. If you have any questions or need any additional information, please feel free to contact me.

Sincerely,



John L. Stoppler

406-560-7062

John.stoppler@gmail.com

## Heather Edwards

---

**From:** Bill Everett  
**Sent:** Wednesday, August 26, 2020 2:37 PM  
**To:** Heather Edwards  
**Subject:** Fwd: Community Economic Development Funding Committee

Get [Outlook for iOS](#)

---

**From:** Pat Gallagher <Pat@mlfpllc.com>  
**Sent:** Wednesday, August 26, 2020 2:36:27 PM  
**To:** Bill Everett <beverett@adlc.us>  
**Subject:** Community Economic Development Funding Committee

Bill,

I am interested in being a member of the economic development funding committee. I have been an Anaconda Deer Lodge Resident most of my 52 years leaving only shortly for college and law school. I have practiced law in Anaconda for the last 25 years. I am excited to help on the funding committee to determine where future economic development funds should be spent in our community. Please consider this my request to be a member of that board. Thank you,

Patrick T. Gallagher

Wall, McLean & Gallagher, PLLC

A Montana Law Firm with offices in Helena and Anaconda

117 Main Street

P.O. Box 1413

Anaconda, MT 59711

Phone: 406-563-8409

Fax: 406-563-8400

[pat@mlfpllc.com](mailto:pat@mlfpllc.com)

[www.mlfpllc.com](http://www.mlfpllc.com)

NOTICE: This e-mail transmission and any documents accompanying it contain information originating from Wall, McLean & Gallagher, PLLC ("WMG"). The transmission and any accompanying information are intended solely for the named recipient(s) and may contain privileged, confidential and/or proprietary information belonging to WMG, its clients or other parties, legally protected by the Attorney-Client Privilege, the Work Product Doctrine or other applicable law. If you are not the intended recipient, disclosure of this information to you is inadvertent and unauthorized, and you are hereby notified that any disclosure, copying, distribution or the taking of any action in reliance on the contents of this information is strictly prohibited, that the documents should be destroyed immediately, and that you should confirm such destruction to Bobbi at [bobbi@mlfpllc.com](mailto:bobbi@mlfpllc.com) or (406) 563-8409. Thank you.

141 Anavista Rd.  
Anaconda, MT 59711

September 3, 2020

Lori Sturm  
Clerk of the Commission  
Anaconda Deer Lodge County  
800 Main Street  
Anaconda, MT 59711

Dear Lori:

Please accept this letter as an official application for appointment to the Anaconda Deer Lodge County Economic Development Advisory Board. As a 40-year resident of this county, I have a passion for seeing this area become a thriving community where people want to live, work and play, and I believe this board will play a pivotal role in facilitating this vision.

My background includes a college degree in business, over four decades of working in the business world and experience in opening and running two small businesses in Anaconda. I have been an active community volunteer for more than 35 years, serving on a variety of boards and committees including the Planning Board, Superfund advisory boards, the AWARE board, the Anaconda Community Hospital Foundation, Montana Ambassadors, the Southwest Montana Federal Credit Union Board, Old Works Golf Course Board and the local Food Bank. I have extensive experience in managing multi-million-dollar budgets and staffing to support operations.

Thank you for taking the time to consider me for one of the Citizens at-Large positions. If you have any questions or need additional information, please contact me.

Sincerely,

Con Malee  
406-660-2444  
Cmalee21@gmail.com

## Lori Sturm

---

**From:** Bill Everett  
**Sent:** Thursday, September 03, 2020 4:12 PM  
**To:** Lori Sturm; Heather Edwards; County Commissioners  
**Subject:** FW: Economic Development Board

**From:** Kristy McKay <KMckay@glacierbank.com>  
**Sent:** Thursday, September 3, 2020 3:58 PM  
**To:** Bill Everett <beverett@adlc.us>  
**Subject:** Economic Development Board

Bill,  
I am interested in serving on the Economic Development Board. I have 20 plus years in the financial industry. I am very passionate about seeing Anaconda thrive and hope to serve in any way I can. Thank you for your consideration

Kristy McKay



**Kristy McKay**

VP, Branch Manager

Office: 406.497.7108 | Fax: 406.563.5210

307 East Park Ave | Anaconda, MT 59711

[kmckay@glacierbank.com](mailto:kmckay@glacierbank.com) | [www.glacierbank.com](http://www.glacierbank.com)



This email message is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender by reply email and delete the original message.

**RESOLUTION NO. 20-24 (A)**  
**A RESOLUTION ESTABLISHING THE MILL LEVY**  
**FOR ANACONDA-DEER LODGE COUNTY**  
**FOR FISCAL YEAR 2020-2021**

BE IT RESOLVED by the Commission of Anaconda-Deer Lodge County as follows, to wit:  
That the following Mill Levy for FY 2020-2021 is hereby set for the area opposite the said name:

**COUNTY-WIDE FUNDS**

	<u>Number of Mills</u>	<u>Mill Value</u>
General Fund	89.00 mills	\$14,257
Road Fund	42.00 mills	\$14,257
Weed Control Fund	1.00 mills	\$14,257
Library Fund	1.00 mills	\$14,257
Law Enforcement	101.50 mills	\$14,257
Emergency Dispatch/9-1-1	35.00 mills	\$14,257
Care of Prisoners	35.00 mills	\$14,257
	304.50 mills	

**CITY**

City Differential	34.49 mills	\$5,293
City Fire District	126.00 mills	\$5,377

**AGENCY FUNDS**

Opportunity Volunteer Fire Fund	5.50 mills	\$1,819
Joint Fire District Volunteer Fire Fund	6.43 mills	\$505
West Valley Volunteer Fire Fund	12.00 mills	\$1,464
Lost Creek Volunteer Fire Fund	13.60 mills	\$641
Wise River Fire Fund	25.00 mills	\$283
Georgetown Volunteer Fire Fund		\$60.00/unit

**SPECIAL ASSESSMENT DISTRICTS**

Cemetery Fund (all but 12-C & 12-0)	0.00 mills	\$13,839
Opportunity Light District	35.00 mills	\$416
Soil and Conservation Fund	2.67 mills	\$5,041
West Valley Mosquito Control Fund	0.00 mills	\$1,251
Opportunity Mosquito Control Fund	0.00 mills	\$1,767
Wastewater Treatment Fund	Residential Fee:	\$215.00/unit
	Commercial Fee:	\$90.00/unit
Street Lighting District No. 140		\$0.019/square foot
Street Lighting District No. 150		\$0.028/square foot
Solid Waste Fund		\$72.00/unit
Solid Waste - Big Hole Fund		\$88.00/unit

TERESA ANN PAVING PROJECT SID #74

Amount remaining after 1st half	\$0.00
Amount remaining after 2nd half	\$0.00

ROAD MAINTENANCE 01-GT	PER PARCEL	\$357.00
------------------------	------------	----------

## SCHOOL DISTRICT LEVIES

### Elementary:

#### District No. 10 (Anaconda)

General Fund	83.96 mills
Transportation	4.53 mills
Bus Depreciation	0.95 mills
Tuition	24.5 mills
Adult Education	0.55 mills
Building Reserve	2.27 mills

#### District Joint 1 (Deer Lodge)

General Fund	106.57 mills
Transportation	13.89 mills
Bus Depreciation	9.62 mills
Technology	8.94 mills
Building Reserve	0 mills

#### District 12-C (Wise River)

General Fund	46.94 mills
--------------	-------------

#### District 12-C-16 (Wisdom)

General Fund	50.17 mills
--------------	-------------

### Secondary (High School):

#### District No. 10 (Anaconda)

General Fund	51.8 mills
Transportation	4.61 mills
Bus Depreciation	1.39 mills
Tuition	0 mills
Adult Education	1.32 mills
Building Reserve	1.74 mills

#### District Joint 1 (Powell County)

General Fund	60.55 mills
Transportation	5.49 mills
Bus Depreciation	3.1 mills
Tuition	1.73 mills
Adult Education	2.07 mills
Technology	3.78 mills
Building Reserve	1.29 mills
Debt Service	21.98 mills

Countywide Transportation Levy	3.44 mills	\$14,257
Countywide High School Retirement Levy	9.43 mills	\$14,257
Countywide Elementary Retirement Levy	25.59 mills	\$14,257

**SPECIAL LEVY VOTED FUNDS**

Library Special Levy	3.00	mills	\$14,257
Cemetery Special Levy	11.00	mills	\$13,839
Emergency Disaster	0.00	mills	\$14,257
Senior Transportation Special Levy	1.00	mills	\$14,257
Senior Services Special Levy	1.00	mills	\$14,257
Search & Rescue Special Levy	2.00	mills	\$14,257
Head Start Special Levy	4.00	mills	\$14,257
Jail General Obligation Debt	7.50	mills	\$14,257
West Valley Volunteer Fire Special Levy	30.00	mills	\$1,464

**STATE**

University Millage	6.00	mills	\$14,257
State Equalization Levy	40.00	mills	\$14,257
General County Equalization Levy (All Elementary Districts)	33.00	mills	\$14,257
General High School Equalization Levy	22.00	mills	\$14,257

Dated this 8th day of September, 2020.

---

Kevin Hart, Chairperson  
Anaconda-Deer Lodge County Commission

Attest:

---

Lori Sturm  
Clerk of the Commission

**SHORT FORM OF AGREEMENT  
BETWEEN OWNER AND ENGINEER  
FOR  
PROFESSIONAL SERVICES**

THIS IS AN AGREEMENT effective as of September 3, 2020 (“Effective Date”) between Anaconda – Deer Lodge County (“Owner”) and Pioneer Technical Services, Inc. (“Engineer”). Engineer agrees to provide the services described below to Owner for Engineering Support (“Project”).

Description of Engineer’s Services: The scope of work applicable to this project is attached (Exhibit A).

Owner and Engineer further agree as follows:

**1.01 Basic Agreement**

- A. Engineer shall provide, or cause to be provided, the services set forth in this Agreement, and Owner shall pay Engineer for such Services as set forth in Paragraph 10.01.

**2.01 Payment Procedures**

- A. *Preparation of Invoices.* Engineer will prepare a monthly invoice in accordance with Engineer’s standard invoicing practices and submit the invoice to Owner.
- B. *Payment of Invoices.* Invoices are due and payable within 30 days of receipt. If for any reason, Engineer does not receive payment for fees within ten (10) business days of the expected date of receipt, then, after given seven days written notice to Owner, Engineer may suspend performance of all services until all past due fees are paid in full. Engineer shall have no liability for any losses due to suspending or placing any services on hold for non-payment. If Owner fails to make any payment due Engineer for services and expenses within 30 days after receipt of Engineer’s invoice, the amounts due Engineer will be increased at the rate of 1.0% per month (or the maximum rate of interest permitted by law, if less) from said thirtieth day.

**3.01 Additional Services**

- A. If authorized by Owner, or if required because of changes in the Project, Engineer shall furnish services in addition to those set forth above.
- B. Owner shall pay Engineer for such additional services as follows: For additional services of Engineer’s employees engaged directly on the Project an amount equal to the cumulative hours charged to the Project by each class of Engineer’s employees times standard hourly rates for each applicable billing class; plus reimbursable expenses and Engineer’s consultants’ charges, if any.

#### 4.01 Termination

A. The obligation to provide further services under this Agreement may be terminated:

1. For cause,

a. By either party upon 30 days written notice in the event of substantial failure by the other party to perform in accordance with the Agreement's terms through no fault of the terminating party.

b. By Engineer:

1) upon seven days written notice if Engineer believes that Engineer is being requested by Owner to furnish or perform services contrary to Engineer's responsibilities as a licensed professional; or

2) upon seven days written notice if the Engineer's services for the Project are delayed or suspended for more than 90 days for reasons beyond Engineer's control.

3) Engineer shall have no liability to Owner on account of such termination.

c. Notwithstanding the foregoing, this Agreement will not terminate as a result of a substantial failure under paragraph 4.01.A.1.a if the party receiving such notice begins, within seven days of receipt of such notice, to correct its failure and proceeds diligently to cure such failure within no more than 30 days of receipt of notice; provided, however, that if and to the extent such substantial failure cannot be reasonably cured within such 30 day period, and if such party has diligently attempted to cure the same and thereafter continues diligently to cure the same, then the cure period provided for herein shall extend up to, but in no case more than, 60 days after the date of receipt of the notice.

2. For convenience, by Owner effective upon the receipt of notice by Engineer.

B. The terminating party under paragraphs 4.01.A.1 or 4.01.A.2 may set the effective date of termination at a time up to 30 days later than otherwise provided to allow Engineer to demobilize personnel and equipment from the Project site, to complete tasks whose value would otherwise be lost, to prepare notes as to the status of completed and uncompleted tasks, and to assemble Project materials in orderly files.

#### 5.01 Controlling Law

A. This Agreement is to be governed by the law of the state in which the Project is located.

### 6.01 Successors, Assigns, and Beneficiaries

- A. Owner and Engineer each is hereby bound and the partners, successors, executors, administrators, and legal representatives of Owner and Engineer (and to the extent permitted by paragraph 6.01.B the assigns of Owner and Engineer) are hereby bound to the other party to this Agreement and to the partners, successors, executors, administrators, and legal representatives (and said assigns) of such other party, in respect of all covenants, agreements, and obligations of this Agreement.
- B. Neither Owner nor Engineer may assign, sublet, or transfer any rights under or interest (including, but without limitation, moneys that are due or may become due) in this Agreement without the written consent of the other, except to the extent that any assignment, subletting, or transfer is mandated or restricted by law. Unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under this Agreement.

### 7.01 General Considerations

- A. The standard of care for all professional engineering and related services performed or furnished by Engineer under this Agreement will be the care and skill ordinarily used by members of the subject profession practicing under similar circumstances at the same time and in the same locality. Engineer makes no warranties, express or implied, under this Agreement or otherwise, in connection with Engineer's services. Engineer and its consultants may use or rely upon the design services of others, including, but not limited to, contractors, manufacturers, and suppliers.
- B. Engineer shall not at any time supervise, direct, or have control over any contractor's work, nor shall Engineer have authority over or responsibility for the means, methods, techniques, sequences, or procedures of construction selected or used by any contractor, for safety precautions and programs incident to a contractor's work progress, nor for any failure of any contractor to comply with laws and regulations applicable to contractor's work.
- C. Engineer neither guarantees the performance of any contractor nor assumes responsibility for any contractor's failure to furnish and perform its work in accordance with the contract between Owner and such contractor.
- D. Engineer shall not be responsible for the acts or omissions of any contractor, subcontractor, or supplier, or of any contractor's agents or employees or any other persons (except Engineer's own employees) at the Project site or otherwise furnishing or performing any of construction work; or for any decision made on interpretations or clarifications of the construction contract given by Owner without consultation and advice of Engineer.
- E. The general conditions for any construction contract documents prepared hereunder are to be the "Standard General Conditions of the Construction Contract" as prepared by the Engineers Joint Contract Documents Committee (No. C-700. 2002 Edition).
- F. All design documents prepared or furnished by Engineer are instruments of service, and Engineer retains an ownership and property interest (including the copyright and the right of reuse) in such documents, whether or not the Project is completed.

- G. To the fullest extent permitted by law, Owner and Engineer (1) waive against each other, and the other's employees, officers, directors, agents, insurers, partners, and consultants, any and all claims for or entitlement to special, incidental, indirect, or consequential damages arising out of, resulting from, or in any way related to the Project, and (2) agree that Engineer's total liability to Owner under this Agreement shall be limited to \$50,000 or the total amount of compensation received by Engineer, whichever is greater.
- H. The parties acknowledge that Engineer's scope of services does not include any services related to a Hazardous Environmental Condition (the presence of asbestos, PCBs, petroleum, hazardous substances or waste, and radioactive materials). If Engineer or any other party encounters a Hazardous Environmental Condition, Engineer may, at its option and without liability for consequential or any other damages, suspend performance of services on the portion of the Project affected thereby until Owner: (i) retains appropriate specialist consultants or contractors to identify and, as appropriate, abate, remediate, or remove Hazardous Environmental Condition; and (ii) warrants that the Site is in full compliance with applicable Laws and Regulations.

### 8.01 Total Agreement

- A. This Agreement (consisting of pages 1 to 5 inclusive together with any expressly incorporated appendix), constitutes the entire agreement between Owner and Engineer and supersedes all prior written or oral understandings. This Agreement may only be amended, supplemented, modified, or canceled by a duly executed written instrument.

### 9.01 Project Representatives

- A. All notifications with respect to this contract shall be directed to the Project Representatives designated below:

Owner Representative:

Carl Hamming  
Anaconda – Deer Lodge County  
800 Main Street  
Anaconda, MT 59711  
(406) 563-4015  
chamming@adlc.com

Engineer Representative:

Andy White  
Pioneer Technical Services, Inc.  
307 E. Park, Suite 421  
Anaconda, MT 59711  
(406) 723-1958  
awhite@pioneer-technical.com

**10.01 Payment (Hourly Rates Plus Reimbursable Expenses)**

- A. Using the procedures set forth in paragraph 2.01, Owner shall pay Engineer as follows:
  - 1. An amount equal to the cumulative hours charged to the Project by each class of Engineer's employees times standard hourly rates for each applicable billing class for all services performed on the Project, plus reimbursable expenses and Engineer's consultants' charges, if any.
  - 2. The total compensation for services and reimbursable expenses is not to exceed: \$49,680.00 without prior written approval.
  - 3. If for any reason, Engineer does not receive payment for fees within ten (10) business days of the expected date of receipt, then, after given seven days written notice to Owner, Engineer may suspend performance of all services until all past due fees are paid in full. Engineer shall have no liability for any losses due to suspending or placing any services on hold for non-payment.
- B. This Agreement shall be effective for the period beginning on the date first written above and shall terminate on November 1, 2021.

**11.01 Schedule**

- A. **The date for initiating work on this project is contingent upon Owner acceptance and return of the signed contract.**
- B. This Agreement is effective as of the first date of service, whether prior to or after the date of execution of this Agreement and supersedes all previous contracts.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement, the Effective Date of which is the first date of service, whether prior to or after the date of execution of this Agreement and supersedes all previous contracts.

Facsimile, scanned and electronic signatures are deemed equivalent to original signatures for purposes of this Agreement.

OWNER: Anaconda – Deer Lodge County

ENGINEER: Pioneer Technical Services, Inc.

By: \_\_\_\_\_

By:  \_\_\_\_\_

Title: \_\_\_\_\_

Title: Vice President

Date Signed: \_\_\_\_\_

Date Signed: September 3, 2020

## EXHIBIT A

September 3, 2020

Mr. Carl Hamming  
Planning Director  
Anaconda – Deer Lodge County  
chamming@adlc.com

RE: East Yard Subdivision in Anaconda  
Proposal for Professional Services

Dear Mr. Hamming:

Based on our discussions with you, Anaconda-Deer Lodge County (ADLC) is proposing to subdivide approximately 55 acres of the East Yard property located west of the existing slag piles near the Southeast edge of Anaconda (acreage is only an approximation pending finalization of eastern boundary adjustment, not included in this proposal). From what we understand portions of this property are currently being subdivided for a hotel and other uses. ADLC wishes to further subdivide the remaining approximately 55 acres of the property into 5 to 6 acre lots. We anticipate there would be 8 or 9 lots that would have property boundaries that radiate from the Phase 1 and Phase II Union Avenue and Filmore Street Improvements project that is currently under construction or planned. Therefore, we are proposing the following scope of work to complete the project:

### Scope of Services

#### *Preapplication Meeting*

We will attend one preapplication meeting with ADLC staff to fulfill that requirement.

#### *Site Survey and Base Mapping*

We will complete a site survey of the property including portions of some adjacent property as required to prepare the Preliminary Plat Exhibit. We will survey all marked utilities, found property corners, topography, and other found site features. A base map illustrating the site survey data and identified easements will be prepared for use in preparing the Preliminary Plat Exhibit.

#### *Existing Infrastructure Evaluation*

To ensure the most appropriate lot configuration, we will evaluate the existing infrastructure in the area around the proposed subdivision to confirm sufficient capacity. The following infrastructure will be evaluated:

- Water Distribution System
- Wastewater Collection System
- Storm Water Collection and Treatment System
- Transportation Network

We will contact the ADLC Public Works Department to obtain infrastructure information and complete the necessary preliminary analysis to verify capacity. We have assumed that the existing infrastructure located around the perimeter of the proposed subdivision will have the necessary capacity to support the proposed new subdivision. Additionally, we understand the lot boundaries will “radiate” from existing or planned streets, and an extension of Fillmore Street to Smelter Road, with no additional roads or streets required.

#### *Montana Department of Environmental Quality*

We will prepare a Municipal Facilities Exclusion (MFE) application and submit it to Montana Department of Environmental (DEQ) Quality. If the MFE is accepted by DEQ, a conceptual level design for the proposed infrastructure improvements will be prepared. This design will only include plan view alignments and approximate sizing. We have assumed preliminary and final design will be prepared during a future phase.

#### *Traffic Impact Study*

We will retain a subconsultant to prepare a Traffic Impact Study (TIS) for the project. This work is required as part of the major subdivision application process. The costs presented below are estimated based on previous work performed in the general geographic area, actual cost may vary pending selection of subconsultant to complete the TIS.

#### *Preliminary Plat Exhibit*

Building on information collected during the site survey, records research, Title Reports, and conceptual infrastructure design, we will prepare a Preliminary Plat Exhibit. We have assumed up to two revisions may be required after your review.

#### *Preliminary Plat Application*

We will complete the Preliminary Plat Application for your review. We have assumed that you will work with us to provide the necessary property information that we do not have access to. We have assumed up to two revisions will be necessary to address any comments you may have.

#### *Public Meetings and Hearings*

After ADLC acceptance of the Preliminary Plat Application, we will attend up to three meetings or hearings as part of the Preliminary Plat Application process. Our attendance will be primarily as support for ADLC if technical questions are raised about infrastructure.

#### *Excluded from the Scope of Work*

- Client-initiated changes to the layout after initial conceptual layout
- Preliminary and final infrastructure design services.
- Preparation of covenants
- Environmental sampling
- Test borings or drilling
- Geotechnical Investigations
- Variance Requests
- More than one pre-plat application resubmittal
- Negotiations with the public, adjacent property owners, or public officials

- Changes resulting from client-initiated delays
- Review or application fees
- Title Report costs
- Construction services
- Final Plat preparation or setting of property corners
- Fire Protection Plan
- Road or Street Design

**Schedule**

We anticipate the following schedule.

<b>Task</b>	<b>Approximate Completion Month</b>
Pre-application meeting	September 2020
Conceptual Lot Layout	30 days from Contract Execution
Site Survey and Base Mapping	October 2020
Existing Infrastructure Evaluation	December 2020
Traffic Impact Study	January 2021
Preliminary Plat Exhibit	January 2021
Initial Subdivision Application	February 2021
Anaconda-Deer Lodge Review	March 2021
Subsequent Application Submittal	May 2021
Meetings and Hearings	May – June 2021
Anaconda-Deer Lodge Approval*	July 2021
Contract End Date	November 1, 2021

\*estimate only

**Costs**

For budgeting this first phase of work, we have assumed the following cost breakdown:

<b>Description</b>	<b>Subtotal</b>
Site Survey and Base Mapping	\$3,500
Existing Infrastructure Evaluation	\$3,500
Montana DEQ	\$3,500
Traffic Impact Study	\$17,500
Preliminary Plat Exhibit	\$6,500
Preliminary Plat Application	\$5,500
Public Meetings and Hearings	\$3,200
Contingency (15%)	\$6,480
<b>Total</b>	<b>\$49,680</b>

As indicated above, we suggest a budget of \$49,680 for the work outlined above. As you can see this includes a contingency of nearly \$6,500. We believe these costs are conservative and you will only be invoiced for the actual (Time and Materials) cost of the work. If this scope and cost are agreeable to you, we will send you a standard contract for professional services for signature.

We are looking forward to working with you on this project and making it successful. Please contact us if you have any questions.

Sincerely,



Todd K. Kuxhaus, PE  
Project Manager



Andy White, PMP  
Senior Project Manager

# Request for Proposals

## For NextGen 911 Anaconda-Deer Lodge County Responses Due: October 2, 2020, 5PM

In the interest of safety of the residents of our community, Anaconda-Deer Lodge County applied for, and received, a Montana 911 Advisory Council grant from the Department of Administration.

This designated funding will be used to hire an experienced, qualified consultant to prepare the County's GIS data for NextGen 9-1-1 (NG9-1-1). ADLC is looking for a consultant to assist in the initial steps in preparing geographic information system (GIS) layers for Next Generation 9-1-1 that meet the NENA Standard for NG9-1-1 GIS Data Model NENA-STA-006.1.1-2020, February 18, 2020, and providing comparison checks of the data to evaluate completeness, find data gaps, and identify duplicates in the transition from legacy Enhanced 911(E911) Next Generation 9-1-1 (NG9-1-1).

### Scope of Work

#### Initial Preparation of Required NG 9-1-1 Layers and Standardization

The approach we are adopting focuses on completing the essential first steps in preparing our GIS layers for NG9-1-1 within an anticipated one year project, creating a NG9-1-1 GIS starter data set loaded into the NENA Next Generation 9-1-1 data model standard. We anticipate maintaining the master road centerline and site/structure address point GIS layers used for Anaconda Deer Lodge County within NENA data model for NG9-1-1. The consultant selected for this RFP must account for the NENA requirements for Legacy 911 transition from E911 to NG9-1-1 and add attribution to the NENA data model for feature level metadata. We intend to use this data schema for matching and maintaining our existing MSAG while also allowing our ability for daily map production and data development.

We plan to have our county GIS staff and existing GIS consultant do most of the editing required for this GIS conversion project. We anticipate this will be a multi-year process. The consultant will provide data loading, geodatabase model configuration, a framework for development and maintenance of GIS layers required for NG9-1-1 implementation, a method of comparison of required GIS layers with our Master Street Address Guide and ALI/TN 911 civic address call records assessment and reporting. Training was ruled ineligible by the funding source and cannot be reimbursed for this project. Existing training materials and best practices for editing NG9-1-1 required layers and comparing them to existing MSAG will be beneficial to our project. The consultant must provide the ability to assess, measure and report our GIS editing on a quarterly basis and provide feedback on our ability to meet NENA standards and best practices required for GIS data layers in NG9-1-1.

ADLC will provide the consultant with our MSAG and ALI/TN list, along with a copy of the most authoritative road centerline and site/structure address GIS files, and GIS layers or tables representing the emergency service number and emergency service zone maps used in E911. The consultant must compare the MSAG to our authoritative GIS files and report differences for 2 instances of the MSAG, one during the first quarter of the project and the final during the 4<sup>th</sup> and final quarter of the project. The consultant must provide geocoding locators with the ability to handle multiple community values, updated quarterly built from our road centerline file. ALI/TN non wireless caller addresses and ancillary address records will use this locator to geocode addresses and prepare "fishbone" style connectors from

the site/structure address point to the geocoded location on the road centerline to facilitate address road name and address range edits by the county.

#### Consultant Deliverables

- Clean and standardize all required, and applicable conditional and optional Legacy street name GIS fields and NG9-1-1 attributes used to facilitate comparisons between the legacy data including the Master Street Address Guide (MSAG) and Automated Location Identification Telephone Number list (ALI/TN) and the GIS layers road centerline, site/structure address points.
- Anaconda-Deer Lodge County GIS currently maintains address locations at the access point with a road centerline. The consultant will develop a GIS starter layer with site/structure points, potential unaddressed driveways and access ways, and access addresses where the driveway meets the nearest addressed road, based on aerial image data sources from Esri image basemaps and/or the Montana State Library image web services. These features must share a common unique ID. They will be based on image interpretation. ADLC will be responsible for applying local knowledge and verification methods to revise and improve the driveway and access address locations over time and through iterative edits.
- Address locator built from the local RCL layer and capable of handling different geocoding roles for multiple MSAG and NG9-1-1 community names.
- Quarterly assessment and reporting of compliance with NENA data model parameters and NENA recommended best practices.
- Quarterly feature level reporting and metadata on NG9-1-1 RCL, SSAP and MSAG and ALI data layers
- Python script compatible with Esri ArcGIS Pro 2.6.0 with data formatted to be compliant with NENA Standard for NG9-1-1 GIS Data Model NENA-STA-006.1.1-2020, February 18, 2020. The data exported with the Python script should be consistent with GIS data exchange in an NG9-1-1 environment, regardless of the GIS data file format used for the exchange, are the naming conventions of each field in each layer, as well as the accompanying properties of each field described within this standard.

#### Comparison Checks for Completeness and Missing Data

Completeness checks typically involve summarizing individual layers looking for blank or null values and comparing some combination of full road name, minimum and maximum address range values, full address between two or more of four key layers including the MSAG, ALI/TN, Road Centerline and Site/Structures Address Points. Also examine Emergency Service Number area for completeness.

#### Comparison Checks for Duplicates

Duplicate checks involve summarizing individual layers and looking for duplicate attribute values or duplicate geometry. For Site/Structure Address points two separate duplicate address range checks are required, one for the point geometry and one for the address database attributes.

#### **Submittal**

All responses must be submitted to the Anaconda-Deer Lodge County Planning Department at by 5:00 p.m. local time on **October 2, 2020**. All responses MUST STATE “Anaconda-Deer Lodge County RFP for NextGen 911”.

### **Additional Information**

Questions or requests for more information may be directed to Carl Hamming, Planning Director at (406) 563-4015 or 800 Main St., Anaconda, MT 59711.

Respondents may review the Montana 911 application which includes a description of the proposed project including activities, budget, schedule, and other pertinent information by visiting the Planning Department (800 Main St., Anaconda, MT 59711) during regular office hours.

Anaconda-Deer Lodge County is an Equal Opportunity Employer. Women-owned, minority-owned and Section 3 Businesses are encouraged to submit proposals.



Response to Request for  
Proposals for:

Housing Market  
Analysis & Study

Submitted to:  
Chief Executive's Office  
Anaconda-Deer Lodge County  
800 Main Street  
Anaconda, Montana 59711

Submitted by:  
Sanderson Stewart  
1610 Ellis Street, Suite 2B  
Bozeman, Montana 59715  
406.522.9876

# ANACONDA-DEER LODGE COUNTY

Housing  
Market Analysis  
& Study

## PROPOSAL

July 24, 2020

July 24, 2020

Chief Executive's Office  
Anaconda-Deer Lodge County  
800 Main Street  
Anaconda, Montana 59711

Reference: Response to Request for Proposals for Anaconda-Deer Lodge County Housing Market Analysis & Study

Dear Selection Committee:

Sanderson Stewart is pleased to submit this proposal for the Housing Market Analysis & Study. Our firm is committed to Anaconda-Deer Lodge County; from our relationships developed with the community and key stakeholders in the area, to our work on the Anaconda Downtown Master Plan, we have proven that we care about Anaconda's future and the people who call it home.

This project will identify the county's greatest housing needs and challenges and address solutions to these challenges with the ultimate goal of transforming the former "company town" into an enduring and self-sustaining community. Our team, led by Lauren Waterton, AICP as project manager, will provide:

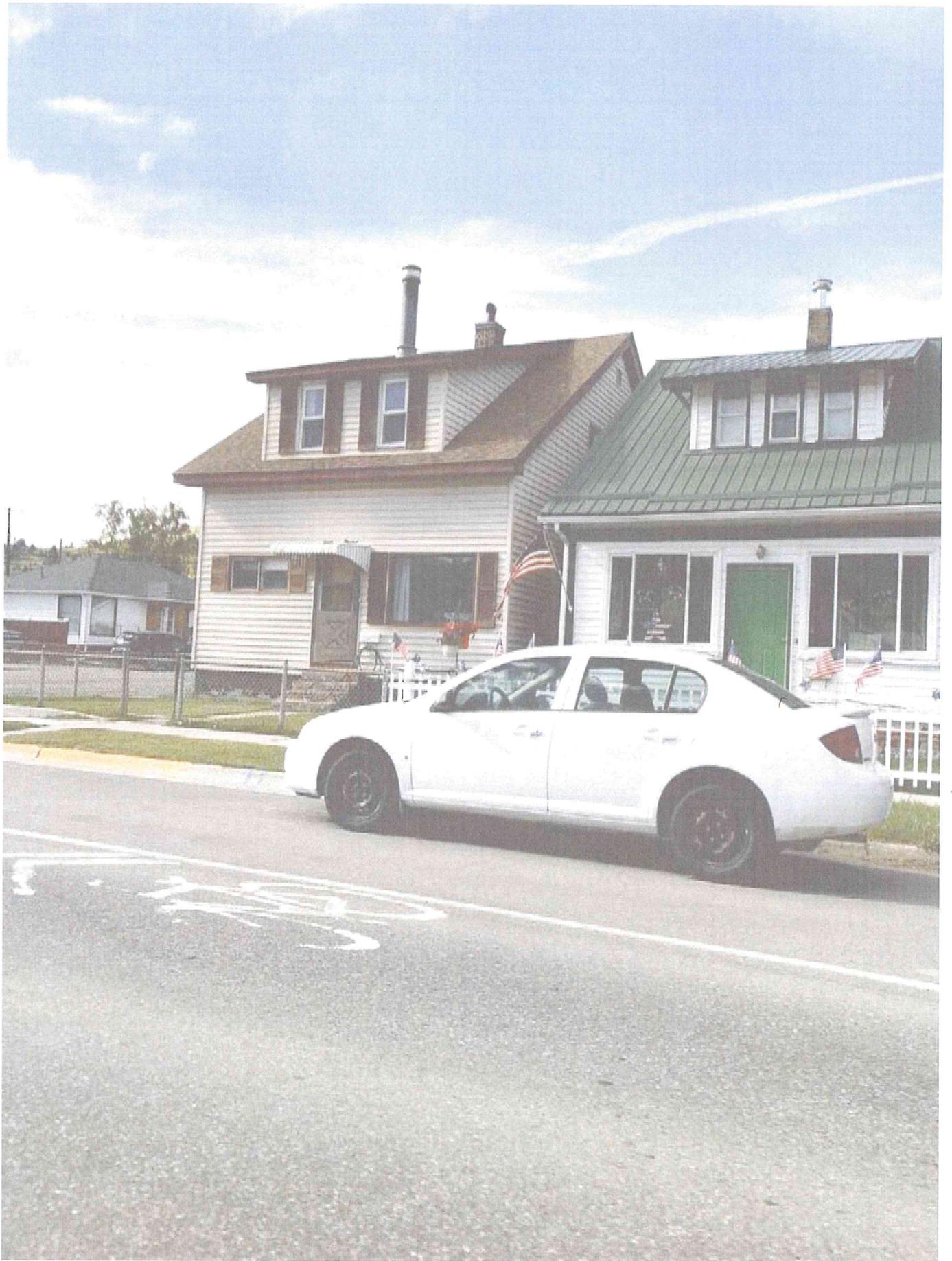
- A Housing Needs Assessment
- A Housing Market Study
- Strategies to Address Housing Needs & Challenges

We are extremely excited about the opportunity to grow our working relationship with Anaconda-Deer Lodge County, and we thank you for your consideration. Should you have any questions regarding the content of this proposal or require additional information, please contact me via phone at 406.922.4313 or email at [lwaterton@sandersonstewart.com](mailto:lwaterton@sandersonstewart.com).

Sincerely,



Lauren Waterton, AICP  
Associate | Placemaking Studio Manager | Project Manager  
Sanderson Stewart  
1610 Ellis Street, Suite 2B  
Bozeman, MT 59715



# Table of Contents

	Page
1. Firm Introduction	1
2. History with Anaconda-Deer Lodge County	2
3. Project Understanding	3
4. Project Approach	4
5. Scope of Work	5
6. Schedule	8
7. Dedicated Project Team	8
8. Key Past Projects	11
Appendix: Resumes	

# 1. Firm Introduction

SANDERSONSTEWART



1610 Ellis Street, Suite 2B  
Bozeman, MT 59715  
406.522.9876

Project Manager & Main Project Contact:  
Lauren Waterton, AICP  
lwaterton@sandersonstewart.com

## Why Sanderson Stewart?

- We are committed to continuing to serve this community; this isn't a "one and done" effort for our team
- We have background knowledge of the area and the economic drivers in the area, which we will use to inform this study
- We have the technical expertise to complete the work

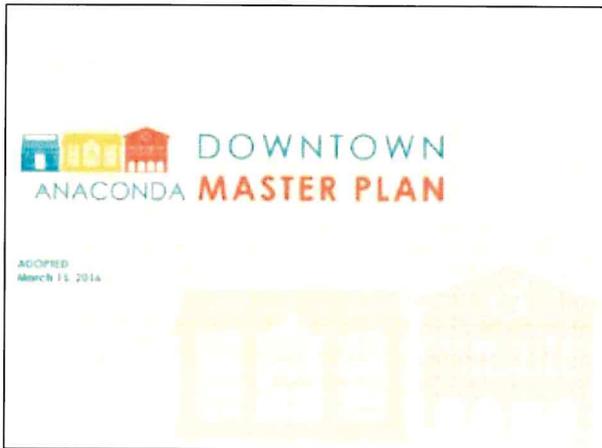
*To Plan and Design Enduring Communities.* That's our core purpose and the heart of what we do. From our beginning in a garage in 1969, Sanderson Stewart has followed this core purpose to become a regionally respected community design firm offering services for community planning, landscape and placemaking, infrastructure engineering, surveying and mapping, and branding. Our design professionals provide a comprehensive set of planning and design services, working to build enduring communities throughout the Rocky Mountain Region. Our firm consists of 64 multidisciplinary design professionals working in four offices including: Bozeman and Billings, Montana, and Denver and Fort Collins, Colorado.

**Our team will be led by Sanderson Stewart's Placemaking Studio.** The Studio provides a people-centered approach to the planning and design services offered by the company. Placemaking can improve public and private spaces like affordable housing, buildings, streets, sidewalks, and parks by creating opportunities for social interaction to create healthy and vibrant environments. Placemaking doesn't just focus on the physical aspects of a place, but also fosters a process that builds and supports community assets and potential.

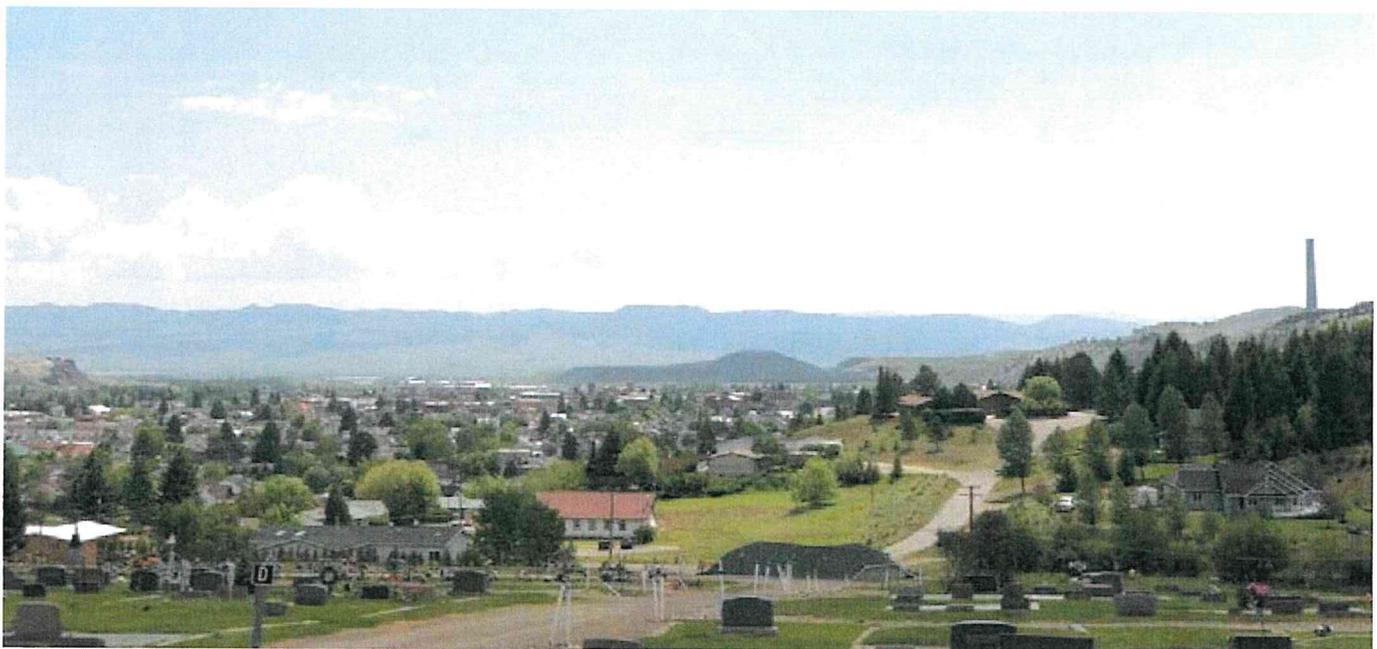
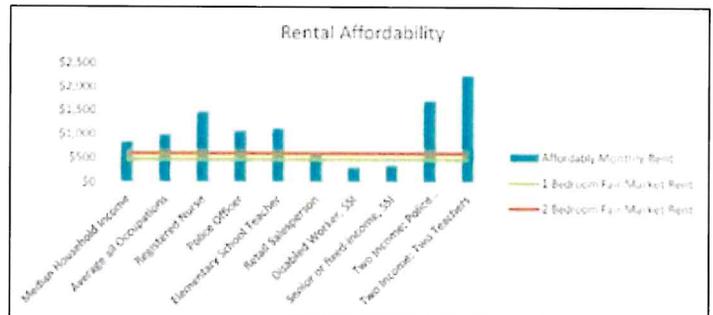
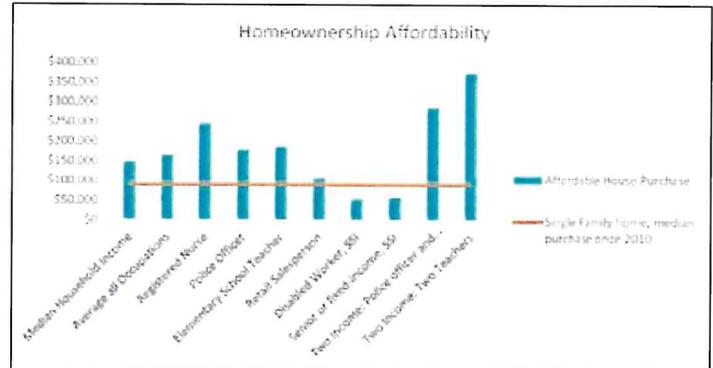


## 2. History with Anaconda-Deer Lodge County

In 2015 and 2016, Sanderson Stewart worked with the Anaconda community to complete the Downtown Master Plan. The Plan created a comprehensive framework for the community to develop successful actions and programs aimed at building a strong downtown. Through our nearly year-long work with Anaconda, we came to understand the challenge within the communities, as well as the opportunities and the optimism that lives within the community. We look forward to building from the knowledge and helping the community of Anaconda create a robust and successful housing market.



Examples of applicable data collected and analyzed by Sanderson Stewart for the Anaconda Downtown Master Plan



# 3. Project Understanding

A Housing Market Analysis & Study is not just a collection of data and facts, although it starts there. It is more than even the subsequent analysis of those facts. It is the understanding of the facts, by understanding the context of the community, that provides meaning to the data. Through that process, a path of action is set to address the needs and achieve the goals.

A community's housing stock and market is critical to its economy and quality of life. As something so important, it needs to be actively monitored where it intersects with public policy. Also, because it consists of so many disparate actors, it needs to be examined and organized to ensure that it is meeting the needs of the community, both existing and future. A Housing Study team must be able to bridge the gaps between data, policy and place.

Sanderson Stewart will provide the kind of data analysis that will help Anaconda focus on those policy actions that can support the development of a healthy housing market with affordability and choices. *We will do it through a process that considers the community and planning context.* Helping to answer questions such as:

- *Where can housing be built?*
- *What kind of housing can be built and does it match with what is needed?*
- *Are there ways to maintain or improve the integrity of the existing historical housing stock?*
- *Are, or are not, the needs of the current and future economic drivers and their workforces being supported?*

## Outcomes

Sanderson Stewart is a multi-disciplinary firm, providing a wide range of perspectives ensuring a comprehensive approach to the Housing Study. We provide development services to our residential development clients throughout Montana. We provide residential planning and policy guidance to our public sector clients as well. This expertise in the planning, design and construction of residential development affords us insights into this specific industry. Coupled with our data analysis and long-range planning expertise, we will assist Anaconda to identify areas of greatest need and prioritize way to build future housing.



## 4. PROJECT APPROACH

We will begin this study by reaffirming the goals of the study and desired outcomes. Determining the market area will also be an early priority, and we will seek to align with existing data sources to ease research.

Our approach to data gathering is to combine government sources, such as from the Census Bureau and Bureau of Labor Statistics and the State of Montana, and industry sources, such as the National Association of Realtors, with local sources such as property owners, City- County staff and local Realtors.

### Data Collection

*Sanderson Stewart will collect quantitative and qualitative data.*

**Quantitative data** will include information from sources such as the Census Bureau on demographics (age, ethnicity, etc), households and income, and commuting. As well as Bureau of Labor Statistics on employment and business type, as necessary and available. We will look at this quantitative data over time in order to discern trends and changes. We will supplement this data from Federal sources with data from State sources and local government such as building permits and economic development activities.

**Qualitative data** to be collected will include visual assessments of the County's housing stock in order to create typologies, districts, and neighborhoods that will help organize the housing study. This assessment will include generalizations about era of construction and urban form as well as density and development type. This data will be crucial for the consideration of historic neighborhoods.

Sanderson Stewart will complete an inventory and factual analysis of the existing housing market. This inventory will include data on tenancy (rent vs own), median purchase prices and rents, volume of sales, and rate of construction. These will be analyzed over time based on historical data, as is available. The condition of existing housing will also be analyzed based on Census data covering the presence or absence of basic facilities. This information will be supplemented by interviews with those who are intimately familiar with the local housing market. The information collected here will be mirrored by

### Sanderson Stewart's Use of Data

For the Housing Market Analysis & Study, we will use available public data sources.

These include **Federal** sources such as the Census Bureau and Bureau of Labor Statistics as well as **State** of Montana and relevant **County** sources.

We will also use **industry** data sources such as local Realtor groups. **Having a licensed Realtor on our team means that we have access to multiple listing service research resources.**

**Personal** data sources will include local experts such as City-County staff, local Realtors, developers, and employers will provide insights that are not found in the data.

collection of the same data in adjacent and similar communities in the region, such as Butte-Silver Bow and Helena. The geographies (Example: Census Designated Place, Tract or County) chosen for data analysis and comparison will be based on the geographies used in the data sources, to allow for meaningful comparison.

To meet the required outcomes, Sanderson Stewart will examine relevant planning documents to determine size and density of likely future developments and generate a potential yield of new housing development. Based on rent and purchase prices and household income, Sanderson Stewart will examine housing affordability.

Other issues such as condition and accessibility will be surfaced through data and interviews with those intimately familiar with the local market (City and County staff, local Realtors). Population projections, including an analysis of the demographics of the future population, will be used to assess future demand for various housing types.



### **Public Outreach Strategy...**

By their nature, housing market studies are focused on data.

However, this data may not “ring true” with those who are intimately familiar with the community. Sanderson Stewart proposes to rely on stakeholders such as local Realtors, City- County staff, and local developers.



## 5. SCOPE OF WORK

**The scope of work is divided into 3 key areas: Housing Needs Assessment, a Housing Market Study, and Proposed Strategies.**

### TASK 1: HOUSING NEEDS ASSESSMENT

Sanderson Stewart will complete a Housing Needs assessment in order to identify and address the community's greatest housing needs and challenges. The following activities will be completed as part of the Housing Needs Assessment:

#### **Activity 1: Community Demographics**

We will use Federal, State and County sources to identify current community demographics. We will analyze these over time to highlight trends. Demographics to be considered include, but are not limited to, population, age, sex, and family status. Based on demographics, we will project the type of housing most in demand in the community. The number of bedrooms of local housing stock, as reported in the American Community Survey, will be matched with the number of families to see if there is a match or mis-match.

#### **Activity 2: Housing Inventory**

Using information from the Census Bureau and American Community Survey, a housing inventory will be completed that includes the total number of dwelling units, tenancy, age and condition. This data source will be supplemented through interviews with local experts.

#### **Activity 3: Housing Affordability & Suitability**

Housing affordability will be examined by comparing rent and housing price levels with household income levels. Using the HUD recommendation that households should spend 30% of their gross income on housing, we will be able to make assertions about how much of the local housing stock is affordable to households at different income levels.

#### **Activity 4: Current & Projected Labor Force**

The current and projected labor force will be addressed through a base industry analysis using the location quotient technique based on statistics from the BLS that shows in which industries Anaconda-Deer Lodge County has particular strengths. That information will then be used to project future employment growth.

#### **Activity 5: Other Indicators**

As we evaluate the housing needs, additional indicators data sources will be identified and evaluated.

## TASK 2: HOUSING MARKET STUDY

To provide Anaconda-Deer Lodge County with a comprehensive understanding housing within Anaconda, Sanderson Stewart will complete a Housing Market Study.

### **Activity 1: Market Area**

The Housing Market Study will begin with the decision on what will constitute the market area, as described in the Project Kickoff. This decision will be made in consultation with stakeholders and should align with available data sources in order to ease analysis.

### **Activity 2: Existing & Needed Amenities**

We know that communities are more than just housing. The amenities that are desired in the area will be noted through interviews with local experts. These amenities will then be compared with those that are currently present in the for sale and rental housing market. Policies to close those gaps will be suggested.

### **Activity 3: Market Rate Projects**

As the market study progresses, Sanderson Stewart will use the results as a lens to evaluate the market rate projects that are recently constructed or in the pipeline to evaluate their fit with what is demanded in the market both from a need and amenity based prospective.

### **Activity 4: Rent Restricted Projects**

As with market rate projects, Sanderson Stewart will evaluate the existing or proposed rent restricted projects for their match with needs and desired amenities. Sanderson Stewart assumes that Anaconda will be able to identify these projects.

### **Activity 5: Market Rate Economy**

Using data from the BLS and local economic development experts, the economy of the local market area will be analyzed considering employment, unemployment, labor force participation and age. Business activity and industries will also be analyzed for current health and potential growth and wage levels.

### **Activity 6: Evaluate Delineation of the Market Area**

As qualitative and quantitative data is collected and examined, the delineation of the market area will continue to be evaluated. *Does it make sense based on the data? Does it adequately capture what people consider to be the market area, regardless of data boundaries?* The costs and benefits of changing market area boundaries will be examined.

### **Activity 7: Identify Housing Trends**

When it comes to housing market trends, data tells an important part of the story, but only a part. Sanderson Stewart will look at the data to identify trends but will also utilize insights based on our residential development experience and stakeholder input to evaluate how well the local market is responding to these trends. While much is still unknown regarding the impact of COVID-19 on housing markets, its potential and likely impacts on trends will be considered.

### **Activity 8: Evaluate Market Rate Supply & Demand**

The functioning of the current supply of market rate housing will be compared to the need (demand) as can be identified through data. It will help answer the question whether those in the market are finding what they need or are settling for something, or taking other action, such as commuting. Vacancy rates, as reported in the American Community Survey, will be used as an input to this analysis as will the number of listings and closings seen in the market area.

## TASK 3: STRATEGIES

Sanderson Stewart will use comparisons of demographic and market data from surrounding communities as part of a process to develop strategies to address identified issues needs and challenges. This analysis will highlight differences and look to explain why these differences might exist and whether or not action, and what action, should be taken to address them. The same approach will be taken with the market data. With the goal of identifying ways that the Anaconda market can be strengthened to best serve its current and future residents and workforce, and economy.

### **Activity 1: Compare Demographic Data to Similar Communities for Differences**

Working with stakeholders, Sanderson Stewart will look for communities that are nearby and have similar social, demographic, and economic conditions. These communities will serve as the basis for comparison with Anaconda. We anticipate that nearby communities such as Butte and Deer Lodge will provide opportunity to evaluate. Communities with similar population size, such as Belgrade, Havre or Miles City may also provide insights. The similarities and differences will be displayed and key insights explained.

### **Activity 2: Compare Housing Market to Similar Communities to Identify Potential Improvements**

For the communities selected as appropriate comparisons, their housing market will be summarized based on available data. Sanderson Stewart will not perform housing market studies for surrounding communities but will look at broad trends and conditions to identify potential improvements that can make the Anaconda market more competitive.



## 6. Schedule

It is anticipated that the Housing Study will take approximately 6 months to complete once a contract has been signed and we are authorized to begin work.

## 7. Dedicated Project Team

### Organizational Chart



**ANACONDA-DEER LODGE  
COUNTY, MT**

#### Project Management



Mac Fogelsong, PE

**Principal-in-Charge**

Resource Allocation, QA/QC, Residential Development  
Policy & Expertise



Lauren Waterton, AICP

**Project Manager**

Project Team Leader, Main Project Contact, Research,  
Preliminary & Final Document Development



Karl Barton, AICP

**Senior Land Planner**

Research, Data Analysis, Preliminary  
& Final Document Assistance



Tony Gaddo, PE, REALTOR®

**Realtor | Senior Engineer**

Property Research & Valuations

## Staff Bios



### **Mac Fogelsong, PE** **Principal-in-Charge**

Mac is an expert in all things residential development. Over his 23 year career, Mac has helped developers work through the residential land development process to create enduring communities throughout the Rocky Mountain Region. Mac assists residential developers by performing initial feasibility studies and then working through platting, designing, permitting and construction. He has designed by multi-family and single family developments, including affordable housing.

**Role:** Residential Development Expertise & Policy Input, Resource allocation, QA/QC

**Years Experience:** 23

**Related Project Experience:** Starner Gardens Affordable Senior Housing, Ironwood Estates Single & Multifamily Subdivision, Copper Ridge Subdivision, Meadowlark Ranch Subdivision, various Habitat for Humanity subdivision developments in Yellowstone County



### **Lauren Waterton, AICP** **Project Manager**

As an Associate, Senior Land Planner, and Placemaking Studio Manager, Lauren's work centers on community planning, revitalization studies, and land development projects. With over 25 years of professional experience, Lauren focuses on creating plans and environments that support communities and the people that live there. Skilled at solving complex problems, Lauren has experience working in collaborative environments and bringing diverse people together to help achieve a common goal. She has extensive experience in a broad scope of planning projects including master planning, urban renewal and redevelopment, design review, and real estate development.

**Role:** Project team leader, main project contact

**Years Experience:** 25

**Related Project Experience:** Anaconda Downtown Master Plan, EBURD Downtown Billings Housing Study



**Karl Barton, AICP**  
**Senior Planner**

Karl joined the firm in 2017 as Senior Planner in the Placemaking Studio. Since 2007, he has worked as an urban planner, leading projects such as comprehensive, corridor and transportation plans, entitlement project management, and creating development code and design guidelines for downtowns. He has performed financial and fiscal analyses for infrastructure and development feasibility, including residential development of many types. Karl has spoken on the use of metrics and indicators in comprehensive plans to measure progress towards community goals and how to include considerations of the impacts on public health of how a city is planned, designed, built, and operated. He also guest lectured on urban planning, the entitlement process, and emerging topics in city building at the University of Denver Daniels College of Business.

**Role:** Data research and analysis, policy analysis, report drafting

**Years Experience:** 13

**Related Project Experience:** EBURD Downtown Billings Housing Study, Clear Creek County 2018 Housing Needs Assessment, Multi-family Development Feasibility Study (Greeley, Colorado)



**Tony Gaddo, PE, REALTOR®**  
**Realtor**

Tony is a senior transportation engineer and Realtor who is currently working as the City of Bozeman’s Right-of-Way Agent. His experience focuses in property acquisition and valuations, realty market research, negotiations, right-of-way design, title research/clearing, eminent domain support and public involvement. As a licensed Realtor, Tony’s access to the various property sale/valuation databases will be critical to this study’s success.

**Role:** Property valuation research and analysis

**Years Experience:** 15

**Related Project Experience:** City of Bozeman Right-of-Way Term Contract (over 20 individual task orders)



## 8. Key Past Projects



### Anaconda Downtown Master Plan

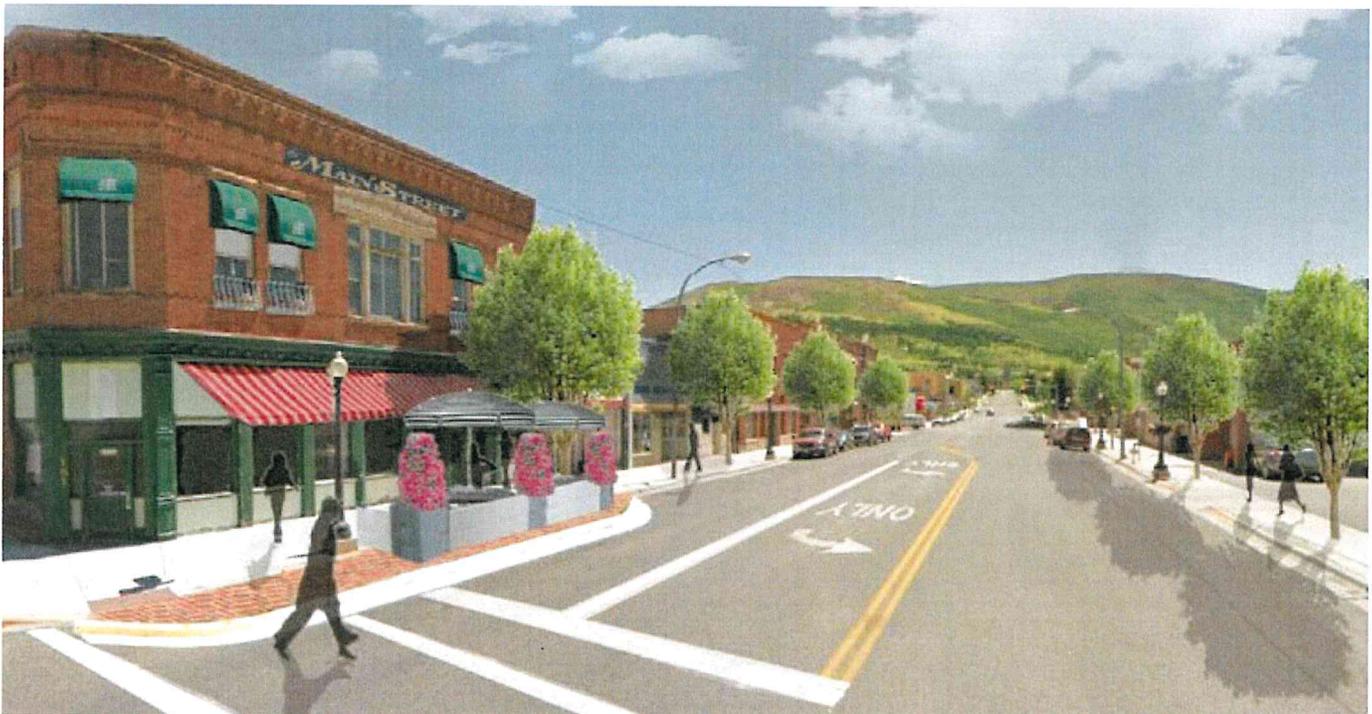
Anaconda-Deer Lodge County, Montana became part of the Montana Main Street Program in 2015. Sanderson Stewart worked with Anaconda Local Development Corporation to prepare a plan that would reflect the goals for downtown while helping them advance with the Main Street Program.

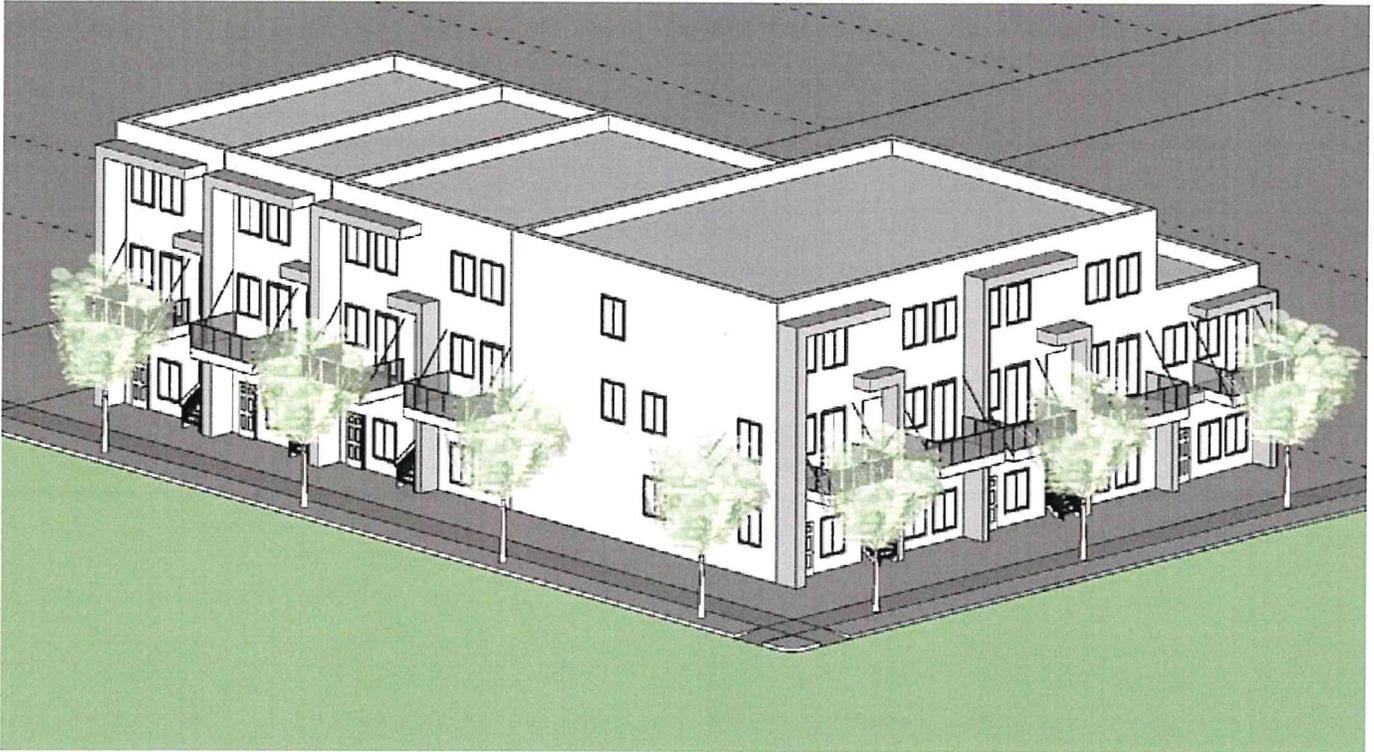
The primary purpose of the plan is to articulate a long-term vision and set practical, achievable strategies for improving downtown's appearance and economic vitality. The plan focused on the four elements of the Main Street program: economic restructuring, promotions, organization and design. Additionally, the plan identified goals and actions for preservation and enhancements of the historic downtown. Through public meetings, walking tours, community surveys and meetings with the staff, the Downtown Plan identifies specific action items to achieve the goals set by the community.

Coordination and implementation of the plan elements includes multiple agencies and non-profit organizations, including Anaconda-Deer Lodge County, Anaconda Local Development Corporation, Chamber of Commerce, Accelerate Anaconda, Downtown Tax Increment Financing District and the Anaconda Main Street Board.

#### Reference:

Adam Vauthier  
Former Executive Director  
Anaconda Local Development Corporation  
406.563.5538



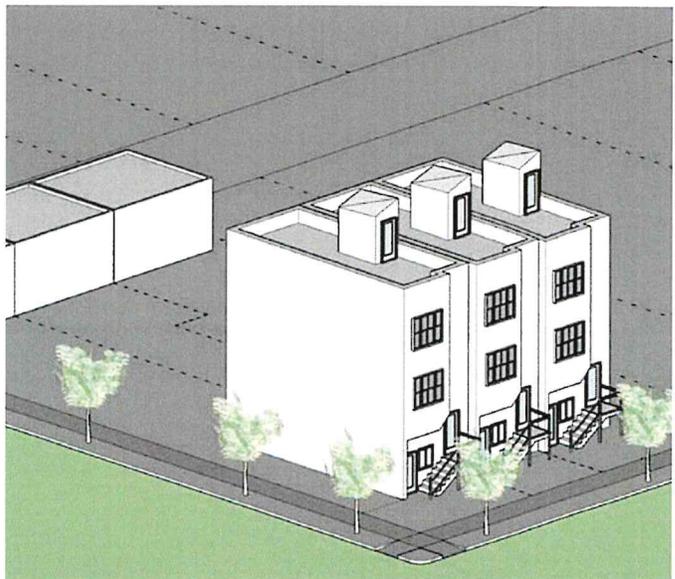
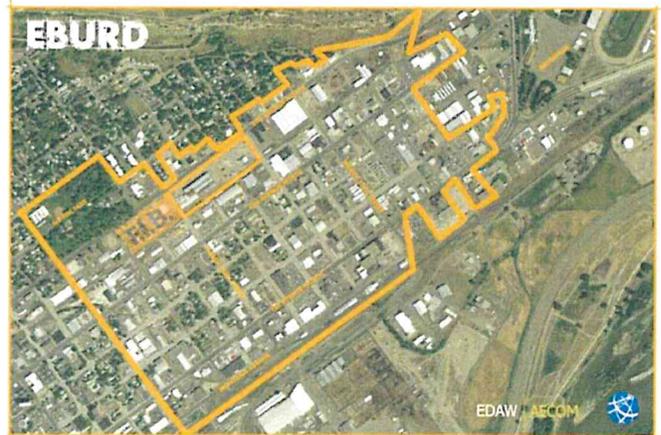


## East Billings Urban Renewal District (EBURD) Housing Study

The purpose of this project was to examine the feasibility of residential development in the East Billings Urban Renewal District (EBURD). Sanderson Stewart assisted in the selection of sites upon which to test three different housing types (townhomes, walk up apartments, and elevator served apartments) in order to determine likely densities. Deliverables included 3D models of the housing types on the lots, rendered in SketchUp, created to represent generic buildings so as to not divert the conversation into matters of style. The buildings were placed on the sites in conformance with Billings Zoning Code and standard site planning best practices. Parking was provided in a manner to meet market demand. Tables indicating the site size, number of units and number of parking spaces were also provided. Sanderson Stewart team members also participated in the well-received final presentation to the EBURD Board and interested stakeholders. After the presentation, it was reported that several parties expressed interest in developing in the District, indicating the relevance and success of the project's message.

### Reference:

Tim Goodridge  
 (Former Executive Director, EBURD)  
 MetraPark  
 406.256.2400

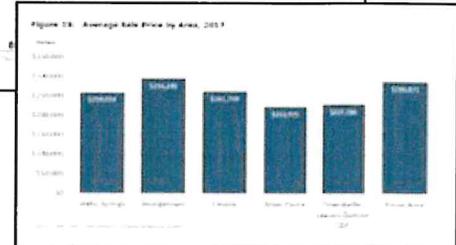
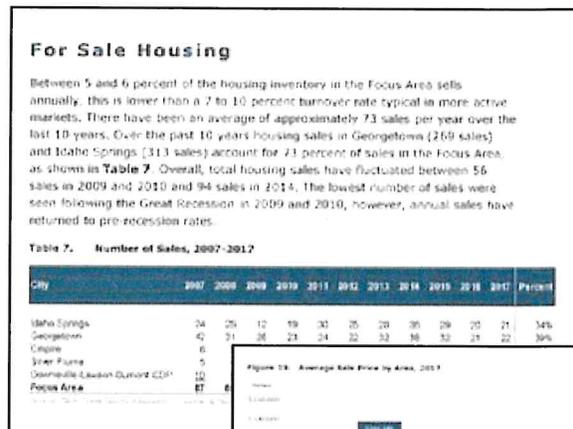


## Clear Creek Housing Study

This study was prepared by Economic & Planning Systems (EPS) as lead consultant and Sanderson Stewart as a subconsultant for Clear Creek County, Colorado. The purpose was to assist the County and municipal governments in developing strategies to improve and expand housing to support the labor force and improve quality of life of current and future residents. The report:

- Determined the types of housing needed for the labor force
- Recommended housing types to prioritize for development
- Recommended housing policies, strategies, and actions to implement to expand and improve workforce housing conditions

Sanderson Stewart provided a site specific concept design for a parcel of County owned land that was used to test project feasibility based on market conditions and needs as identified in the report. This work incorporated an understanding of needed housing types and amenities and positioning of the development in the market.



### Reference:

Lisa Leben  
 Special Projects Division  
 Clear Creek County, Colorado  
 303.679.2434  
 lleben@clearcreekcounty.us

## Residential Development Projects & Feasibility Studies

Sanderson Stewart works with residential developments at all phases of the development process. From feasibility to move in, we are involved in all aspects of residential development. Our understanding of residential development is essential in provide a Housing Study that provides an accurate snapshot of the market and strategies to develop and preserve housing in Anaconda. A sample of residential projects include:

- **Development Feasibility Study - Greeley, Colorado:** Sanderson Stewart aided a client who was exploring several permutations of multifamily development on multiple lots in Greeley, Colorado. Sanderson Stewart provided development concepts and supported the selection and research of market data to inform the unit type mix.
- **Shiloh Commons Apartments – Billings, Montana:** Located in the west end of Billings adjacent to the MSU-Billings City College campus, Shiloh Commons is positioning itself to be “Montana’s Premiere Lifestyle Campus”. At 9.37 acres in size, Shiloh Commons is a mixed-use development consisting of 144 upscale apartments spread amongst four, five-story garden style apartment buildings combined with 60,000 square feet of office and restaurant space. Additionally, a 6,300 square-foot retail building includes a drive-thru. Underground parking, rooftop terraces, and outdoor space make Shiloh Commons an attractive community for renters looking for a one-stop live-work community.



- **Starner Gardens – Billings, Montana:**  
Starner Gardens is an affordable senior residential community. With apartments and cottages, the community offers a variety of options at affordable rates.



- **Annafeld Subdivision – Billings, Montana:**  
Annafeld is a unique vision for the land that both honors the past and looks forward to meet the demands of the growth of Billings and Yellowstone County. Situated near the beautiful and wild Yellowstone River, Annafeld brings new life into the area, offering residents scenic views, abounding outdoor recreational opportunities, and eventually, a central plaza offering mixed use retail/office and apartment spaces. The community offers single and multi-family residences, parks, trails, and myriad opportunities to meet neighbors and new friends.

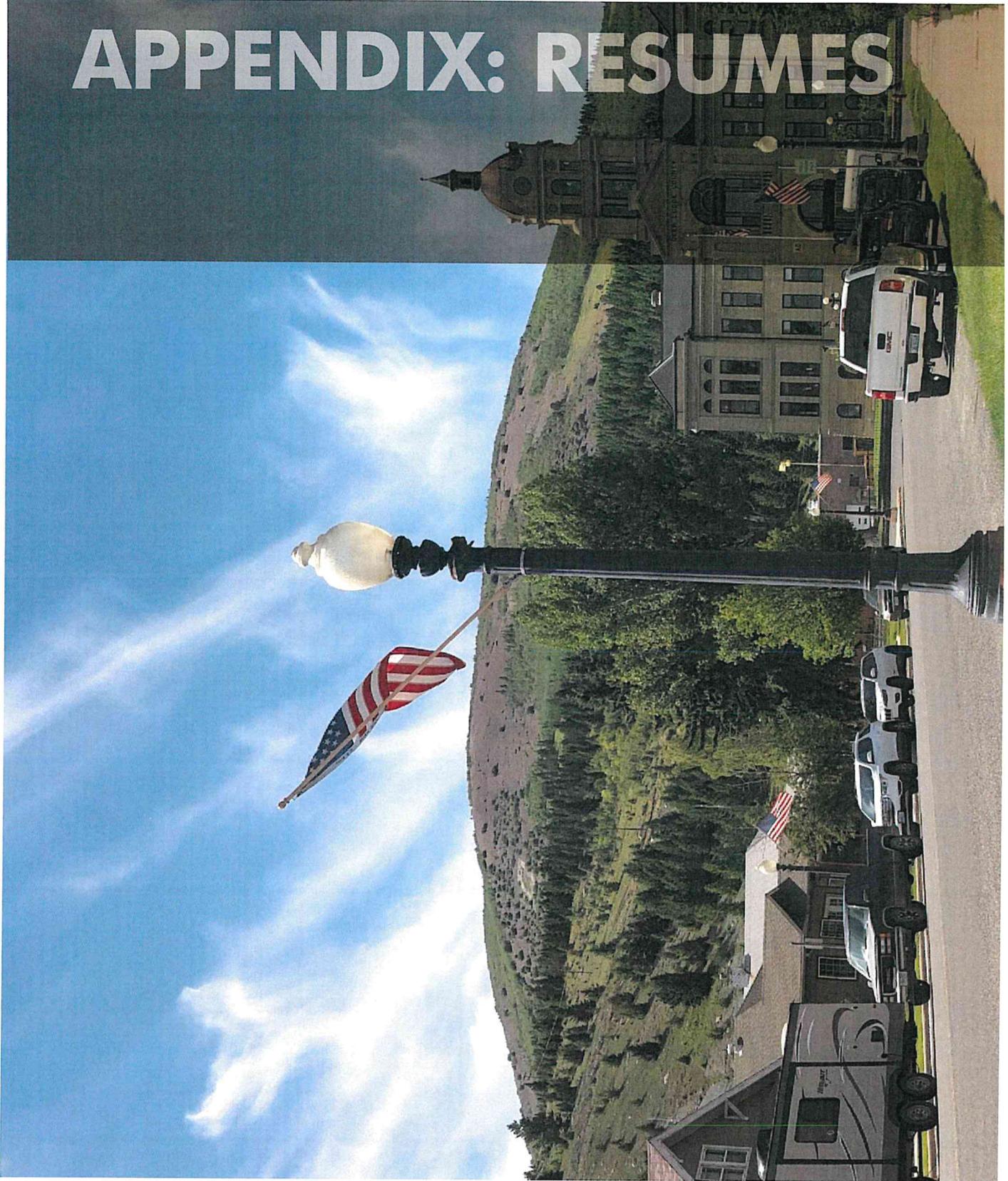
- **Meadowlark Ranch Subdivision, Belgrade, Montana:** Meadowlark Ranch is a neighborhood in Belgrade that provide opportunities for first time home buyers. With small lots and plenty of open space, there’s lots of variety of floor plans available for residents. The subdivision has been designed to take advantage of views, while minimizing infrastructure costs in order to remain affordable in Gallatin County’s busy home market.



- **Annual Data Report - Loveland Colorado:**  
While in the long range planning division at the City of Loveland, Karl was responsible for creating the City’s Annual Data Report. This report included projections of the City’s population, demographics, and housing units. As well as analysis of the area’s economy.



# APPENDIX: RESUMES





p 1-406-869-3303  
 mfogelsong@sandersonstewart.com  
 www.sandersonstewart.com

## MAC FOGELSONG, PE

Mac is a Principal, Vice President, COO and Municipal Group Market Leader overseeing mid-size to large engineering design, planning, and construction projects and associated design staff. These projects include a variety of residential developments for private clients as well as municipal projects for public clients. Mac's project experience is diverse, including single and multi-family residential development feasibility analysis and design, municipal water and sewer replacement, hydraulic and hydrologic analysis, stormwater mitigation, geotechnical design, street design, and construction management.

Mac is an expert in the residential development process, working with owners and regulatory agencies from the feasibility analysis stage through platting, design, permitting, and construction.



### EDUCATION

Montana State University, Bozeman  
 M.S., Geotechnical Engineering, 1998  
 B.S., Civil Engineering, 1996

### PROFESSIONAL REGISTRATION

Professional Engineer, Montana  
 #12877 PE  
 Licensed Nuclear Densometer Operator  
 Certified Water & Wastewater Operator

### PROFESSIONAL & CIVIC AFFILIATIONS

Big Sky Economic Development Board Member,  
 2017-present  
 American Council of Engineering Companies of Montana  
 (ACEC)  
 Treasurer 2006-2007  
 President 2010-2011  
 Director 2013-2014  
 Chi Epsilon, National Civil Engineering Honor Society

### PUBLICATIONS & PRESENTATIONS

*"Geosynthetic Reinforcement of Flexible Pavements on a Soft Subgrade"* (with S. Perkins and M. Ismeik), Geosynthetics '99, Boston, MA, 1999  
*"The Influence of Geogrid Cyclic Properties on the Reinforcement of Flexible Pavements,"* (with S. Perkins and M. Ismeik), Transportation Research Board, National Research Council, 1998  
*"Mechanical Response of a Geosynthetic-Reinforced Pavement System to Cyclic Loading,"* (with S. Perkins and M. Ismeik), Fifth Intl. Conference on the Bearing Capacity of Roads and Airfields, Trondheim, Norway, 1998

### EXPERIENCE

*Principal-in-Charge/Project Manager: duties include project visioning, planning and design; resource allocation; client communications; and team leadership.*

- Starner Gardens Affordable Senior Housing, Billings, Montana
- Meadowlark Ranch Subdivision Platting, Design, Permitting, & Construction Administration (CA), Belgrade
- Ironwood Estates Subdivision Platting, Design, Permitting, and CA, Billings
- Copper Ridge Subdivision Platting, Design, Permitting, & CA, Billings
- High Sierra Subdivision Platting, Design, Permitting, & CA, Billings
- Falcon Ridge Subdivision Platting, Design, Permitting, & CA, Billings
- Twin Oaks Subdivision Platting, Design, and CA, Billings
- Diamond C Links Subdivision Design, Red Lodge
- Sierra Estates Subdivision Design & CA, Billings
- West Meadows Subdivision, Phases I-III Design & CA, Yellowstone County
- City of Billings, W.O. 19-01 Schedule 1 - 1st Avenue North Water Main Replacement, Billings, Montana
- Five Mile Road & Bridge - Common Boundary & 2-Lot Minor Plat, Yellowstone County, Montana
- RSID 717, Oxbow Subdivision, Yellowstone County, Montana



p 1-406-922-4313  
 lwaterton@sandersonstewart.com  
 www.sandersonstewart.com



## LAUREN WATERTON, AICP

Lauren brings over 25 years of experience in planning, development and design, in both the public and private sector. Her work focuses on connecting the strategies and planning tools needed to address the unique conditions of small and rural communities. She has a diverse background in urban planning and design with experience in master planning, site analysis, downtown plans, design review, and resort management.

As the manager of the Placemaking Studio, Lauren works to bridge engineering, landscape architecture and planning disciplines to create plans and environments that support communities and enhance the lives of residents. She combines an understanding of the planning process and a commitment to helping clients discover and implement new ideas to create unique communities.

### EDUCATION

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

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

### PROFESSIONAL REGISTRATION

American Institute of Certified Planners, 1997

### PROFESSIONAL & CIVIC AFFILIATIONS

American Planning Association, Planners' Advocacy Network

Montana Association of Planners

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

Bozeman Planning Board, 2016-2020

Planning Coordinating Committee, 2016-2020

Leadership Bozeman, 2013-2014

### HONORS & AWARDS

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

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

### PROFESSIONAL TRAINING

Greater Yellowstone Framework for Sustainable  
 Development, Yellowstone Business Partnership  
 2009

Historical and Architectural Survey Workshop, Colorado  
 Historical Society, 2004

### EXPERIENCE

*Project Manager: duties include project visioning, planning and design; resource allocation; client communications; and team leadership.*

- Anaconda Downtown Master Plan, Anaconda, Montana
- EBURD Downtown Billings Housing Strategy, Billings, Montana
- Gallatin County Triangle Planning Study, Gallatin County, Montana
- City of Dillon Growth Policy Update & Downtown Master Plan, Dillon, Montana
- City of Glendive Downtown Master Plan, Glendive, Montana
- City of Laurel Gateway Strategic Plan, Laurel, Montana
- Spanish Peaks Resort Planned Unit Development, Multiple Phases and Renewal, Big Sky, Montana
- Lockwood Targeted Economic Development District, Yellowstone County, Montana
- Tri-Township Comprehensive Plan, McKenzie County, North Dakota

*Project Planner: duties include leading community and land planning through task management, public outreach, document preparation, and overall project oversight.*

- Gallatin County Growth Policy Update, Gallatin County, Montana
- Sanders County Capital Improvement Plan, Sanders County, Montana
- Bozeman Economic & Demographic Analysis (subconsultant to Economic & Planning Systems), Bozeman, Montana



p 1-303-263-4370  
 kbarton@sandersonstewart.com  
 www.sandersonstewart.com



## KARL BARTON, AICP

Karl joined the firm as Senior Planner in the Placemaking Studio. He brings a well rounded perspective with expertise in planning, design, and development feasibility and analysis. Since 2007, he has worked as an urban planner, leading projects such as comprehensive, corridor and transportation plans, entitlement project management, creating development code and design guidelines for downtowns, he managed and crafted the “Create Loveland” Comprehensive Plan; Karl oversaw the drafting, scope, schedule, budget, and subconsultant coordination for the comprehensive plan.

While with the City of Loveland, Karl was responsible for creating and presenting the annual data report that included projections of the City’s population, demographics, and housing units. Karl has performed financial and fiscal analyses for infrastructure and residential development feasibility and has spoken on the use of metrics and indicators in comprehensive plans to measure progress towards community goals and how to include considerations of the impacts on public health of how a city is planned, designed, built, and operated. He also guest lectured on urban planning, the entitlement process, and emerging topics in city building at the University of Denver.

### EDUCATION

University of Denver, Denver  
 M.S., Real Estate Development and Finance, 2017

University of Colorado, Denver  
 Masters of Urban Design, 2006  
 Masters of Urban and Regional Planning, 2006

University of Colorado, Boulder  
 B.A., Economics, 2004  
 B.S., Business Administration, 2004

### PROFESSIONAL REGISTRATION

American Institute of Certified Planners (AICP)

### PROFESSIONAL & CIVIC AFFILIATIONS

Beta Gamma Sigma Business Honor Society, member

Tau Sigma Delta Architectural Honor Society, member

Urban Land Institute, member

### PUBLICATIONS & PRESENTATIONS

Guest Lecturer at University of Denver Daniels College of Business, Land use planning and development topics

Guest Panelist, American Planning Association Colorado Chapter, “How Health Happened: Envisioning Public Health in Comprehensive Plans: Stories from Loveland, Longmont, Arvada and beyond!”, 2017

Various presentations on topics including: “The Use of Indicators & Metrics in Comprehensive Plans”, “Integrating Public Health & the Built Environment”, and “The Impact of Codes and Zoning on Infill Development”

### HONORS & AWARDS

Merit Award: Innovative Partnerships & Collaborations, “Create Loveland” comprehensive plan team, APA Colorado Chapter, 2017

Outstanding Graduate in Urban Design Award, University of Colorado at Denver, 2006

### EXPERIENCE

*Senior Planner: duties include project visioning, planning and design; resource allocation; client communications; and team leadership.*

- EBURD Downtown Billings Housing Study & Site Feasibility, Billings, Montana
- Multi-family Development Feasibility Study, Greeley, Colorado
- Concept site planning and cost estimates for affordable housing feasibility studies, Clear Creek County, Colorado
- Southeast Colorado Enterprise Development Opportunity Zone Prospectus, Southwest Colorado
- Frontage Road Multi-Modal Plan, Belgrade to Bozeman BUILD Grant Application
- Annual population, demographic, economic and housing forecasts and projections, Loveland, Colorado
- Lockwood Targeted Economic Development District Yellowstone County
- Bonding capacity analysis for public infrastructure, Madison and Gallatin Counties, Montana
- Spanish Peaks binding capacity analysis including housing construction forecast, Big Sky Montana
- “Create Loveland” Comprehensive Plan Creation and Management, Loveland, Colorado



p 1-406-922-4304  
 tgaddo@sandersonstewart.com  
 www.sandersonstewart.com

**TONY GADDO, PE, REALTOR®**

Tony joined the firm in 2018 as a Senior Transportation Engineer and Right-of-Way Specialist. He brings over 15 years' worth of experience with a focus in project management, right-of-way (R/W) acquisition, roadway and transportation design, R/W design, title research/clearing, eminent domain support, property acquisition and valuations, realty market research, negotiations and public involvement. Along with direct acquisition tasks, Tony has experience developing R/W planning reports, property impact analysis, property condition assessments, realty project cost estimates, relocation planning studies and cost estimates.



Tony currently serves as the City of Bozeman's R/W acquisition consultant for its road and utility projects. He's worked on large and small acquisition projects for the local municipality and school district, MDT, and FHWA-Western Federal Lands.

**EDUCATION**

Montana State University, Bozeman  
 B.S., Construction Engineering, 2005

**PROFESSIONAL REGISTRATION**

Professional Engineer, Montana #18169 PE  
 Real Estate Sales Person, Montana #46467  
 Notary Public, Montana

**PROFESSIONAL & CIVIC AFFILIATIONS**

City of Bozeman Pedestrian and Traffic Committee  
 International Right-of-Way Association Chapter 45  
 Gallatin Valley Association of Realtors

**PROFESSIONAL TRAINING**

Dual Agency Relationships Montana Water Rights (DNRC)  
 Residential and Business Relocation Workshop  
 Negotiations Workshop: Success in Right-of-Way  
 MDT Right-of-Way Training  
 NDDOT R/W Negotiations  
 Real Estate Contract Law  
 Real Estate Sales Person Rookie Course  
 "Successful Acquisition Under the Uniform Act"  
 "Designing and Implementing Roundabouts"  
 MDT Microstation and GEOPAK Training

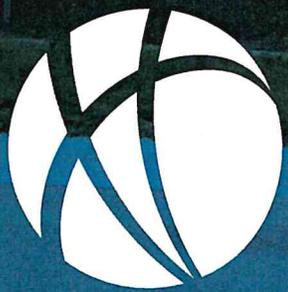
**EXPERIENCE**

*Senior Transportation Engineer/Right-of-Way Specialist: project management and coordination of right-of-way design, title work, property valuations/acquisitions, negotiations and public involvement.*

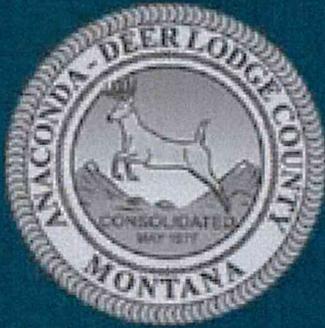
- City of Bozeman Right of Way (R/W) Acquisition Term Contract, Bozeman, Montana
- City of Bozeman Land Agent Services for Babcock to Fowler, Bozeman, Montana
- City of Bozeman T.O. #4 - Norton Sewer/Davis Lift Station, Bozeman, Montana
- City of Bozeman T.O. #1 Baxter & Cottonwood R/W Acquisition, Bozeman, Montana
- City of Bozeman T.O. No. 2 - Condemnation Support Services, Bozeman, Montana
- City of Bozeman T.O. No. 3 - Cottonwood R/W Acquisition Services for Cottonwood Road from Babcock Street to Durston Road, Bozeman, Montana
- City of Bozeman T.O. No. 5 - Oak Springs Storm Pond R/W, Bozeman, Montana
- City of Bozeman T.O. No. 6 - Oak & 27th R/W, Bozeman, Montana
- City of Bozeman T.O. No. 7 - Davis/Norton R/W, Bozeman, Montana
- Oak & 27th Intersection Improvements, Bozeman, Montana
- MDT Highway 212 Red Lodge to Roberts, Roberts, Montana
- Midtown Urban Renewal District Term Contract, Bozeman, Montana
- Highland and Ellis Traffic Signal, Bozeman, Montana



# SANDERSON STEWART



PROPOSAL



# Housing Market Analysis & Study

Prepared for:

**Anaconda-Deer Lodge County**

Prepared by:



in collaboration with

**Cushing  
Terrell.**

August 6, 2020

EPS #203104





August 6, 2020

Anadonda-Deer Lodge County Chief Executive's Office  
Adam Vauthier, Project Manager  
800 Main Street  
Anaconda, MT 59711

**Subject: Housing Market Analysis and Study; EPS #203104**

Dear Adam:

Economic & Planning Systems (EPS) is pleased to submit a proposal to complete a housing needs assessment for the Anaconda-Deer Lodge community. Founded in 1983, EPS is a full-service real estate consulting firm with a broad-based practice in regional economics, housing policy, and land use issues. We have 48 professional staff in our Denver, Los Angeles, Oakland, and Sacramento offices.

EPS has well developed practices in housing needs assessments and development strategies, economic development, and public-private partnerships. We will staff this project with experienced people from our Denver, Colorado office who have work in Montana and in rural western mountain and mining communities and understand the challenges and opportunities the community faces.

**Consultant Team**

EPS will lead this effort with support from Cushing Terrell's Bozeman office. Cushing Terrell is also submitting a proposal for the Historic Preservation Plan, with which this Housing study needs to coordinate. We believe having a team member close by in Montana will help with ensuring we understand the local context and in meeting with stakeholders.

EPS's key staff are David Schwartz, Principal, and Brian Duffany, Executive V.P. Brian will be the project manager and day-to-day contact. He brings extensive experience on housing and economic development in Colorado and Montana, especially in small communities. David is a national housing policy expert and will bring his knowledge and experience with local housing policies, tools, and strategies to the assignment.

Nicole Olmstead is a Community Planner with Cushing Terrell, based in Bozeman. Nicole has experience in local government and as a consultant on zoning, land use, and regulatory issues as well

EPS Denver  
730 17th Street  
Suite 630  
Denver, CO 80202

Oakland  
Sacramento  
Los Angeles  
epsys.com

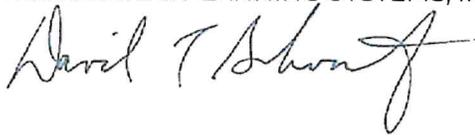
as facilitating community and stakeholder processes. Nicole will support the team with stakeholder and focus group facilitation, housing and neighborhood assessments, and in evaluating land use and zoning policies.

EPS was not able to identify a low income or disadvantaged business to partner with for this project. EPS reviewed the State of Montana DBE/SBE Directory; no DBE or SBE businesses were listed in Anaconda-Deer Lodge County. We are willing to work with you to find a solution if this is an issue with our proposal.

We appreciate the opportunity to propose on this important assignment. If you have any questions or need additional information, please contact Brian directly at (720) 460-3302 or [bduffany@epsdenver.com](mailto:bduffany@epsdenver.com).

Sincerely,

ECONOMIC & PLANNING SYSTEMS, INC.



David T. Schwartz  
Principal



Brian Duffany  
Executive Vice President

# Proposal

## Understanding and Approach

Anaconda-Deer Lodge is at an exciting crossroads. Long plagued by the shutdown of the ARCO copper mine and superfund site stigma, the community has reached a settlement agreement. Clean up activities will ramp up again, and the community will receive \$30 million for economic development over the next 25 years. A new hotel-convention center has been announced which will help catalyze the transition and diversification of the region's economy. Economic and community developers are recognizing the potential for growth and are concerned that housing is a constraint that needs to be addressed. The superfund remediation activities may also bring new jobs and workers which will need to be housed either semi-permanently or in short term lodging accommodations.

Amenity and scenic-rich communities such as Anaconda Deer Lodge have a track record for creating economic and housing market factors that need to be balanced. On one hand, the quality of life and identity of these places can attract entrepreneurs which relates to a place-based economic development strategy: investing in quality of life and supporting business startups. On the other hand, they become attractive to second home buyers which drives up housing costs. The mining heritage is also a strong community identity that needs to be recognized, potentially leveraged as a brand, but balanced with economic diversification efforts. EPS has worked in mining communities and has seen how the economic uncertainty has resulted in a lack of investment in housing.

This assignment needs to make a case for the importance of housing, demonstrate a market, and equip the community with tools and strategies to improve housing. Ideally, the private market can be attracted to Anaconda-Deer Lodge to both rehab existing housing and build new housing that supports its economic development objectives. EPS's work plan will address private market housing, as well as areas where government and/or non-profits may have a role in addressing below market rate housing.

### **Task 1: Needs Assessment**

This task documents and analyzes the basic housing needs factors including demographic, supply, and demand factors for Anaconda-Deer Lodge. These analyses establish a baseline understanding of the housing market to be refined and expanded upon in the subsequent tasks.

#### ***Task 1.1 – Housing Demand Indicators***

EPS will prepare a concise economic and demographic analysis of Anaconda-Deer Lodge, focusing on housing affordability and housing demand metrics, and

economic and wage conditions. Key variables are anticipated to include those listed below. Data sources will include the American Community Survey, Montana Department of Commerce, and State and Federal sources of employment and wage and income data (BLS and BEA).

#### ***Employment and Economic Base***

- Total employment by industry
- Job trends, including seasonality, by industry and wage level
- Unemployment rate
- Wages by industry and occupation
- Wage trends (average and by industry) compared to housing costs
- Economic development conditions including prospective employers, and existing major employers and their expansion or contraction plans.

#### ***Demographics***

- Population and household change
- Components of population change (e.g., migration, natural increase)
- Household characteristics (types and size)
- Renters and owners (tenure)
- Household income by AMI category; percentage of households by AMI category
- Housing stock characteristics (e.g. age, vacancy, vacancy for seasonal use)
- Commuting estimates from the Longitudinal Employer-Household Dynamics data series published by the U.S. Census and Bureau of Labor Statistics

#### ***Task 1.2 – Housing Supply Indicators***

This task will provide an analysis of the Anaconda-Deer Lodge housing market, including the rental, for-sale, and income restricted market segments. It will inform the housing gap analysis, and the analysis of policies and strategies.

#### ***For Sale Housing***

- Obtain a database of home sales or detailed reports from the Multiple Listing Service (MLS) through a study partner in the real estate industry. The budget assumes that data will be available in a properly formatted electronic format (Microsoft Excel-compatible); data cleaning or verification is not included in this scope of work.
- Analyze trends in prices by area of the County, age of home (new vs. resale).
- Present home price data in absolute terms (sale price) and in terms of affordability at different levels of area median income (AMI).

### *Rental Housing*

Data on the rental housing market will need to come from a variety of sources, as the availability of published data may be limited. A cost-effective approach is outlined below:

- Review and summarize classified ads (e.g. newspapers, Craigslist) for rental property listings over a period of time during the study to gather a sample.
- Interview major property owners or long term rental managers who are willing to participate in the study.
- Tabulate and analyze American Community Survey (Census) data on rents.

### *Gap Analysis*

- We will summarize housing and demographic data to illustrate the gap between income levels and home prices and rents. This analysis will be used to inform the analysis of policy and organization options available to Anaconda-Deer Lodge to address these needs (e.g. which types of housing and which population segments to prioritize).

### ***Task 1.3 – Second Homes***

Communities in the Intermountain West have been experiencing the market and affordability impacts of second homes for decades. The appeal of these areas with high natural amenities and scenic beauty has spread from the mountain and ski resort communities to lesser known rural communities. It will be important to understand the strength of the second home/part time resident market and its impact on local housing costs and availability. Second home buyers are typically higher income than locals and essentially set the market price for housing.

Using the real estate and MLS data in combination with the demographic analysis, we will estimate the percentage of the market that is absorbed by second home buyers, and the price differentials between local full-time residents and second homeowners. This information influences the regulatory tools and strategies that Anaconda-Deer Lodge will need to consider.

### ***Task 1.4 – Condition and Neighborhood Assessment***

Cushing Terrell staff will travel to Anaconda-Deer Lodge to perform a visual and photographic assessment of the housing inventory to gauge quality/condition and housing styles. The assessment and tour will focus on defining neighborhoods and natural market areas where most housing exists today and is likely to be built in the future. Potential land and "opportunity sites" for future development, as identified by the Client and Consultant Team, will be documented as well.

For budget efficiencies, this work may be conducted in conjunction with Task 2 if on-site in-person meetings are possible under COVID-19 travel and meeting restrictions at that time.

### **Task 2: Issue Identification**

After documenting the baseline supply and demand conditions, the Team will facilitate a combination of 2 to 3 focus group sessions, as well as individual stakeholder and local real estate expert interviews. We will endeavor to have a team member from Cushing Terrell on-site for these. However, due to COVID-19 restrictions we may need to be flexible in have a client representative present to assist with facilitation, with the consulting team members present by telephone or video conference.

- **Focus Groups** – Two to three focus group (approximately 2 hours each) discussions are proposed. The format would include a brief presentation of the Task 1 analysis with time for questions and answers. We would then move the group through a series of questions structured to gain input and understanding on the most pressing housing issues as well as market opportunities for the private sector.
- **Local Expert Interviews** – Our experience has taught us that incorporating local insight in combination with the data and quantitative information tremendously enhances the depth in understanding of the local market. We will interview 4 to 6 local realtors, builders, and developers for their input on the market opportunities and constraints in Anaconda-Deer Lodge. We will also gain input on the amenity mix that can be marketed, and community and economic development topics that need to be addressed in conjunction with attracting and expanding housing development.

The outcome of these interviews and meetings will be clarification and prioritization of the housing issues, needs, and opportunities. They will also inform the Team's direction on further research/analysis and on the strategies and tools to consider.

### **Task 3: Market Analysis**

In Task 3, we begin transitioning from analysis and understanding to strategy, building on the work in Tasks 1 and 2. Here, we will put more definition around the target market segments in Anaconda-Deer Lodge and begin strategizing on how to attract or incentivize private investment.

#### ***Task 3.1 – Market Segments***

This task “builds a case” for housing investment. First, we will define the target market segments:

- **Demand indicators** – Identify and summarize the key demand indicators in a way that conveys that there is a market for investment in Anaconda-Deer Lodge. This includes incorporating material on the resolution of Superfund, remediation, and liability issues.
- **Market rate housing** – Recommend price points, unit types, and approximate sizes for rental and for-sale housing. Ultimately, every community should have the private market build the vast majority of its housing.
- **Workforce housing** – Define the role and need for workforce housing in the community. This may be market rate but attainable housing for a portion of the market, and below market rate for another portion.
- **Affordable housing** – Identify the AMI ranges that can be addressed with private market investment and programs such as low income tax credits, historic tax credits, and USDA Rural Development programs.
- **Senior housing** – Address senior housing needs within each market segment.

#### **Task 3.2 – Market Area Requirements**

This task bridges between the areas of housing and community and economic development as they are interdependent. We will combine our understanding of real estate development, the targeted price-points and unit types, and the local expert and focus group interviews to inform our recommendations.

- Identify the location types or contexts appropriate for each market segment.
- Note existing amenities that can be marketed for attracting private investment.
- Determine gaps in neighborhood, downtown, infrastructure and overall community development amenities that constrain the housing market.

#### **Task 4: Housing Toolkit**

In this task, we will collaborate with the Client and key stakeholders on developing strategies and tools to meet the market demand. Cushing Terrell will help ensure that the recommended tools are possible under Montana law. Practical and political considerations will also be important, and input from the Client team will be sought and incorporated. Cushing Terrell will also support us in integrating this work with the Historic Preservation Plan.

- **Land use and zoning policy** – Cushing Terrell and EPS will evaluate alignment or misalignment of housing demand and needs with current zoning and growth policy. Modifications will be recommended as needed.
- **Public-Private Partnerships** – Identify public assets, especially land and/or infrastructure, that can be put into a development agreement at a below market cost to incentivize development.

- **Incentives** – Examine the impact of incentives such as discounted, deferred, or rebated building and development fees for projects that include a public benefit or address a key market segment.
- **LIHTC** – Evaluate Anaconda-Deer Lodge’s competitiveness for attracting low income tax credit allocations in Montana’s process.
- **Opportunity zone** – Part of Anaconda is in an Opportunity Zone. Making the case for housing demand and housing development will help the community market to opportunity zone investors.
- **Historic preservation** – Determine the role of historic preservation including tax credits in preserving existing housing stock. Preserving existing housing is typically less costly than developing new housing.
- **Infill and redevelopment** – Evaluate the role or impact of infill and redevelopment in housing development.
- **Organizational Strategies** – Determine if there is a role for organizations such as a housing authority, community land trust, city/county land bank, urban renewal and TIF, or down payment assistance programs.
- **Developer and builder recruitment** – Identify Montana and Northern Rockies housing developers who may have interest in Anaconda Deer Lodge. Make connections with local economic development and City/County officials.

## Task 5 – Report and Presentation

### *Task 5.1 – Draft and Final Report*

This task includes compiling all of the work into a concise user-friendly report. The report will cover the key findings, supporting data, charts, maps, and explanations from each task. The executive summary will include the recommendations, and a list of priority short (0-3 years) and mid or long-term actions (5+ years).

A draft report will be submitted to the Client for review and comment. Two rounds of revisions are included, with the Client responsible for compiling and reconciling comments from a limited group of City/County staff.

### *Task 5.2 – Presentation*

EPS will also make a presentation of the report’s findings and recommendations to the appropriate body(ies) in Anaconda-Deer Lodge. Due to travel restrictions, we anticipate that this will need to be by video conference, but we will endeavor to have a team member on site.

### Budget and Schedule

The estimated budget by task on a time and materials basis is not to exceed \$45,000. The proposed schedule is shown below and covers 4 ½ month time period. We are open to your input on the schedule and can work with you to meet any specific schedule requirements you may have.

Task	EPS	Cushing Terrell	Total
<b>Billing Rate</b>			
Task 1 - Needs Assessment	\$7,820	\$1,952	\$9,772
Task 2 - Issue Identification	\$3,880	\$1,952	\$5,832
Task 3 - Market Analysis	\$6,680	\$0	\$6,680
Task 4 - Housing Toolkit	\$6,615	\$1,952	\$8,567
Task 5 - Report and Presentation	\$11,990	\$1,464	\$13,454
<b>Totals</b>	<b>\$36,985</b>	<b>\$7,320</b>	<b>\$44,305</b>
Estimated Hours	236	60	296
Average Hourly Billing Rate	\$157	\$122	\$150
<b>Direct Costs</b>			
In-State Travel	\$0	\$495	\$495
Miscellaneous (e.g. data acquisition fees)	\$200	\$0	\$200
<b>Total Direct Costs</b>	<b>\$200</b>	<b>\$495</b>	<b>\$695</b>
<b>Total Project Budget</b>			<b>\$45,000</b>

Source: Economic & Planning Systems

Task	September		October		November		December		January	
	Weeks 1-2	Weeks 3-4								
Client Check-In & Project Management	◆		◆		◆		◆			
Task 1 - Needs Assessment										
Task 2 - Issue Identification			◆							
Task 3 - Market Analysis										
Task 4 - Housing Toolkit										
Task 5 - Report and Presentation							□		◆	◆

- Ongoing Work
- Completed task
- ◆
 Meeting/Workshop/Interviews
- Draft deliverable
- Final deliverable

THIS PAGE INTENTIONALLY LEFT BLANK



303.623.3557

epsys.com

Denver | Los Angeles | Oakland | Sacramento

## About Economic & Planning Systems

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

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

### AREAS OF EXPERTISE

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

### Clients Served

Since 1983 EPS has provided consulting services to hundreds of public- and private-sector clients in Colorado and throughout the United States. Clients include cities, counties, special districts, multi-jurisdictional authorities, property owners, developers, financial institutions, and land use attorneys.

### Staff Capabilities

The professional staff includes specialists in public finance, real estate development, land use and transportation planning, government organization, and computer applications. The firm excels in preparing concise analyses that disclose risks and impacts, support decision making, and provide solutions to real estate development and land use-related problems.



## EPS Relevant Experience

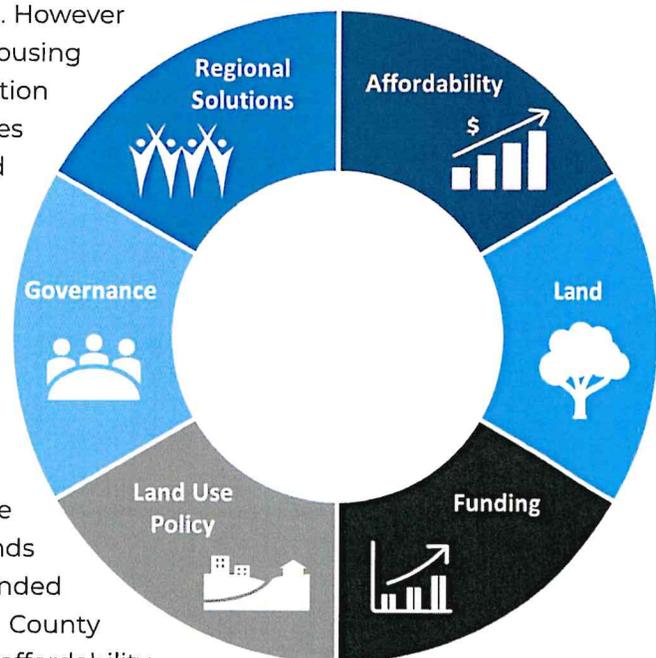
EPS works at the state, regional, and local levels on housing development strategies and needs assessments. A key differentiator is our integration of housing with economic and community development. Our clients are mayors, council members, planning commissioners, city managers, economic development directors, chambers of commerce, city staff, as well as regional authorities or quasi-municipal entities, such as Housing Authorities, Regional Councils of Governments, or Transportation Districts and Boards. Our work ranges from mayor/city council education sessions to provide third-party guidance on appropriate use of public resources and/or regulatory structures, land use policy or disposition, and public-private partnerships. This work frequently integrates our understanding of local, regional, and national market and policy forces with rigorous research and analysis.

The following are representative projects of EPS’s work involving the assessment of housing demands, supply, gaps, policy; assessment of market rate, affordable, workforce, and special needs housing; assessment of community housing needs, policy, and plans.

### Lake County Housing Needs Assessment

#### Leadville, Colorado

Lake County has struggled with decline and stagnation since the 1970s when Climax Mine closed. However there has been a shift in the Lake County housing market since 2015. There is price appreciation and new construction now it becomes appealing location for the Summit and Eagle County workforce, and Climax Mine has re-opened. EPS’s Housing Needs Assessment focused on identifying the key housing issues facing the community as well as resources in the County available to address these issues. The analysis documented economic and demographic conditions contributing to housing affordability issues, evaluated the housing market to identify market trends affecting affordability, and recommended strategies and actions for the City and County to pursue to increase the supply and affordability of housing. The recommendations and Action Plan were



a bottom up effort, developed through stakeholder input, focus groups and direct interviews, and community outreach. The resources and strategies available to the community were cataloged, and applicability to Leadville and Lake County was assessed as part of the creation of an action plan to address identified issues and goals. An outcome so far is hiring a housing coordinator to advance the Action Plan.

### Housing Strategy

#### Clear Creek County, Colorado

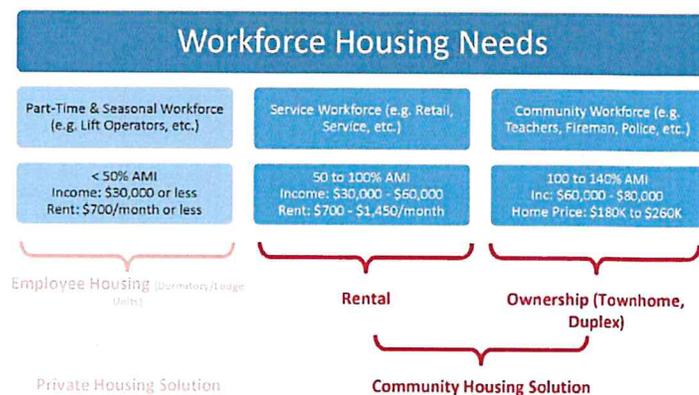
Clear Creek County has suffered economically from the decline in mining and the uncertainty around Henderson Mine closing. The growth of Metro Denver however is benefiting Clear Creek County, except for the traffic impacts of I-70. As a close, lower cost and accessible destination, there has been increased investment in tourism and recreation facilities and growth in business within long-time establishments. There are serious worker shortages that are constraining economic growth and the customer and visitor experience. The lack of growth and incentive for housing re-investment has also created serious substandard housing conditions. EPS was hired to prepare a Needs Assessment and Development Strategy for the County. EPS determined that most housing needs could be addressed with market rate housing, but the challenge was to attract private investment. The recommendations included prioritizing municipal and county land assets for P3s with private developers, supporting non-profit builders active in the County, and continuing their persistence in promoting and marketing infill lots to private developers and non-profits. EPS also prepared a feasibility study for developing a 6-acre County-owned site with workforce housing.

### Housing Policy Strategy

#### Big Sky, Montana

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

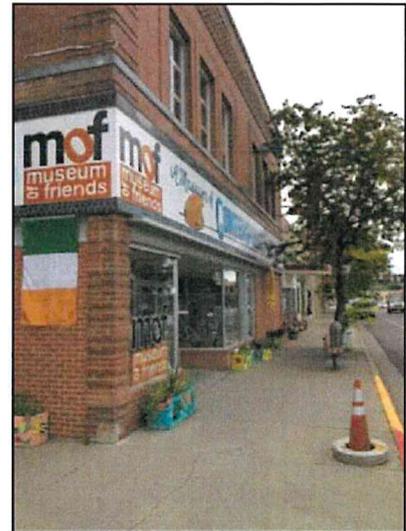
Although positive signs for the economy, these market drivers were placing development pressure on the community that created challenges, and as the visitation and service industries grew, the need for a larger workforce also grew.



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

### **Comprehensive Economic Development Strategy** **Walsenburg, Colorado**

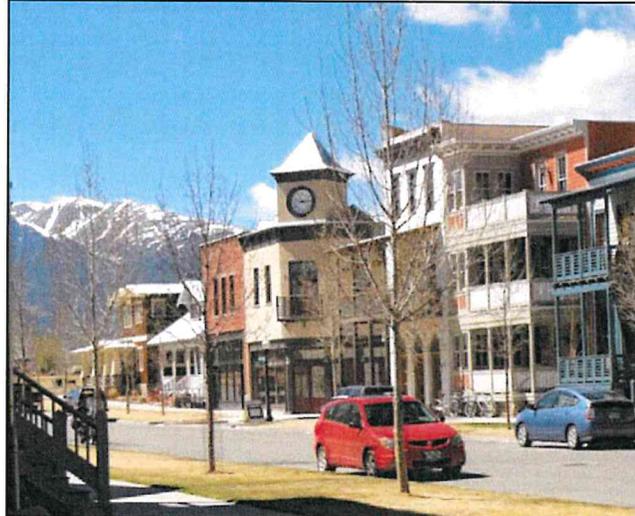
Huerfano County is one of the poorest Counties in Colorado. Historically, coal mining was the largest economic base industry. Following the decline in steel production in Pueblo in the 1950s and 1960s, coal mining declined and the mines closed in the 1970s. Similar to Pueblo and other parts of Southern Colorado, no new industry has emerged to create any significant economic growth. As part of a five year strategic plan, the City identified the need for a Comprehensive Economic Development Strategy (CEDS) to guide and prioritize economic development and to make the City and County eligible for Federal Economic Development Administration grants. EPS prepared the CEDS by preparing an economic base analysis and engaging with business stakeholders to generate ideas on where their markets can be expanded. Several new businesses including Chae Organics (cosmetics), a renovated historic hotel, and a new downtown coffee shop indicate growing interest in private investment from within the County and from outside interests. A key aspect of the study was evaluating the potential for a business park near one of three I-25 interchanges. Other identified opportunities included adapting the former Cucharra Ski Area for summer activities, and integrating the population of wealthy part time residents into the local entrepreneurial community for business mentoring and start up assistance.



## Sonoran Institute Smart Growth in Northern Rockies

### Colorado, Montana, Idaho

The Sonoran Institute contracted with EPS as the lead consultant to understand the degree of potential demand for smart growth housing products in rural western regions, specifically Western Colorado and the Northern Rockies. Smart growth concepts have had good market traction in many progressive communities located throughout the west. However, the recession from 2007 through 2009 and protracted recovery changed the economic and market landscape. The primary objective of this study was



to document the economic and demographic drivers of selected representative communities, link these drivers to housing supply and demand and recent market performance, and provide direction about future needs and trends based on economic forecasting for the representative communities.

Some of the key questions addressed include: identifying what segments of the market gravitate to smart growth products; what degree these segments will grow or contract in the future; and what might cities or towns do, related to policy, planning, and visioning to better position a community to increase the amount of smart growth in the future. EPS's analysis expanded on the body of knowledge regarding smart growth in the western U.S., using national level understanding as a platform for departure. The study integrated primary and secondary data, including a household survey in six communities to formulate a planning and policy document that provides guidance to the Sonoran Institute as it partners with private sector (developers, lenders, brokers, or designers) and public sector (cities or towns, city councils, BoCC members, and appointed officials).

## Downtown Housing Development Strategy

### Billings, Montana

Billings is a City of 112,000 in Eastern Montana with a stable economy and moderate growth. The City and the two Downtown groups which manage the two urban renewal areas with tax increment financing (TIF), the Downtown Billings Associate (DBA) and the East Billings Urban Revitalization District (EBURD) have been investing in Downtown and working to expand and strengthen Downtown businesses. Downtown now has a strong mix of restaurants, microbreweries, and

hotels, but has lost population. There have been several small-scale loft conversions and renovations, but no significant amount of new housing. EPS was hired to prepare a housing development strategy for increasing the amount of Downtown housing.

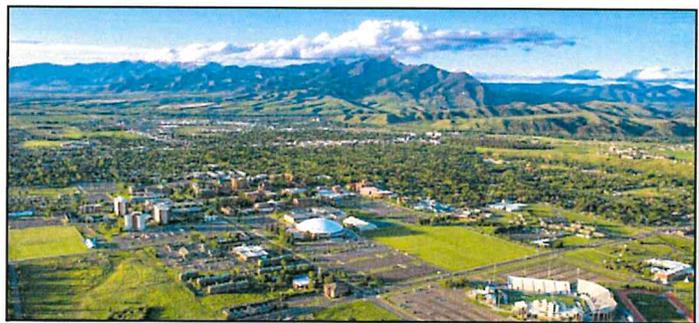


EPS prepared a housing market analysis for downtown and distributed a survey on housing preferences to area employees which received over 700 responses. The market analysis and survey, along with developer and property owner interviews were used to recommend the target market and housing types to pursue. EPS partnered with a land planning and urban design consultant to identify catalyst sites and street corridors to prioritize for housing development. Concept plans and financial pro formas were prepared to illustrate feasibility for modest but quality workforce housing. The feasibility analysis identified only a modest financing gap for the prototypes, and recommended strategies for partnerships and the use of TIF to address the gaps.

### **Growth Policy Update**

#### **Bozeman, Montana**

EPS was retained by the City of Bozeman to provide economic and demographic data analysis and to identify future land use needs over the next 25 years. The purpose of this analysis was to support the City's update of the comprehensive plan and identify what land area and land characteristics are needed for the continued economic and physical growth of the City.



In order to provide staff and the Planning Board with the framework necessary to fully understand the factors that influence growth in the City, EPS provided a comprehensive summary of economic and demographic trends and conditions in and around the City. This information was used to provide the framework and inputs necessary to develop the final land demand forecasts.

EPS developed an employment based land demand model to estimate the total demand for commercial and residential space. Based on anticipated employment growth in Bozeman, EPS estimated the annual demand for varying commercial space types (i.e. office, retail, and industrial) as well as the demand for residential

housing types (i.e. single-family, townhome, and multifamily) over the next 25 years. These estimates were used to provide policy and strategy recommendations to the City after discussions with the City Planning Board and City staff. These recommendations were included in a final report along with an interim and final presentation to the City's Planning Board.

### **Rural Housing Initiative**

#### **Southwest Colorado**

Since 2015, the Telluride Foundation has been working closely with local government representatives in and around San Miguel County to discuss how governments could meet the workforce housing gap. These meetings were supported by analysis completed by EPS that focused on providing clarity related to the need for workforce housing in rural communities. One of the specific strategies outlined focused on public private partnerships (P3) as a tool for local governments to expedite housing projects without large financial subsidies, other than providing free land. However, local governments were hesitant to embrace P3 housing due to the lack of control to outside developers and the need to include free-market units or higher AMI percentages as well as larger density projects in order for the financial model to work. As a result, this effort didn't get off the ground.

In 2018, the Telluride Foundation created a local housing committee in rural Naturita/Nucla to start exploring how these communities might develop affordable housing to support working families and teachers. While these communities were very supportive of starting a housing project, there was not a clear strategy for financing individual projects. As a result, the Foundation funded a housing needs assessment and engaged EPS to create a financial model that highlighted the true financial gap associated with local workforce housing projects. As part of this process, EPS and the Foundation engaged a variety of strategic partners that included the Colorado Health Foundation, DOLA, CHAFA and other partners to create a model for financing workforce housing projects in rural communities throughout Colorado.

EPS continues to work with the Foundation and the strategic partnership in order to help refine this program. In June 2020, the partnership was notified that it was one of 15 organizations (out of initial pool of nearly 900) selected as a finalist to vie for one of six \$2 million grants that will be awarded by the Enterprise Foundation as part of its Housing Affordability Breakthrough Challenge. Additional information relating to the initiative can be found through the following link: <https://housingbreakthrough.org/>

**Chaffee County Housing Strategy**  
**Salida, Buena Vista, and Poncha Springs, Colorado**

When EPS did the first Needs Assessment In the early 2000s, Chaffee County was a relatively undiscovered area of Colorado with housing that was less expensive than other Colorado mountain communities. Housing and demographic conditions changed significantly when EPS prepared a new Housing Strategy in 2016. The focus of this update was on implementation measures and policies. There are also a number of new opportunities for expanding the affordable and attainable housing supply. These include partially developed subdivisions with heavily discounted land as a result of the great recession and the City of Salida's Vandaveer ranch property. EPS created prioritized list of actions, strategies, and policies judged to have the most potential for implementation in Chaffee County. Key recommendations included options for dedicated local funding, supporting a land trust, and forming a regional housing authority if sufficient participation can be brought from each government entity.



**Downtown Whitefish Market Analysis**  
**Whitefish, Montana**

Great Northern Ventures, LLC planned to build the first infill, mixed-use development in downtown Whitefish, Montana that included retail, condominiums, fractional units, and structured parking. The project included several elements new to the local market. The community viewed the project as an important leader that would set the standards for future redevelopment and contribute to the overall vibrancy and success of downtown.

EPS was hired to determine the depth of demand and market segmentation for fractional condominium and high-end, whole-ownership condominium development in Whitefish. The development was the first to market with fractional product, as well as the first to introduce high end construction within the context of the downtown. EPS analyzed the strategies that historical fractional developers used to enter new markets and focused on the emerging resort markets around the country where a limited or fractional development had recently been built. In addition, demand for the high-end, whole-ownership product was analyzed based on historic trends and current market conditions within the market area. EPS presented Great Northern Ventures with a strategy for a product mix, product size, pricing, and absorption that accounted for market segmentation, depth of demand, and revenue potentials for each use.

## **Whitefish Market Evaluation**

### **Whitefish, Montana**

The Aspen Group acquired a 13-acre site in Whitefish, Montana that included river frontage with the goal of targeting the second homeowner with a 158-unit project. Certain areas within the Whitefish region were well established second home destinations, such as Whitefish Lake and Whitefish Mountain Resort. However, the potential to broaden the market to include higher density development within the Town had not been tested.

EPS was retained to provide a market analysis and to advise the developer regarding the depth of market demand, the expected rate of absorption, price points, and overall market support for expanding the types of product that could be marketed to second homeowners. EPS conducted a comprehensive analysis of the Whitefish region to document the rate of sales and the presence of out-of-county purchasers by type of development and location within the region. Using a range of sources that included primary and secondary research, EPS defined past trends and forecasted future market conditions. The client used the analysis to set pricing and evaluation project feasibility for different scenarios that EPS identified in the study.

## **Archuleta County Housing Needs Study**

### **Pagosa Springs and Archuleta County, Colorado**

Archuleta County has experienced strong employment growth since 2013 and has increasingly become a second home destination in southwest Colorado, thus pricing out the local workforce. EPS prepared a Housing Needs Study for Archuleta County that focused on the County's priority of workforce housing. The analysis documented economic and demographic conditions contributing to housing affordability issues, evaluated the housing market to identify market trends affecting affordability, and recommended strategies and actions for the Town and County to pursue to increase the supply of housing for low and moderate income residents and the local workforce. Recommendations were prioritized into short-, medium-, and long-term goals. Key recommendations included utilizing available public land for a new housing development, identifying an organizational structure to be the central voice and advocate for housing in the area, and evaluating policy and financial tools to incentivize private housing development to include affordable units.

## **Upper Arkansas Area Council of Governments Housing Needs Assessment**

### **Custer County, Fremont County, Park County, Colorado**

EPS prepared a Housing Needs Assessment for Custer County, Fremont County, and Park County through the Upper Arkansas Area Council of Governments. The study defined the gap between current housing supply and housing needs, both

regionally and in each community; understanding future trends and providing recommendations to bridge the gap between housing supply and units needed to provide for the local workforce and households unable to compete in the open real estate market; and identifying strategies to guide decision making on removing regulatory barriers, allocating resources, and changing local policies and programs to fill the needs identified in the study. The study is focused on policy and implementation recommendations, based in data analysis, to allow the UAACOG and participating Counties and partners to achieve meaningful progress on affordable and workforce housing.

**Fruita In Motion – Comprehensive Plan**  
**Fruita, Colorado**

Fruita is a City of 14,000 people in Mesa County and the Grand Valley. Fruita is perhaps more well known outside of Colorado as a premier mountain biking destination on par with Moab, UT. While small, Fruita is a complex community with dual roles as a recreation gateway community and also a suburb within the Grand Junction/Mesa County MSA, the largest MSA outside the I-25 Corridor in Colorado. The evolution of the Mesa County economy and return of job and population growth has placed Fruita at a crux in its evolution. Economic diversity, housing affordability, housing choice, and growth pressures are now central issues. EPS was the economic consultant for the new Comprehensive Plan. EPS showed with simple data and analysis how the issues of housing affordability, lack of housing diversity, and growth pressures were affecting Fruita. The analysis resulted in bold recommendations for increasing housing diversity, housing supply, and embracing inclusivity and affordability.



**Housing Affordability Policy Study**  
**Fort Collins, Colorado**

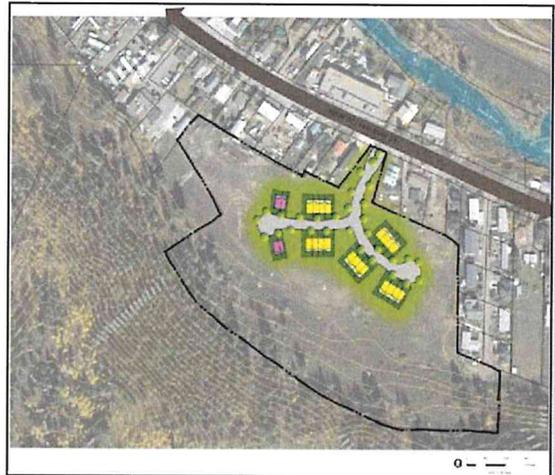
The City engaged EPS to complete a comprehensive housing affordability policy study. EPS identified housing affordability issues and challenges and quantified the housing issues and need, such as trends in commuting and ownership housing costs, changes in affordability gaps, gaps in rental and ownership inventory, legislative barriers (i.e. threat of construction defects claims) to construction of multi-family ownership housing, among others.



Recommendations included quasi-regulatory and non-regulatory solutions, such as the establishment of a public-finance based incentives policy, a reduction in the minimum house size in the building code, granting of development review fee waivers for affordable housing projects, reevaluation of marginal capital expansion and development review fee structure.

### **CDOT Workforce Housing Study** **Eagle County and Summit County, Colorado**

The Colorado Department of Transportation (CDOT) contracted EPS to complete a workforce housing study that evaluated housing strategies for three maintenance facilities in Eagle County and Summit County, Colorado. The study created a master plan for a long-term affordable housing solutions in these submarkets that met CDOT's current and future housing needs and developed a master plan for meeting those needs. EPS prepared market and feasibility analyses for several development sites, and partnered with a design and engineering firm to create concept development plans. Financial pro formas were used to determine costs and revenues and the capital stack needed for development.



### **Workforce Housing Development Impact Study** **Summit County, Colorado**

Under the Obama Administration, the US Forest Service conveyed to Summit County a 45-acre site between Dillon Dam Road and I-70 between Frisco and Dillon. The legislation restricts any development of the site to workforce housing. Summit County Housing intends to be the master developer of the property, and prepared a Master Plan that proposes over 900 units of mixed income housing restricted to the Summit County workforce. The PUD process requires an Impact Study for any project over 150 units, to address impacts on County and municipal services, traffic, public safety, and water and wastewater. EPS lead a team comprised of EPS, transportation, and civil engineers to prepare the impact study. EPS was responsible for the fiscal impact (cost of services) aspects of the Study and for managing the subconsultants and overall study process. The water and wastewater analysis are ongoing, pending completion of related capacity studies by the sanitation district. The goal is to begin development in 2021 or 2022.

## Neighborhood Stabilization Program 2 (NSP2) Technical Assistance

### Aurora, Colorado

EPS was retained by the City of Aurora to research, structure, write, and submit the NSP2 grant request to HUD. As the lead agency completing the grant request, EPS evaluated a wide range of issues. These included community needs related to foreclosures, vacant structures, housing market conditions, household income, unemployment, wages and other factors affecting supply and demand. EPS also evaluated the City's capacity to administer the grant and documented capacity related to real estate acquisitions, rehab construction, marketing, sales, home buyer training, and programs to address Spanish speaking residents, management of wait lists, and ways to address competing buyers. Based on an evaluation of market trends, EPS identified average purchase prices and recommended target sales price points, based on micro-market household income and competitive sales trends. EPS also address program elements such as resale restrictions, down payment assistance programs and participation, and ways to integrate the NSP2 opportunities with existing City programs. A key element in the research was sustainability. EPS identified ways the City could make its NSP2 activities more sustainable, with a specified focus on transit and green construction methods.

EPS presented the research to senior City staff members to develop goals for the program. EPS provided an iterative series of meetings with staff to present increasingly complex research, solicit feed back, and refine the goals and develop the grant application. Building on the research and the City priorities, EPS completed all required elements of the grant application and provided a basis for the \$14.1 million request.

## EPS References

### City of Bozeman

David Fine, Economic Development Specialist  
(406) 551-0209 | [dfine@bozeman.net](mailto:dfine@bozeman.net)

Chris Saunders, AICP, Policy and Planning Manager  
(406) 582-2260 | [csaunders@bozeman.net](mailto:csaunders@bozeman.net)

### Lake County

Sarah Dallas, Director of Administrative Services  
(719) 486-2092 | [admins@leadville-co.gov](mailto:admins@leadville-co.gov)

### City of Fruita

Dan Caris, Planning & Development Director  
(970) 858-0786 | [dcaris@fruita.org](mailto:dcaris@fruita.org)

### Town of Pagosa Springs

James Dickhoff, Planning Director  
(970) 264-4151 | [jdickhoff@pagosasprings.co.gov](mailto:jdickhoff@pagosasprings.co.gov)

### Upper Arkansas Area Council of Governments

Autumn Dever, Regional Housing Director  
(719) 275-9566 | [autumn.dever@uaacog.com](mailto:autumn.dever@uaacog.com)

### Chaffee County

Robert Christiansen, County Manager  
(719) 539-2218 | [bchristiansen@chaffeecounty.org](mailto:bchristiansen@chaffeecounty.org)

### Clear Creek County

Sally S. Rush, Housing Coordinator  
(303) 679-4218 | [srush@co.clear-creek.co.us](mailto:srush@co.clear-creek.co.us)

## OUR STORY

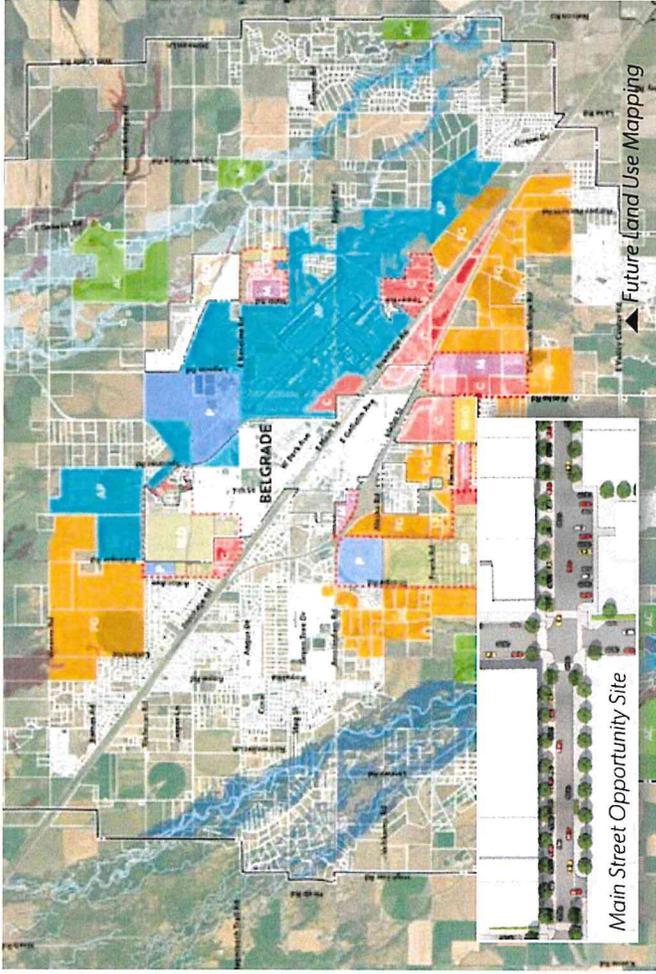
Cushing Terrell is an award-winning, multidisciplinary architecture and engineering firm. Our firm integrates the skills and expertise of more than 20 different technical disciplines into hand-picked teams for any given project.

With multiple disciplines working side-by-side, sharing individual know-how and thriving on the energy inspired by collaboration, Cushing Terrell teams develop progressive designs for a wide range of projects in the Market Sectors that we serve including public and private sectors. A few of our valued private sector clients are Amazon, Apple, Dell and Google. Cushing Terrell has decades of success providing architecture engineering services to the Federal Government including USPS, GSA, USFWS, DoD, USGS and NPS amongst others.

Our roots trace back to founders Ralph Cushing and Everett Terrell, who established Cushing Terrell in 1938 in Billings, Montana. They realized the most effective and efficient approach to provide professional services was to offer both architecture and engineering – a collaborative design and planning approach.

After 82 years, integrated design and client service remain as our core approach to project delivery. As design and engineering systems become more sophisticated, we continue to add specialists to our staff and we have the resources it takes to guide a project from concept to completion. This total service approach reduces management overlap, improves coordination and project delivery, and is key to our higher level of client satisfaction.





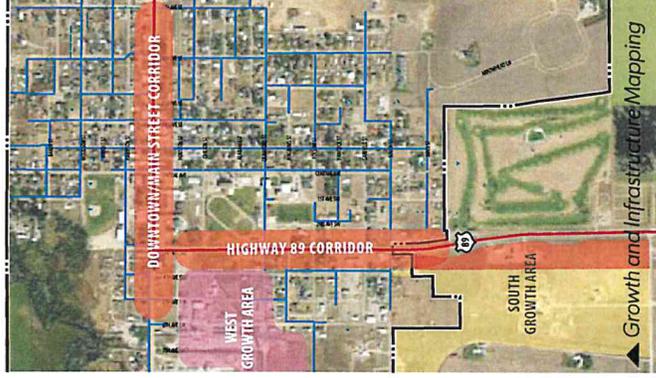
## City of Belgrade | Growth Policy, Code Rewrite, Parks & Rec Master Plan

### BELGRADE, MT

Cushing Terrell recently completed the City of Belgrade, MT's Growth Policy Update and Parks and Recreation Master Plan, providing guidance for land use planning for the city and its 4.5-mile planning area. The plan integrated community input, mapped future land uses, outlined catalyst development opportunities, and generated concept designs to establish the city as a recreation-oriented destination. Our team worked closely with City Planning, Public Works, the Parks and Recreation Board, and the City-County Planning Board to make aspirational recommendations to the City Council and the Gallatin County Commission.

Dozens of landowners in the 4.5-mile jurisdiction were interviewed to add clout to the smart growth policies and Future Land Use Plan. The FLUMs were the first of their kind in the central Gallatin Valley. The plan identified 10 Opportunity Sites which ranged from Main Street parking garages, bike and pedestrian enhancements and a downtown mixed-use district. Cushing Terrell is currently rewriting the city's code to a hybrid form-based code and creating a downtown plan for an urban renewal district. Belgrade is adjacent to Bozeman, MT which has been the nation's fastest growing city of its size for the past three years.

CUSHING TERRELL



## Town of White Sulphur Springs | Growth Policy

### WHITE SULPHUR SPRINGS, MT

The pastoral Town of White Sulphur Springs in central Montana faced great uncertainty and environmental challenges when the first large copper mine in decades applied for a permit just outside of town. Community leaders chose Cushing Terrell to provide a growth policy to manage potential development and mitigate unforeseen impacts.

Located in a favorable central location to heavily-traveled tourist areas, the town was enjoying a rebirth with a popular annual music festival, new breweries and relatively affordable housing. But several years ago it found itself at a pivotal crossroads when a looming hard rock mine and power generation facility threatened the community's lifeblood—the Smith River and its world class fly fishing. Locals raised concerns over degradation of water quality and skyrocketing housing prices, while the aging water and sanitation infrastructure was in need of improvements. Yet the community was not wanting to miss an opportunity to leverage growth to continue its renaissance, and as such steered toward a plan written to locate areas of improvement and areas of potential growth in an effort to seek grant funding to revamp utilities and entice developers to add to the housing stock in time to accommodate any new growth that may occur.







# Brian Duffany

— Executive Vice President —

## Education

Master of Regional Planning, Cornell University

Bachelor of Arts, Colby College

## Employment History

21 Years Experience

16 Years with EPS

## Affiliations

American Planning Association

Urban Land Institute

Colorado Municipal League

**Brian Duffany** is a real estate economist and planner with nearly 20 years of experience in land economics. Brian has a broad base of experience in real estate development feasibility analysis, financial and economic modeling, economic development, economic and demographic analysis, local government finance, fiscal impact analysis, transportation planning. Brian has evaluated proposals and feasibility for development and redevelopment proposals throughout the mountain west and Colorado urban corridor.

## SELECTED PROJECT EXPERIENCE

- **HOUSING STRATEGY | CLEAR CREEK COUNTY, CO**  
Needs Assessment and housing development strategy to address workforce attraction and retention challenges and economic sustainability in mining and tourism communities. Also included a development feasibility study for workforce housing on County-owned land in Dumont.
- **GROWTH POLICY UPDATE, BOZEMAN, MT**  
Comprehensive economic and real estate market analysis to inform the land use and economic aspects of the Comprehensive Plan Update. Addressed supply, demand, and impediments in the office, retail, and industrial markets. Quantified housing affordability conditions and the impact of job relocations and workforce migration from high-cost metro areas on the local housing market.
- **DOWNTOWN HOUSING STRATEGY, BILLINGS MT**  
Market, feasibility, and development opportunity analysis to create a strategy for attracting more housing to Downtown Billings. Conducted interviews, downtown employee survey, and site analysis to recommend priority sites and housing product types. Recommended uses for tax increment financing ranging from direct project incentives to area wide investments.
- **WALSENBURG AND HUERFANO COUNTY CEDS**  
Economic development strategy to address economic diversification, industrial development, tourism enhancement, downtown revitalization, and workforce development issues and opportunities in a former mining community.
- **HOUSING STRATEGY, CHAFFEE COUNTY, CO**  
Worked with a housing task force and stakeholder group to document affordability issues and develop implementation strategies and recommended actions. Stakeholder group included business, real estate, local government, and social services interests.



Economic & Planning Systems, Inc.

*The Economics of Land Use*

[www.epsys.com](http://www.epsys.com)



730 17th Street, Suite 630 Denver, CO 80202



720.460.3302 (direct)



[bduffany@epsdenver.com](mailto:bduffany@epsdenver.com)

Recommendations included creating a local funding source, public-private partnerships, supporting multifamily development, and forming a nonprofit housing organization.

- **TARGETED ECONOMIC DEVELOPMENT DISTRICT FEASIBILITY STUDY | YELLOWSTONE COUNTY, MT**  
Market study, site analysis, and tax increment projections for a proposed TEDD east of Billings, MT.
- **SOUTHEAST COLORADO OPPORTUNITY ZONE PROSPECTUS (ONGOING)**  
Housing market strategy as part of an OZ prospectus to market sites in the 6-County region for workforce housing development.
- **FRUITA IN MOTION, FRUITA, CO**  
Economic consultant to planning team and staff to evaluate issues and recommend policies and strategies on housing affordability, housing diversity, economic development (recruitment, marketing, incentives), and fiscal sustainability.
- **HOUSING NEEDS ASSESSMENT, PAGOSA SPRINGS/ARCHULETA COUNTY, CO**  
Joint Town and County Housing Needs Assessment and Action Plan that addressed the full spectrum of workforce housing needs.

- **HOUSING AND COMMUNITY SUSTAINABILITY STUDY, FLAGSTAFF, AZ**  
Analysis of affordable housing needs, economic linkages between housing and the City's economic base. Developed housing and economic development strategies to promote long-term economic and social sustainability.
- **WORKFORCE HOUSING LAND SWAP IMPACT ANALYSIS, SUMMIT COUNTY, CO**  
Fiscal, economic, and infrastructure impact analysis for the development of the Lake Hill property as workforce housing. Impact analysis supports the County's entitlement process for this property that was purchased from the USFS by Summit County.
- **HOUSING MITIGATION FEE STUDY, PAGOSA SPRINGS, CO**  
Prepared a nexus study and housing linkage fee calculation to support discussions on adopting an affordable housing impact fee to mitigate the impacts of market rate housing and second homes on the Town's affordable housing needs.



# David Schwartz

Principal

## Education

MCRP, The Ohio State University  
B.M., University of Cincinnati  
B.A., Miami University

## Employment History

18 Years Experience  
14 Years with EPS

## Affiliations

American Planning Association  
Denver Association of Business Economists, member since 2007; board (2007-13)  
ULI Housing Taskforce  
Colorado Symphony Sustainability Committee, 2011

## Publications

"The Importance of Affordable Housing to Economic Competitiveness" Economic Development Journal: Vol. 15, No. 1, Winter 2016

## Presentations

*Making Room for the Missing Middle* City Age Conference, Canada

[Shifting the Housing Policy Paradigm](#) National APA Conference New Orleans

Participant to creation of [Strengthen Inclusionary Housing Feasibility Studies](#)

Colorado APA conference [Equity and the Impact of Social Investment on Economic Mobility](#)



Economic & Planning Systems, Inc.  
*The Economics of Land Use*  
www.epsys.com

In addition to providing clients with services related to real estate, infrastructure financing, transportation economics, and land use policy, **David** specializes in housing economics, policy, supply-demand analysis, and economic impact analysis. David works with governmental clients identifying supply-demand imbalances, structuring policy and funding strategies. He applies feasibility analysis and scenario/sensitivity testing in development projects and policy. He also works with government relations clients, economic developers, and trade associations to quantify the impacts of development, industries, transportation systems, and policy.

## SELECTED PROJECT EXPERIENCE

- Housing Strategy Plan, **Big Sky, MT**
- Sonoran Institute Smart Growth Demand in Northern Rockies, **CO, MT, and ID**
- Housing Needs Assessment, **Ouray & San Juan Counties, CO**
- Downtown Whitefish Market Analysis, **Whitefish, MT**
- Whitefish Market Evaluation, **Whitefish, MT**
- Fort Collins IZ and Linkage Study, **Fort Collins, CO**
- Regional Housing Needs Study, **Roaring Fork Valley, CO**
- Housing Needs Update, **Summit County, CO**
- St. Anthony Summit Medical Center Workforce Needs Study, **Frisco, CO**
- Housing Affordability Policy Study, **Fort Collins, CO**
- Housing Needs Assessment, **Lake County, CO**
- Housing Needs Assessment, **Chafee County, CO**
- Demographics and Housing Opportunities Study, **Windsor, CO**
- Upper Arkansas Area Council of Governments Housing Needs Assessment, **Custer County, Fremont County, Park County, Colorado**
- Comprehensive Housing Needs Assessment, **Fort Morgan, CO**
- Housing Policy Study, **Lakewood, CO**
- Inclusionary Housing Rental Policy Update, **Boulder, CO**
- Consolidated Plan and Analysis of Impediments, **Pueblo County, CO**
- Senior Housing Needs Assessment, **Gilpin County, CO**
- Employee Generation Rate Study, **Aspen, CO**
- Economic Impact of Affordable Housing Investment, **Vail, CO**
- Affordable Housing Needs and Policy Analysis, **Basalt, CO**
- Consolidated Plan and Analysis of Impediments, **Aurora, CO**
- Housing Diversity Study, **Denver Regional Council of Governments**
- Affordable Housing Funding and Production Study, **Denver, CO**
- Inclusionary Housing Ordinance Study, **Denver, CO**
- Smart Growth Demand in Northern Rockies, **CO, MT, and ID**
- Housing Policy Review, **Park City, UT**
- planOKC Housing Demand Study, **Oklahoma City, OK**
- Comprehensive Housing Policy Framework, **San Antonio, TX**
- 10-Year Housing Targets Analysis, **San Antonio, TX**
- Housing Trends and Strategic Plan, **Plano, TX**
- Impacts of Supportive Services on Economic Mobility, **Cincinnati, OH**
- Housing Policy Study, **Nashville, TN**
- Affordable Housing Density Bonus Incentive Policy, **Portland, OR**



730 17th Street, Suite 630, Denver, CO 80202



720.460.3305 (direct)



dschwartz@epsdenver.com





# Rachel Shindman, AICP

Senior Associate

Rachel Shindman, AICP, brings several years of experience in many of EPS's practice areas. Her specializations include real estate economics, fiscal and economic impact analysis, and economic development and revitalization. She has a strong skill set for addressing urban economic and policy issues, and her experience in public, private, and non-profit organizations enables her to work successfully with a diverse set of clients.

### Education

Master of Regional Planning,  
Cornell University

B.A., Queen's University

B.Ed., Queen's University

Certificate in GIS, Queen's  
University

### Employment History

7 Years Experience

5 Years with EPS

### Affiliations

American Institute of Certified  
Planners

American Planning Association

Urban Land Institute

### Presentations

*Tiny Homes, Big Ideas:*  
*Alternative Housing,*  
*Conventional Reality* Panel  
Discussion (convener and  
facilitator) American Planning  
Association – Colorado State  
Conference, Keystone, CO 2018

*Can Tiny Homes Help Solve*  
*Denver's Affordable Housing*  
*Crisis?* Panel Discussion  
(moderator) Denver Design  
Week, Denver, CO 2018

*Finding the "Opportunity"*  
*in Opportunity Zones* Panel  
Discussion (convener and  
moderator) American Planning  
Association – Colorado State  
Conference, Snowmass 2019

### SELECTED PROJECT EXPERIENCE

- **HOUSING NEEDS ASSESSMENT | LAKE COUNTY, CO**  
Conducted a housing needs study and action plan for Leadville and Lake County, with a focus on how to match available resources to current and future needs. Work included data analysis to document market and economic conditions and housing need, community and stakeholder outreach, identification of key housing issues, an analysis of opportunities available to the community, and an implementation strategy that includes an action plan with policy, funding, and management/governance recommendations for the City and County to use moving forward.
- **HOUSING NEEDS STUDY | ARCHULETA COUNTY, CO**  
Conducted a housing needs analysis for the Town of Pagosa Springs and Archuleta County, focusing on documenting and analyzing market conditions and local housing needs. This assessment analyzed economic and demographic trends, housing development trends, and affordability indicators. A gap analysis was completed to estimate current and future need by income level, outlining courses of action the County and Town can take to address these needs.
- **HOUSING NEEDS ASSESSMENT | CHAFFEE COUNTY, CO**  
Analyzed the current economic and demographic trends and housing affordability, and projected future need. Outlined implementation measures and policies that can be adopted to expand the affordable and attainable housing supply, and created a prioritized list of actions, strategies, and policies for implementation.
- **HOUSING NEEDS ASSESSMENT | UPPER ARKANSAS AREA COUNCIL OF GOVERNMENTS, CO**  
Conducted a Housing Needs Assessment for Custer, Fremont, and Park Counties through the UAACOG. Analyzed market and demographic data and using focus group and interview feedback to define the current gap between housing supply and housing needs, understand future trends, and provide recommendations and strategies to guide decision making on addressing identified issues and needs both regionally and in each community.



Economic & Planning Systems, Inc.

*The Economics of Land Use*

www.epsys.com



730 17th Street, Suite 630, Denver, CO 80202



303.623.3557



rshindman@epsdenver.com

- **COMPREHENSIVE HOUSING NEEDS ASSESSMENT | FORT MORGAN, CO**  
Currently working with the Fort Morgan Cultures United for Progress Housing Work Committee and the City of Fort Morgan to create a housing action plan that identifies affordable housing gaps and is based on principles of health equity. The study will utilize data analysis, extensive community outreach, and case study research on policies and regulations, to identify tools and mechanisms best suited for the Fort Morgan housing context.
- **PEORIA CROSSING MARKET STUDY AURORA, CO**  
Conducted a market study for the Aurora Housing Authority as part of an application for a competitive LIHTC award for Peoria Crossing, an 82-unit affordable housing development. Analyzed current supply and unmet demand for affordable housing. Completed an update of this project for AHA as part of an application for 4% competitive LIHTC award.
- **HOUSING TRENDS AND STRATEGIC PLAN PLANO, TX**  
Conducted an analysis of housing trends, including demand and supply pressures and the challenges arising from them. Used primary and secondary data, including an advisory group, focus groups, and surveys, that informed a strategic plan for the City to address housing challenges and opportunities.
- **COMPREHENSIVE HOUSING POLICY FRAMEWORK | SAN ANTONIO, TX**  
As lead consultant, EPS laid out overarching issue areas, 11 policy priorities, and 24 action strategies to address problems from workforce housing needs to supportive services to the prevention of displacement and gentrification; the process was guided by a five-member group of mayoral appointees, included extensive data analysis, research, three community meetings, eight public meetings and the creation of five technical working groups.
- **NASHVILLE INCLUSIONARY HOUSING STUDY NASHVILLE, TN**  
Evaluated the feasibility of adopting an inclusionary zoning ordinance and the potential to adopt other types of development or community-based housing policy tools. Documented and analyzed housing and economic supply and demand conditions throughout the city, as well as the current local and state regulatory context.
- **DOWNTOWN WORKFORCE HOUSING NEEDS ASSESSMENT | BILLINGS, MT**  
Conducted a workforce housing needs assessment and development strategy for the Downtown Billings Association and the East Billings Urban Renewal District. Assessment included a market study of the downtown area and a survey of area employees to determine desire and preferences for downtown housing. Development potential and feasibility were addressed, with a strategy for downtown associations to attract appropriate and housing development to the area.



# Sarah Dunmire

Associate

### Education

Masters of Urban and Regional Planning at the University of Colorado Denver

BS in Community, Environment, and Development; Minors in Economics and Communication Arts and Sciences—The Pennsylvania State University, 2015

### Employment History

6 Years Experience  
3 Years with EPS

### Affiliations

APA Colorado Student Chapter

Sarah joined EPS in 2017, bringing her academic and professional experience in planning and economics. Prior to EPS, Sarah worked in the public sector as a Regional Planner gaining experience in regional planning, growth management, and community development. Additionally, through her time as an Economic Analysis Program Assistant for Penn State Extension, Community and Economic Development she learned skills of economic development, strategic planning, and facilitation. She has a passion for community and economic development, affordable housing, and sustainability.

### SELECTED PROJECT EXPERIENCE

- KANE-ELGIN CONSOLIDATED PLAN AND ANALYSIS OF IMPEDIMENTS | KANE COUNTY, IL**  
 Documented economic, demographic, and housing conditions for Kane County, the City of Elgin, and the City of Aurora to complete a Five-Year Consolidated Plan and an Analysis of Impediments to Fair Housing Choice for the Consortium.
- COMPREHENSIVE HOUSING NEEDS ASSESSMENT | FORT MORGAN, CO**  
 Currently working with the Fort Morgan Cultures United for Progress Housing Work Committee and the City of Fort Morgan to create a housing action plan that identifies affordable housing gaps and is based on principles of health equity. The study will utilize data analysis, extensive community outreach, and case study research on policies and regulations, to identify tools and mechanisms best suited for the Fort Morgan housing context.
- SAN MIGUEL COUNTY HOUSING DEMAND ANALYSIS | SAN MIGUEL COUNTY, CO**  
 Provided direction to a consortium of communities within the region, addressing depth of demand for affordable housing by tenure and income level. Identified production targets based on the community profile, the existing housing inventory, and economic projections.
- MARKET ASSESSMENT TOOL FOR HOME-ASSISTED OWNERSHIP | KANE COUNTY, IL**  
 Currently working on the development of a market assessment checklist to be used by the Office of Community Reinvestment staff in the future to establish market need for projects. The tool will summarize supply and demand data along with affordability levels to reflect the market situation.



- **FRUITA IN MOTION | FRUITA, CO**

Economic consultant to planning team and staff to evaluate issues and recommend policies and strategies on housing affordability, housing diversity, economic development (recruitment, marketing, incentives), and fiscal sustainability.

- **SA TOMORROW COMPREHENSIVE PLAN  
SAN ANTONIO, TX**

Completed the economic competitiveness, housing, and growth and city form policy components for the City's comprehensive plan. Developed land use framework for future growth in San Antonio, which is planned around the City's regional activity centers and multi-modal transportation corridors.

- **PEER COMMUNITIES CAPITAL FUNDING  
COMPARISONS | AVON, CO**

Comparison of revenue and expenditure sources and uses in Summit and Eagle County to inform Town Council on fiscal sustainability, options for funding capital projects, and considerations on altering the Town's Real Estate Transfer Assessment to fund workforce housing and/or additional capital needs.



# Nicole Olmstead

## COMMUNITY PLANNER

Nicole brings strong public-sector experience to the team with over 10 years working for state and local governments. Her experience includes facilitating municipal infrastructure projects, compliance assistance, regulatory updates, long range plan development, development review and she is also currently a member of her local Zoning Commission.

As a Community Planner and Project Manager for Cushing Terrell, Nicole has led planning efforts including zoning code updates, wayfinding and design plans and she has created and facilitated public engagement strategies. Nicole is also well versed in entitlement review, completing review packages for projects nationwide. Nicole approaches land use planning with an emphasis on creating plans and policy that are both practical and useful to the communities they are created for.

## Relevant Experience

Explore Great Falls Wayfinding Plan; Great Falls, MT

MT Growth Policy Handbook; MT Department of Commerce Community Development Division, Helena MT

Chaffee County Comprehensive Plan Update; Chaffee County, CO

Belgrade Zoning Code and Downtown Plan, Belgrade, MT

Montana Heritage Center; Helena, MT

Lewistown Public School Master Plan; Lewistown, MT

Zoning Administrative Regulation, Gallatin County, Montana\*

*\*Projects completed prior to joining CTA.*



### Affiliations

American Planning Association (APA), Member  
Montana Association of Planners (MAP), Member  
American Association of Code Enforcement (AACE), Member



### Education

Bachelor of Science in Resource Conservation, University of Montana, Missoula



<https://www.linkedin.com/in/nicoleolmstead-232561101/>

**Cushing  
Terrell**



]

Housing Committee Meeting  
Thursday, August 13, 2020, 10:00 AM  
Community Service Center

Present: Adam Vauthier, Donna Volberding, Steve Hill, Lydia Janosko, Teah Fuller, Jim Davison [via computer].

Purpose of the meeting is to review the submitted proposals. Adam reported on conversations with both companies.

Request for Proposals was reviewed for content

Sanderson Stewart Proposal-Discussion.

Cushing Terrell Proposal – Cost proposal, personnel and task order was submitted with the proposal.

Jim Davison reported that he would prefer that Cushing Terrell to be the main contractor and EPS be the secondary back-up. Jim also thought that some of the data referenced in the proposal does not exist and would need to be gathered. Jim thought that Sanderson Stewart may understand the market better. Housing studies were referenced in the Sanderson Stewart proposal that go back decades that may reflect housing trends.

Steve Hill stated that the local representative for Cushing Terrell doesn't have the experience needed for this study and he thought that is why it was submitted by EPS. Steve suggested that because of our aging community-he isn't sure that focus groups would be available. Steve suggested that the references be contacted and questioned ex, 'how are they to work with, do they stay on budget, are they timely, do they adapt to our needs'.

Donna Volberding reiterated that there is a great need for the valuable information gathered, and that the data would come out in the study and requirements to be defined further and filter the information.

Lydia Janosko offered that she has worked with Sanderson Stewart in the past and is very impressed with their process and outcome.

Jim said the qualifications criteria and understanding of the project should be main evaluators. EPS's approach appears to the policy and not the data. Neighborhood discussion and out-of-state ownership.

It was decided that the references be contacted and an evaluation be made by ALDC. Steve suggested that a database be created with an evaluation as how well they addressed the RFP. The group will meet Thursday, August 27<sup>th</sup> at 10:00.

]

Housing Committee Meeting

Thursday, August 27, 2020, 10:00 AM

Community Service Center 3<sup>rd</sup> Floor conference room

Present: Adam Vauthier, Donna Volberding, Steve Hill, Lydia Janosko, Teah Fuller.

Purpose of the meeting is to review the submitted proposals and to follow up with information obtained by further review and analysis of the proposals.

Information gathered by ALDC was reviewed. It was decided by all in attendance that Sanderson Steward be awarded the contract.

Committee meeting was adjourned.

*BT Lewi ewer*

Housing Goal Sheet-Sanderson Stewart

	Rating 1	Rating 2	Rating 3	
Task 1: Identify current Community Demographics				2
Complete a housing inventory including identification of price, characteristics, and condition for both owner-occupied and rental units				2
Identify housing affordability, adequacy, suitability, availability and accessibility			1	1
Identify current projected labor force and employment			1	1
Identify other indicators of housing and economic hardship where data is available.			1	1
Task 2: Describe the market area				2
Study the existing amenities and identify needed amenities				1
Compare the market rate projects				1
Compare to rent restricted projects				1
Analyze market rate economy				1
Evaluate delineation of the market area				1
Identify housing trends including proposed projects and other new developments				2
Evaluate current market rate supply in comparison to market rate demand			1	1
Task 3: Compare demographic data of ADLC (task 1 )to similar areas to identify why differences may exist				2
Compare housing market of ADLC (Task 2) to other similar areas to identify potential improvements.	1		1	8
				10
Total				18



Reviewer 2

Housing Goal Sheet-Sanderson Stewart

	Rating 1	Rating 2	Rating 3	
Task 1: Identify current Community Demographics				
Complete a housing inventory including identification of price, characteristics, and condition for both owner-occupied and rental units	1			
Identify housing affordability, adequacy, suitability, availability and accessibility			1	
Identify current projected labor force and employment			1	
Identify other indicators of housing and economic hardship where data is available.			1	
Task 2: Describe the market area				
Study the existing amenities and identify needed amenities			1	
Compare the market rate projects			1	
Compare to rent restricted projects			1	
Analyze market are economy				
Evaluate delineation of the market area				
Identify housing trends including proposed projects and other new developments				2
Evaluate current market rate supply in comparison to market rate demand			1	
Task 3: Compare demographic data of ADLC (task 1 )to similar areas to identify why differences may exist				
Compare housing market of ADLC (Task 2) to other similar areas to identify potential improvements.	1			
	3		1	
			8	
				2
Total				10



3rd Reviewer

		Housing Goal Sheet-Sanderson Stewart		
		Did NOT meet expectations	Met Expectations	Exceeded Expectations
Task 1:	Identify current Community Demographics			1
	Complete a housing inventory including identification of price, characteristics, and condition for both owner-occupied and rental units			2
	Identify housing affordability, adequacy, suitability, availability and accessibility			2
	Identify current projected labor force and employment			2
	Identify other indicators of housing and economic hardship where data is available.		1	
Task 2:	Describe the market area		1	
	Study the existing amenities and identify needed amenities			2
	Compare the market rate projects			
	Compare to rent restricted projects			
	Analyze market are economy			2
	Evaluate delineation of the market area			2
	Identify housing trends including proposed projects and other new developments			2
	Evaluate current market rate supply in comparison to market rate demand			2
Task 3:	Compare demographic data of ADLC (task 1 )to similar areas to identify why differences may exist			2
	Compare housing market of ADLC (Task 2) to other similar areas to identify potential improvements.	0	2	21
Total			23	

Housing Goal Sheet-Cushing Terrell

	Did NOT meet expectations	Met Expectations	Exceeded Expectations	
Task 1: Identify current Community Demographics Complete a housing inventory including identification of price, characteristics, and condition for both owner-occupied and rental units Identify housing affordability, adequacy, suitability, availability and accessibility Identify current projected labor force and employment Identify other indicators of housing and economic hardship where data is available.				
Task 2: Describe the market area Study the existing amenities and identify needed amenities Compare the market rate projects Compare to rent restricted projects Analyze market are economy Evaluate delineation of the market area Identify housing trends including proposed projects and other new developments Evaluate current market rate supply in comparison to market rate demand				
Task 3: Compare demographic data of ADLC (task 1 )to similar areas to identify why differences may exist Compare housing market of ADLC (Task 2) to other similar areas: to identify potential improvements.				
Total	9	9	0	

I don't understand this question

How are they to work with?  
Do they stay on budget?  
Do they stay on budget?  
Did they adapt to your needs?

Clear Creek Housing Study, Lisa Lehen,  
lleben@clearcreekcounty.us 303.679.2434  
SS was a subcontractor for our EPS report so  
EPS worked with them. EPS and SS worked well  
together to accurately represent the possibilities and limitations  
of the analyzed property.  
Yes  
Yes  
SS feasibility study was well developed and gave our  
County a proforma that has been beneficial for our plans  
to develop that property since the report. They met our needs.

East Billings Urban Renewal District Housing Study,  
Tim Goodridge, 406.256.2400  
Really good! Used them many times! 2 open projects  
They have stayed on budget on all projects  
Very Timely  
adapted to all needs and he is needy

Sanderson Stewart Ryfomenets



	CT	SS	
Teah	11	10	
Lydia	9	23	
Adam	15	18	
Total	35	51	
Average	11.66666667	17	

Scorer Tally



Bud Myott 1618 Montana Drive 8-10-2020  
Name Address Date

Heather Collins 28 Fir Tree Lane 8-10-2020  
Name Address Date

Keith Collins 28 Fir Tree Lane 8-10-2020  
Name Address Date

John Char 372 GARRITY 8-10-2020  
Name Address Date

Kevin D. Beck 199 Handfall Rd 8/10/20  
Name Snap it - KB Enterprises Address Date

Drew Allen 504 Elm St 8/10/20  
Name Address Date

Corey Whitley 1637 Thomas Ave 8/10/20  
Name Corey Whitley - ITB Address Date

Eric Anderson 808 E 7th 8/10/20  
Name Address Date

James Dawson 609 E Commercial 8/26/20  
Name James Dawson Address Date

Shelly Finnegan Goffup Lane 59711 8/27/2020  
Name Shelly Finnegan Address Date



Name Michael O'Rourke Address

400 Poplar

Address

8/27/2020

Date

Kyle Phillips

Name

505 Maple

Address

8/27/2020

Date

Robbie Gunderson

Name Robbie Gunderson

909 Gorseburn Rd

Address

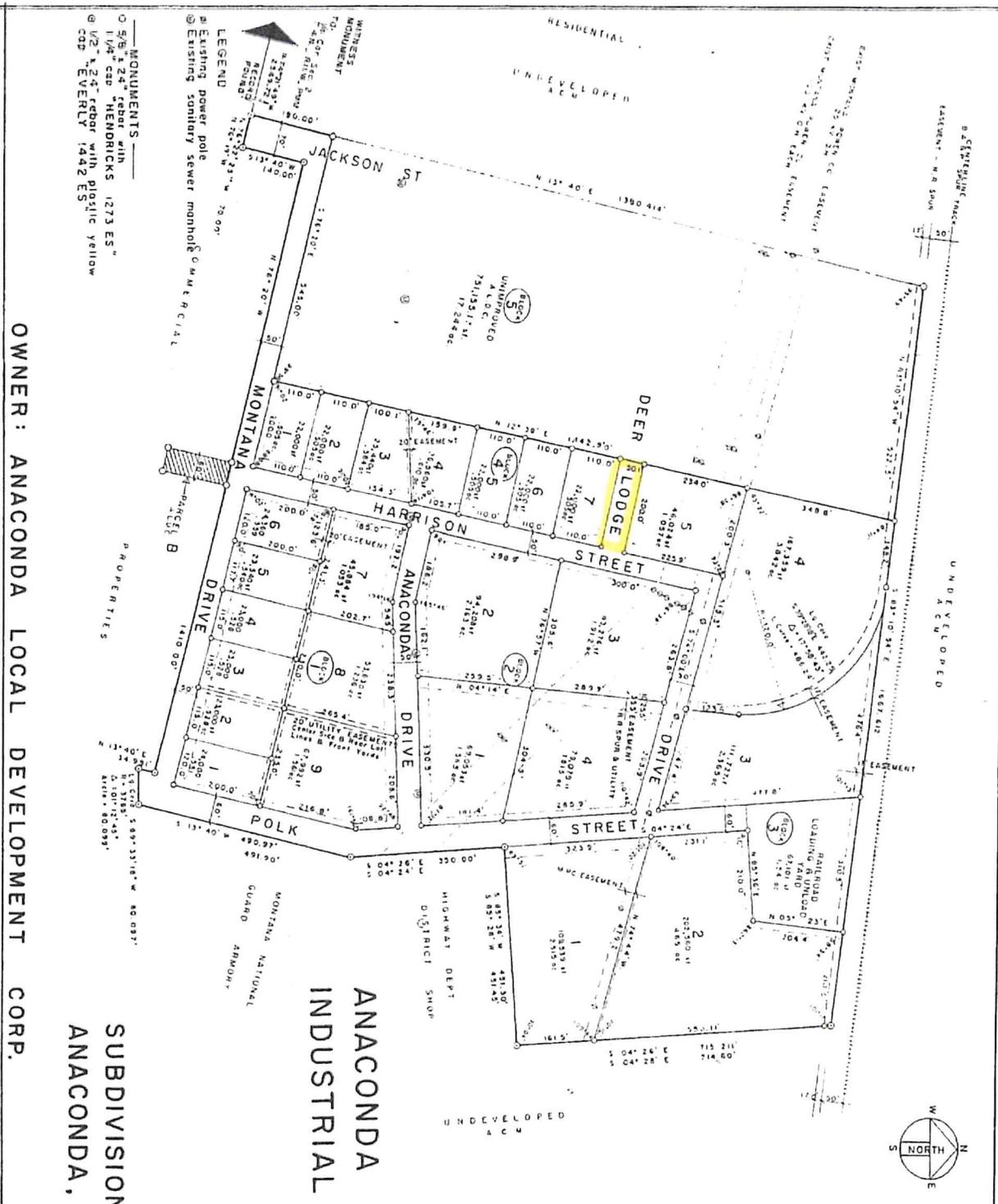
8/27/20

Date

Name

Address

Date



**ANACONDA INDUSTRIAL PARK ADDITION**

**FINAL PLAT**

GROSS AREA 2,524,175.4051 - 5794.70c  
 NET AREA 2,230,615.2651 - 51,208.0c  
 STREET ROW 293,560.1451 - 6739.0c

**SUBDIVISION TO ANACONDA, MONTANA**

**OWNER: ANACONDA LOCAL DEVELOPMENT CORP.**

FILED FOR RECORD  
 1984  
 MARY S. GIBSON  
 COUNTY CLERK  
 ANACONDA, MONTANA

SCALE: 1" = 100'

VICINITY MAP showing the site location within the City of Anaconda, Montana, East Section.

11/2 SHEET 1/2



8/6/2020

To the Commissioners of Anaconda-Deer Lodge County

On behalf of Anaconda Local Development Corporation (ALDC), I would like to submit this petition to abandon a small portion of Polk Street, a dead-end spur street that is adjacent to our property along near Deer Lodge Drive (Exhibit 1).

The platted street was originally created via the Industrial Park Addition Subdivision in 1982. As you can see in Exhibit 1, the street is 328' feet long and 40' wide and then dead ends. The street is located within Block 3 between Lots 2 and 3A. The platted street terminates into Anaconda Local Development Property (soon to be an RV resort). ALDC owns the adjacent properties to the north and south, Lots 2 and 3A respectively. ALDC has a prospective buyer for these properties but would like to abandon the dead-end spur to aggregate the lots and make the property ideal for development.

ADLC and ALDC are pursuing this abandonment in concurrence with the future establishment of a high end RV Resort near the Old Works golf course. Apart from ALDC and ADLC, the only other adjacent landowner is Tom Sawyer (to the south), but this abandonment shall not adversely affect them as their approach to their business is from the remaining Polk Street on the eastern boundary of their property. There are no other adjacent landowners.

The abandonment of this street allows for future development on the private lot and helps rearrange property lines so that the County can establish a high end RV Resort. The proposed abandonment removes barriers for development and assists ALDC to sell the land.

Submitted by:

<u>Adam Vukobratovic - ALDC</u>	<u>117 E 7th</u>	<u>8/10/2020</u>
Name	Address	Date

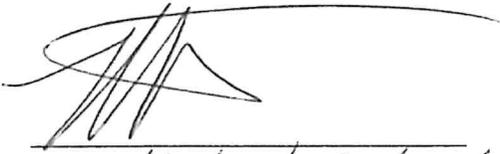
By signing this petition, we acknowledge that we are current freeholders of the ADLC road district and request that a 328' x 40' portion of Deer Lodge Drive be abandoned by the ADLC Commission.

<u>Lynette Yanosko</u>	<u>1209 W 3rd</u>	<u>8-10-2020</u>
Name	Address	Date

<u>Paul Fuller</u>	<u>1817 Hamburg</u>	<u>8-10-2020</u>
Name	Address	Date

<u>Bud Myette</u>	<u>1610 Montana Drive</u>	<u>8-10-2020</u>
Name	Address	Date





Name Michael O'Rourke Address

400 Poplar St

8/27/2020  
Date



Name Address

505 Maple

8/27/2020  
Date



Name Address

909 Gwynn Rd

8/27/20  
Date

Name

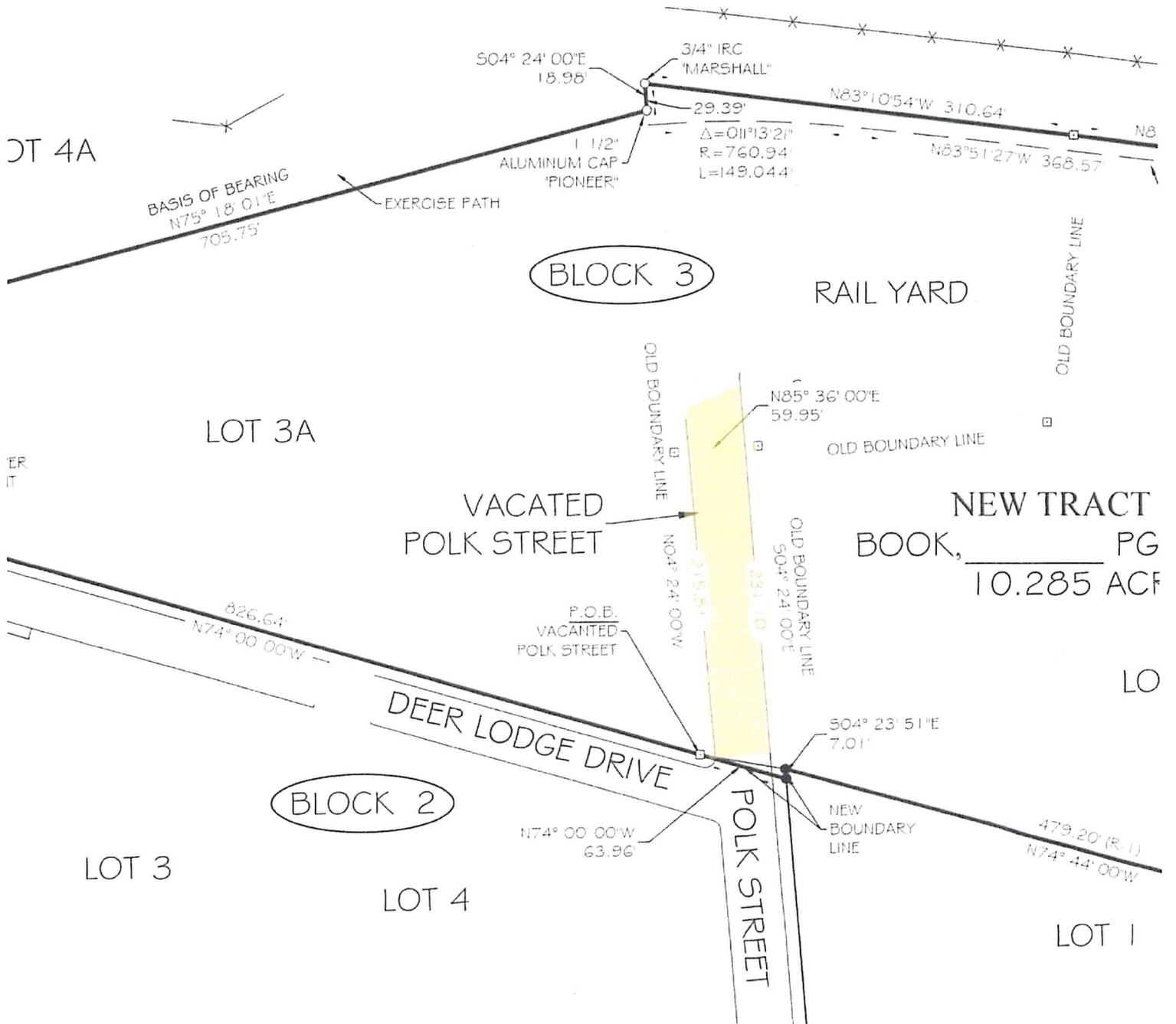
Address

Date

# LODGE COUNTY, MONTANA

PAGE 2 OF 2

OWNER(S) OF RECORD: RED BULL INVESTMENTS, LLC.



BEFORE THE BOARD OF COUNTY COMMISSIONERS  
ANACONDA-DEER LODGE COUNTY, MONTANA



---

AMENDED

PETITION TO DECLARE WASHINGTON STREET FROM SIXTH STREET TO THE  
ALLEY BETWEEN WASHINGTON AND THE FORMER SEVENTH STREET, A CITY  
STREET, IN ANACONDA-DEER LODGE COUNTY, MONTANA

---

1. Come now the undersigned, Freeholders residing in the Anaconda-Deer Lodge County Road District, Anaconda-Deer Lodge County, Montana, and pursuant to Section 7-14-2601 M.C.A., petition the Board of County Commissioners for Anaconda-Deer Lodge County, Montana to declare that the portions of Washington Street, as shown on the original Plat of the City of Anaconda, lying between the intersection of Washington Street and E. Sixth Street and the Intersection of Washington Street and the former E. Seventh Street, a total width of 70 feet with 35 feet either side of the centerline of the originally platted street, lying in the City of Anaconda, in Deer Lodge County, Montana. A map of the proposed street to be opened for through traffic is attached as Exhibit 1.

2. The majority of the land affected by this petition is owned by Jebco, Inc., who is agreeable to the creation of the roads as City street as it will ensure access to their properties for development of five lots located along Washington Street.

3. The only other property owners on the affected streets are Paul D. and Tamy Pucinelli who own the lots on the west side bordering the first one-half block of Washington Street and E. Sixth Street. It is believed that Pucinelli's will object and do not consent to the opening of the street alongside their property.

4. There should be no cost to acquire the right of way as it is either owned by Jebco, Inc., who will donate the road easements it owns to the City, and the remaining parcel is a city street currently, despite an attempt to abandon it in August of 2019. Jebco, Inc. will relocate the fence which crosses north and south, half-way along Washington street to the east side of Washington Street and the South side of E. Seventh Street at its expense. Jebco, Inc., will place a new entrance into the plant across from its lots.

5. The Anaconda-Deer Lodge Board of County Commissioners shall commission a survey to document the City Street that will be established.

Respectfully submitted this 26 day of August, 2020.

Signatures:

Address

David J Hubert

510 W 5<sup>th</sup> St.

Lawrence J Hardala

617 & 619 Chestnut

Ellen J. Munn

105 N Cedar

James Weist

619 W. Commercial 1

Cody Swainston

700 Alder

Jim Anderson

311 Stewart St

Kevin Koravich

1014 Marcus Daly Dr.

Larson Allie

309 E. Front St

Alan S. Bear

3135 N. CABLE RD.

Lyndy D

305 Diane Drive

Vance Johnson

315 Fair View st S

Orlando Jett

6177 Galen Rd

A "Freeholder" is a person who owns real property in the affected road district.

**ANACONDA-DEER LODGE COUNTY SPECIAL EVENT PERMIT**  
Ref. County Ordinance No. 120, Resolution No. 10-32, MCA 7-1-4124-Powers

Application Date: 8.17.2020 Special Event Meeting Date: \_\_\_\_\_

Business/Organization: Anaconda Local Development Corp

Name on Business License: Same

Mailing Address: 118 E 7th Anaconda, MT 59711

Phone Number: 543.5538 Fax: \_\_\_\_\_

Proposed Event: October Fest - the Alley behind the Art Center we would like to close

Location of Event: 401 E. Commercial & Alley behind

Event Date(s): 10.10.2020 Time(s): 11:00 Am - 4 PM

Applicant: Lydia Janosko Lydia Janosko  
(Print Name) (Sign Name)

**Sign-Off & Comments:**

**Fire/Ambulance Department:**  
Ronald F. Tober

**Law Enforcement:**  
Tim Baskell

**Sanitarian Department:**  
Food vendors can contact our office. c  
Chiff, A

**Planning Department:**  
Col 16

**Parks & Recreation:**  
John R. Stodd

**Road Department:**  
Wayne R. Ward

Approved: \_\_\_\_\_ Date: \_\_\_\_\_  
ADLC. CEO



# OKTOBERFEST ANACONDA 2020

JOIN US FOR MUSIC,  
BRATS & BEER!

**Saturday**

OCT  
10TH

**11:00 am to  
4:00pm**

COPPER VILLAGE  
401 E COMMERCIAL

**Over 10 Breweries!**

**Music by Letter B!**

**ACCELERATE ANACONDA**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

09/03/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> East Main Street Insurance Services, Inc. Will Maddux PO Box 1298 Grass Valley CA 95945		<b>CONTACT NAME:</b> Will Maddux <b>PHONE (A/C, No, Ext):</b> (530) 477-6521 <b>E-MAIL ADDRESS:</b> info@theeventhelper.com <b>FAX (A/C, No):</b>	
<b>INSURED</b> Anaconda Local Development c/o Adan Vauthier 118 E 7th Anaconda MT 59711		<b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Evanston Insurance Company <b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	
		NAIC #	35378

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY	Y		3DS5470-M2438996	10/10/2020 12:01 AM	10/11/2020 12:01 AM	EACH OCCURRENCE	\$ 1,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 100,000
	<input checked="" type="checkbox"/> Host Liquor Liability						MED EXP (Any one person)	\$ 5,000
	<input type="checkbox"/> Retail Liquor Liability						PERSONAL & ADV INJURY	\$ 1,000,000
GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:							GENERAL AGGREGATE	\$ 2,000,000
AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY							PRODUCTS - COMP/OP AGG	\$ 1,000,000
UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$							Deductible	\$ 1,000
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			N/A				COMBINED SINGLE LIMIT (Ea accident)	\$
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
							PER STATUTE	
							OTHER	
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Certificate holder listed below is named as additional insured per attached MEGL 2217 01 19.  
 Attendance: 200, Event Type: Festival & Cultural Event - Indoor and/or Outdoor.

**CERTIFICATE HOLDER****CANCELLATION**

Anaconda Deer Lodge County 800 S Main Anaconda MT 59711	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
---------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

© 1988-2015 ACORD CORPORATION. All rights reserved.



## EVANSTON INSURANCE COMPANY

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

### ADDITIONAL INSURED – DESIGNATED PERSON OR ORGANIZATION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE FORM

#### SCHEDULE

**Name Of Additional Insured Person(s) Or Organization(s):**

Anaconda Deer Lodge County  
800 S Main  
Anaconda, MT 59711

A. Section II – Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule of this endorsement, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by the acts or omissions of any insured listed under Paragraph 1. or 2. of Section II – Who Is An Insured:

1. In the performance of your ongoing operations; or
2. In connection with your premises owned by or rented to you.

However:

1. The insurance afforded to such additional insured only applies to the extent permitted by law; and
2. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

B. With respect to the insurance afforded to these additional insureds, the following is added to Section III – Limits Of Insurance:

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

1. Required by the contract or agreement; or
2. Available under the applicable Limits of Insurance shown in the Declarations;

whichever is less.

This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.

All other terms and conditions remain unchanged.

## Lori Sturm

---

**From:** Downtown Market <dt.mkt406@gmail.com>  
**Sent:** Tuesday, August 25, 2020 9:10 PM  
**To:** Lori Sturm  
**Subject:** Request for sponsorship/donation

Hello Lori, my name is Keanah I am organizing a community event October 18th, Sunday in Anaconda. Downtown Market is the name of my for-profit business. I created this business to help communities, businesses, artists, and provide safe entertainment and fun to others during a trying time. I love the Anaconda Strong message and I have seen nothing less than that in spirit and support from this town.

This event is a combined benefit of music, food, artist, education, fundraising. 20% of all ticket sales will be donated to Hearst Free Library, Anaconda Elks Lodge, and Granite County Emergency Medical Services.

The Elks have partnered with this event and they will also be having a fundraiser that evening consisting of dinner and karaoke. 7-9pm.

There is a lot of participation from the communities and I am so happy to be able to work with such kind people in Anaconda.

The three concerts that are arranged:  
1-3pm, 5-7pm, and 9-11pm at the Washoe will cost \$3,000.

At the Elks From 1-6pm: food, education booths, vendors, music will be held. I have not received a rental price yet. Musicians will cost \$1,200.

However, I would appreciate any amount able to be donated to help this event be as successful as possible.

Thank you for you time and consideration. Any questions please contact me 406-546-4144.

Have a wonderful day 😊

Keanah  
Downtown Market  
Founder and Community Event Organizer