MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM

PROJECT APPLICATION GUIDANCE DOCUMENT

January 2025

BACKGROUND and OVERVIEW

I. SUMMIT

The Montana Wildlife and Transportation Summit (Summit) was held on December 4 and 5, 2018 in Helena, Montana. The Summit was co-convened by the Montana Governor's office, Montana Department of Transportation (MDT), Montana Fish, Wildlife & Parks (FWP), Western Transportation Institute (WTI), and Montanans for Safe Wildlife Passage (MSWP). The purpose of the Summit was to bring stakeholders together to strengthen working relationships, share information, develop strategies to plan and implement wildlife accommodations, reduce wildlife-vehicle collisions, and protect wildlife and their movement across state highways. The emphasis of the gathering was to build common ground around wildlife and transportation issues to enable robust engagement of interested stakeholders into the future. More than 160 people attended the Summit, including leadership and staff from state and federal agencies, Tribal nations, non-governmental organizations, and local governments.

II. MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP

Following the Summit, MDT, FWP, and MSWP formed the Montana Wildlife & Transportation Partnership (MWTP or Partnership) to address wildlife and transportation issues in Montana. The Partnership's Steering Committee (Committee) seeks to provide strategic direction and a foundation of resources, information, and knowledge for broad stakeholder engagement to address wildlife and transportation challenges across the state. The scope of the Partnership/Committee is all highways under MDT's jurisdiction and all species of terrestrial wildlife. The authority of the Committee is defined by USC Title 23 and MCA Title 60 for MDT, MCA Titles 23 and 87 for FWP, and endorsement by the MSWP Steering Committee. The Partnership/Committee does not have authority to work on highways outside the jurisdiction of MDT. Visit the Background button on the Partnership website for more information on the inceptions, structure, and work of the Montana Wildlife and Transportation Partnership.

The Committee formed a Data and Information Work Group (DI Group) as part of the effort to establish a statewide vision for collaborative stand-alone wildlife accommodation

projects within the state's highway infrastructure. The DI Group consists of appointed representatives from MDT, FWP, and MSWP with expertise in relevant data production and management, research and analysis, and geographic information systems (GIS). The DI Group developed the Montana Wildlife & Transportation Partnership Planning Tool (MWTP PT or Planning Tool). The Planning Tool is a web-based statewide mapping application and resource for evaluating highway segments of interest for planning wildlife accommodation projects based on wildlife-vehicle conflicts and important areas for wildlife movement and conservation. Generally, the highways highlighted within the Planning Tool are the highways under jurisdiction of the Partnership. Visit the Planning Tool button on the Partnership website for further details about the Planning Tool, the development methodology, and to view and use the Planning Tool. Visit MDT's Interactive Map Gallery for more information on state highways under MDT jurisdiction.

III. MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM

The Committee developed the MWTP Project Program (Program) as a standardized and collaborative approach to receive and evaluate project proposals and select "stand-alone" wildlife accommodation projects to reduce wildlife-vehicle conflicts and improve safe wildlife passage across Montana highways. The project selection process integrates information from the Planning Tool with other evaluation criteria and considerations (e.g., community support, surrounding land use, engineering feasibility) to rate project proposals.

The Program establishes an avenue for public-private partnerships to propose wildlife accommodation projects. The Program addresses the need for transportation projects specifically dedicated to accommodating wildlife with the collaborative engagement of stakeholders, including the leveraging of capacity and capital investment. These projects are expected to be proposed by interested parties. The projects may be implemented by MDT and/or other governmental entities with stakeholder involvement or implemented by the stakeholder depending on the scope and scale of the proposed project. On a limited basis, MDT funding could be available to perform a feasibility analysis of the proposed project, but applicants are expected to identify a combination of funding sources to develop and construct a proposed project.

This Program differs from MDT's internal Wildlife Accommodations Process (WAP), which evaluates the opportunity for inclusion of wildlife accommodations within transportation projects under development early in MDT's design process. Using the WAP, MDT may include wildlife accommodations in highway projects identified within the State Transportation Improvement Program (STIP) to meet highway condition, operation, or capacity needs. For more information about planned highway projects, please review the

STIP or Active Projects Map. MDT will continue to include wildlife accommodations into highway projects through the WAP, which is separate from the new Program put forth by the Montana Wildlife and Transportation Partnership and described herein. Wildlife accommodations included in MDT's WAP are not eligible for inclusion in the Program, but may seek the leveraging of capacity, resources, or funding from private entities through third party contributions.

PROJECT PROGRAM INFORMATION

I. APPLICATION PROCESS

An applicant can be a member of the public, non-profit and non-governmental organizations, public agencies, local governments, community groups, or Tribal governments. Projects that have a strong purpose and need and demonstrated collaboration and/or partnership are more likely to advance. Applicants can propose projects that are of various scales and stages of development. This application process is suitable for projects that are at the concept level, as well as projects further along in development. However, a project is more likely to be supported if it is well developed, substantiated by compelling data, and has potential funding sources identified or secured.

Funding from MDT could be available for feasibility study to further develop projects that are in early planning phases, or projects that are larger in scope and scale or more complex. Feasibility studies are used to determine the practicability, constructability, and level of impact of proposed projects. Feasibility studies also analyze specific project features based on a variety of factors including transportation, environmental, socioeconomic, infrastructure, government and local agency coordination, and public involvement. These studies typically include a longer-term implementation horizon and a financial decision to proceed with project development.

Completed applications, including required attachments, must be submitted electronically on or before the application submittal deadline. Application cycles will initially occur on a semi-annual basis occurring in November and in May. The application window opens on the first of the month and closes on the last day of the month. The Committee will only evaluate and score project proposals based on the completed and submitted application packet. Items or communications submitted outside of the application packet and applications received outside of the application cycle window will not be considered. See page 5 for detailed application guidance.

II. DECISION-MAKING PROCESS

The Committee will review a submitted project application through a standardized process with selection criteria to determine whether the project will advance to the next step in development. There is not a set number of projects that may be selected in any application cycle. The number, types, scale, scope, and locations of projects previously accepted into the Program, agency capacity, and available resources will play a role in determining the suite of projects selected in each cycle.

A. Criteria

The Committee developed criteria to make decisions on what projects to select for implementation through the Program. These criteria can be found in Appendix D. The

application structure is based on the selection criteria, and applicants are encouraged to review the criteria to understand elements that will strengthen a project application. The Committee will use application responses to score each criterion through discussion and consensus.

B. Evaluation

Project applications that have demonstrated a compelling benefit and need, and are conceived and developed through collaborative partnerships, will receive the highest ranking. Scoring is important for consistent and transparent decision-making by the Committee, but a high score does not guarantee the project will move forward. Some project proposals or applications may be returned to the applicant for further development or modification. If desired, the applicant will have the opportunity to modify the project proposal or further develop application responses and resubmit during a subsequent application cycle.

The Committee will evaluate project applications using the following 5-step process:

Phase I – Go/No Go

- **Step 1.** The Committee will review all complete applications received in each application cycle.

- **Step 2**. The Committee will determine whether a project application will move to the next stage using a consensus based decision-making process.
    - The project contact will receive notification regarding the Committee's decision. If a project is not advanced, the project contact will receive explanation regarding the Committee's decision. The Committee may provide guidance on how a declined proposal can be improved for a future application submission.

Phase II – Scoring

- **Step 3**. If advanced, technical experts from MDT, FWP, and MSWP will further evaluate an application and provide feedback to their Committee representatives. The Committee members will score each response in an application. The two Committee members of each entity will discuss and agree on a single score for each response. Each entity will bring a single score forward to Step 4.

- **Step 4**. The Committee will reconvene and discuss all scored applications in that application cycle. Using a consensus based decision-making approach, the Committee will determine which project proposals will advance to the next step.

Each application response will receive a single consensus-based score with explanation from the Committee.

- The project contact will receive notification regarding the Committee's decision. If a project is not advanced, the project contact will receive explanation regarding the Committee's decision. The Committee may provide guidance on how a declined proposal can be improved for a future application submission.
- Improved project applications and some projects that were not selected in the current application cycle will be eligible for resubmittal during a future application cycle.
- A project may be approved for advancement with recommendations and minor modifications that do not necessitate resubmittal during a future application cycle. This will be determined by the Committee on a per project basis.

Phase III – Feasibility Study

- **Step 5**. Projects selected by the Committee within each application cycle will advance to the next steps of analysis, design, and implementation. The duration and complexity of the process will depend on the scope and scale of the project. For simple projects, this will likely entail an encroachment permit review process. For more complex projects, this will include a feasibility study. The Committee will communicate the next steps for project development and implementation to the project contact of selected projects.

MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM

DETAILED PROJECT APPLICATION GUIDANCE

Refer to this Detailed Project Application Guidance for instructions on completing each section of the application. Include the necessary attachments.

The on-line fillable project application form is available at:

MWTP Program Application Form

Incomplete applications and applications received outside of each application cycle will not be evaluated during the current application cycle. The Committee encourages applicants to be as concise as possible, while still providing sufficient detail to understand all facets of the proposed project and evaluate the merits of the project based on the selection criteria.

I. APPLICATION INFORMATION (not scored)

A. Applicant Name, Affiliation, and Contact Information (mailing address, phone, email)

B. Contact Person and Contact information (if different than applicant)

C. Landowner and/or Lessee Name(s) and Contact information Include names and property addresses of immediately adjacent and directly impacted landowners, both public and private. This information is available from Montana Cadastral. Note whether you have discussed the project with these individuals. Discussion with adjacent landowners may not be necessary for some projects that are small scale, limited scope, and/or occur only within the highway right-of-way.

II. PROJECT INFORMATION (not scored)

A. Project Name Use a descriptive project name that includes the general location and project type (e.g., Happy Valley Overpass; Underpasses Hwy 123 west of My Town; Wildlife Fencing at Cold Creek Bridge)

B. County

C. Highway and Mile Markers Mile Markers (MM) can be found by searching the Planning Tool. Include MM to the 0.10-mile if possible. Include discrete MM locations for spot improvements (e.g., sign location, structure, jump-out

location). Include MM ranges for longer stretches of treatments (e.g., runs of fencing).

D. **Geographic Location** Described by Township Range Section (TRS), Lat/Long, or precise geographic location. TRS can be found on Montana Cadastral.

E. **Provide a brief overview of your project** Identify the challenge, proposed solution, and expected benefits in a few sentences to one paragraph in length.

III. NEEDS and BENEFITS (Max 20 points, Weighted x 3 = 60 points)

A. **Describe the PURPOSE and NEED of your project. (Score 0-5)** Include a detailed description of the challenge, proposed solution, and expected benefit. This section should highlight the justification for your project. While this section should summarize the following B, C, and D responses, it should be able to stand alone as the primary story of the project's purpose.

B. **Describe and provide the DATA that support your project purpose and need. (Score 0-5)** Reference and/or provide the data summaries, analyses and other information sources used and describe how they support the project's purpose and need. Include both broad scale and localized (fine-scale, project level) data summaries and analyses, if possible. Identify sources for data and/or analyses. Include original data summaries or analyses as attachments.

   Example data sources may include but are not limited to: Montana Wildlife & Transportation Partnership Planning Tool, scientific or practitioner literature citations and references, collar data from public agencies, camera trap data, documented observational data (tracks, hair, paths, etc.), analysis results from public agencies or university research, relevant citizen-science datasets, wildlife habitat/movement models from various sources, and local knowledge. Using the Planning Tool, identify the score of each of the project highway segments within the project area and the average score over all the segments in the project area. Described how the Planning Tool informed the selection of the general project area.

C. **Describe your PROJECT PROPOSAL. Include detailed description of the specific features and strategies proposed in your project. (Score 0-5)** Describe specific features and strategies for addressing each aspect of the purpose and need described above. Include number, size, location, extent, length, etc. Projects can be a range or combination of scopes or

scales (e.g., fencing, overpass, signage, or all of the above). Include whether the project is a proposal for new infrastructure or includes a retrofit or modification of existing infrastructure.

D. **Describe the expected BENEFITS of your project (safety/connectivity). (Score 0-5)** Include case study examples, expert opinion, and/or scientific literature that support or illustrate the expected benefits of the proposed accommodation features and strategies by showing the type and extent of expected change in condition or consequences of project implementation. Describe how you expect your project to achieve these benefits. Describe how the project features and strategies reduce wildlife-vehicle conflict and/or help improve connectivity within the broader landscape.

IV. PROJECT IMPLEMENTATION (Max 20 points)

A. **Describe the LANDOWNER and COMMUNITY involvement and support of your project. (Score 0-5)** There are several ways to demonstrate landowner and community involvement/support. Possible examples include project endorsements (i.e., letters of support), development of working groups or partnerships, public meeting comments, etc.

It is critically important to garner the involvement and support of landowners of property immediately adjacent to the project, or if consequences of the project have the potential to directly affect property owned or managed by others. This is true of all property outside of MDT right-of-way, be it private, public, tribal, or other. Describe the extent to which you have engaged these individuals and describe their feedback on the project proposal.

B. **Describe the LAND PROTECTIONS and LAND USE on the properties adjacent to or directly affected by your project. (Score 0-5)** This can include conservation easements, land use/zoning type, restrictions, requirements, or covenants, public land, nearby conservation investments and activities, and adjacent current, planned, or future land uses and activities.

This may include management direction that impacts the project area, including relevant plans, reports, or guidance from MDT, FWP, USFWS, USFS, BLM, Tribes, or local government, such as county or city growth policies or management plans, the Statewide Transportation Improvement

Plan, State Wildlife Action Plan, SO 3362 MT Action Plan, National Forest Plans, BLM Resource Management Plans, etc.

C. **Describe other PLANNED or COMPLEMENTARY EFFORTS (public or private) that add value to your project. (Score 0-5)** Describe any efforts completed, underway, or planned within or outside of the highway corridor and in the vicinity of the project that would add value to a wildlife accommodation project. These may include but are not limited to human-wildlife conflict mitigation projects (e.g. securing attractants, electric fencing, range riders or shepherds), wildlife-friendly fencing projects, or habitat restoration projects. These may be associated with agencies, organizations, private individual efforts, or others. Identify the status of the effort and the implementing entity(ies).

D. **What PARTNERSHIPS are in place in support of your project and what ROLE does each partner play in project implementation? (Score 0-5)** Identify the project partners and describe the role of each partner in developing, implementing, and/or funding the project.

V. FUNDING (Max 10 points)

In this section, we encourage you to work with an engineering firm or MDT staff to assist you in building the cost estimate.

Note: An example of a completed Project Budget Worksheet is included in Appendix B for your reference. Ensure you download the MWTP Project Budget Worksheet Template, under a new name, then upload and submit your completed worksheet with your project application. Complete both the Costs and Revenue tabs and submit one Project Budget Worksheet for your project.

A. **Provide the COST ESTIMATE for your project. (Score 0-5)**
Provide the total estimated cost of project implementation, including project development, design, and construction to the extent possible. **Feasibility, Engineering Design and Construction Engineering are all auto-fill costs based on the construction subtotal.** Include estimates for major line items in your proposal. Average bid prices from the most current year are available from the MDT Contract Archives website. **Note:** These prices include labor and equipment costs associated with installation of that item. Contingency is calculated based on the level of design that has been completed. If you only have a few items identified, select “no level of design

is complete". If you have enlisted the assistance of an engineer and they have calculated the major design features (e.g., bridge, culvert, fencing, and associated roadway impacts), select "design complete". If a feasibility study has been completed for the project, select "feasibility study is complete". MDT will provide standard values for inflation and indirect cost allocation plan (ICAP) in the template on an annual basis. For inflation, you will need to assume the year construction will take place. For a minor vegetation or fencing project, assume 2 years. For a larger/major project with funding in place, assume 3 years. For all other projects, assume 5 years. MDT personnel, engineering consultants, product or material vendors, or contractors may also be able to assist with cost estimation.

B. Describe the FUNDING CONTRIBUTIONS and SOURCES proposed for your project. (Score 0-5)

Funding does not have to be fully secured to submit an application. Describe how you anticipate securing funding for the project. The project funding must be secured to proceed beyond the feasibility study phase. On a case-by-case basis (e.g., no federal funding involved at the time and a less complex project proposal), MDT may proceed into the project development phase when sufficient funding is in place to complete the design, regardless of project phase. Describe the project funding plan, including a description (i.e., amount and status) of anticipated funding sources for your project. Indicate if funding is secured, pending, or possible and identify timeframes and steps required to secure funding sources. The spreadsheet will calculate the difference between the cost estimate and the projected revenue. If the spreadsheet shows a positive value for "Current Gap in All Funding" describe options you propose to cover that gap, if known. Describe opportunities and potential for procurement of additional funding for project implementation, if needed.

VI. PRELIMINARY PROJECT FEASIBILITY and OPPORTUNITY (Max 25 Points)

In Section VI, information requirements will depend on the scope of the project. All projects may not require each component listed below. To help with determining what is required, some information requests have been split between less complex projects and more complex projects.

Less complex projects may include the following: Minor fencing or wing-fencing, signing, vegetation management within the right-of-way (ROW), no major equipment operation or earth moving activities, minimal ground disturbance, limited design requirements, no system impact, authorizations

limited to an encroachment permit authorized by MDT. A system impact is considered a disruption to traffic flow or the travelling public and any effects or modifications to infrastructure or appurtenances within the right-of-way of highways and roadways under MDT jurisdiction. An encroachment permit is an authorization granted by MDT for entities other than MDT to perform work or maintenance within the highway ROW. The Encroachment Permit Application is available at https://app.mdt.mt.gov/mntencr/.

More complex projects may include the following: Additions or modifications to existing infrastructure with system impact, longer stretches of wildlife exclusionary fencing with jump-outs, replacement of existing wildlife crossings, new structures on any facility, projects where engineering and design is required, and projects likely to require authorizations and/or agreements from multiple entities/agencies. More complex projects will likely require an engineering survey and analysis of the proposal to determine the design and construction feasibility of the proposed project. This analysis can be performed by the applicant but is not required at the time of the application. If not completed, MDT or an outside firm may be required to perform the analysis prior to moving toward project design and implementation.

A. Describe input received from ENGINEERING OR TECHNICAL EXPERTS regarding the reasonable feasibility of your project proposal. (Score 0-5)

Describe which engineering and/or technical experts (MDT, FWP, Tribal, other) you worked with and what assistance or information they provided in assessing and evaluating the design/construction feasibility of your project proposal. This could include identification of red flags that resulted in a change to proposed project features, location, or extents, identification of items that may require further investigation and evaluation in the feasibility study phase, or other input that informed your project concept and proposal. Document any endorsements, concerns, or potential drawbacks of your project identified through this consultation.

Include specifics, if provided through your consultation, that will assist in determining the feasibility of the proposed project. For example, the local terrain and 20’ fill section provides adequate depth for a culvert/bridge underpass. Alternatively, the local terrain and 5’ fill section will likely require a substantial grade raise to accommodate the proposed underpass. Another example might be, the topography within the project area (e.g., rock outcrops, steep cut sections) provides logical end points to tie-in exclusionary fence, guiding wildlife to the crossing. Alternatively, the topography within the project area (e.g., graded agricultural land, flat grades

between the roadway and the adjacent ground) is not ideal to tie-in exclusionary fence. Additional measures to prevent animals from entering the highway side of the fence (end-runs) may be required.

B. Describe input received from WILDLIFE BIOLOGISTS, TRANSPORTATION ECOLOGISTS, or OTHER EXPERTS regarding the identified challenge, purpose and need, proposed solution, and expected benefits. (Score 0-5) Describe which biologists, road ecologists and/or technical experts (MDT, FWP, Tribal, other) you worked with and what assistance or information they provided in assessing and evaluating the feasibility of your project proposal. This could include information that the project is not situated appropriately in the landscape based on their knowledge/data of where the elk herd crosses the highway, or new ownership of a property and subsequent operations have changed the movement pattern of the local deer herd. Other input or suggestions for improvements or modification to the project concept may assist in more appropriately addressing the challenge, fulfilling the stated purpose and need, identifying the appropriate solution, and supporting the expected benefits associated with the project. Other road ecology experts or scientists can be consulted for additional support of your proposal. Document any endorsements, concerns, or potential drawbacks of your project identified through this consultation.

C. Describe your proposal for CONSTRUCTION of your project. (Score 0-5) Explain who/which entity you are anticipating will administer the bidding and construction of the proposed project (e.g., MDT, local/tribal government, or a private entity). If not MDT, include contact information and other pertinent information regarding the experience and ability of this entity to bid and/or construct your project. Contractors must meet applicable licensing, insurance, and bonding requirements.

For less complex projects, construction is typically expected to be completed by the applicant or their agent (consultant/contractor) through an MDT encroachment permit (see link above in section VI). Describe if the work will be performed from the adjacent land (outside of MDT R/W) or within MDT R/W and to what extent.

D. Describe your proposal for POST-CONSTRUCTION MONITORING of your project effectiveness and benefit. (Score 0-5)

All projects will require some post-construction monitoring. Not all wildlife accommodation projects necessitate a comprehensive research study to evaluate accommodation effectiveness in providing safe passage for

wildlife and reducing wildlife-vehicle conflict. In-depth research may be warranted for projects that employ novel strategies or designs and/or for species for which there is limited research regarding use of crossing structures. For other projects using more standard strategies and designs, simply comparing 5-year pre- and post-construction wildlife-vehicle conflict rates (crash and carcass data) will usually provide sufficient evaluation of wildlife accommodation project effectiveness. The deployment of camera traps to monitor the use and refusal of crossing structures and movement at the fence ends and/or jump-outs can help capture changes in movement and permeability/connectivity.

Describe your monitoring plan and personnel/entity(ies) expected to evaluate and document to what extent you are achieving the purpose and expected benefits of the project, lessons learned, and any unforeseen consequences or adaptive management recommendations.

E. Describe your proposal for SHORT AND LONG-TERM MAINTENANCE and OPERATION of the proposed infrastructure and features associated with your project. (Score 0-5) For all projects, day–to-day maintenance (e.g. vegetation management, fence repair, etc.) is expected to be performed by the applicant or their agent. Maintenance agreements will be required and must be between MDT and a governmental entity such as a local or tribal government, or a subdivision of a local government such as a Conservation District. MDT will be responsible for the maintenance of project features on the interstate system and long-term inspection, maintenance, repair or replacement of structures or other major facilities. Operation of implemented project features (e.g., power, solar, lights, cellular, VMS signs, electronics, etc.) may be the responsibility of others as executed through agreements. If the project was executed through an encroachment permit (i.e., less complex projects), it is expected that the permit would extend to the maintenance activities. If no encroachment permit was obtained for the project (i.e., more complex projects), an encroachment permit will be necessary for the performance of maintenance activities by others.

Describe your proposal for the short- and long-term maintenance and operation of the project features and identify the responsible party(ies) or individuals. Include a proposed schedule and means of inspection of the affected features.

APPENDIX A

MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM

PROJECT APPLICATION OUTLINE

This is only an outline of the Project Application provided for your reference. Do not submit this outline as an application form. The on-line fillable project application form is available at MWTP Program Application Form. Application cycles are typically run in spring and fall, May 1 - May 31 and November 1 - November 30. It is anticipated the Partnership will host one or two application cycles per year for the foreseeable future.

Refer to the Detailed Project Application Guidance for instructions on completing each section of the application. Include the necessary attachments. Incomplete applications and applications received before the application cycle opens or after the application cycle closes will not be evaluated during the current application cycle.

I. APPLICATION INFORMATION (Not scored)

A. Applicant Name, Affiliation, and Contact Information (mailing address, phone, email)

B. Contact Person and Contact Information (if different than applicant)

C. Landowner and/or Lessee Name(s) and Contact Information (MT Cadastral)

II. PROJECT INFORMATION (Not scored)

A. Project Name

B. County

C. Highway and Mile Markers

D. Geographic Location

E. Provide a brief overview of your project (a few sentences to one paragraph in length)

III. NEEDS and BENEFITS (Max 20 points, Weighted x3 = 60 points)

A. Describe the **PURPOSE and NEED** of your project **(Score 0-5)**

B. Describe and provide the **DATA** that support your project purpose and need **(Score 0-5)**

C. Describe your **PROJECT PROPOSAL**. Include detailed description of the specific features and strategies proposed in your project **(Score 0-5)**

D. Describe the expected **BENEFITS** of your project (safety/connectivity) **(Score 0-5)**

IV. PROJECT IMPLEMENTATION (Max 20 points)

A. Describe the **LANDOWNER and COMMUNITY** involvement and support of your project. **(Score 0-5)**

B. Describe the **LAND PROTECTIONS and LAND USE** on the properties adjacent to or directly affected by your project **(Score 0-5)**

C. Describe other **PLANNED or COMPLEMENTARY EFFORTS** (public or private) that add value to your project **(Score 0-5)**

D. What **PARTNERSHIPS** are in place in support of your project and what **ROLE** does each partner play in project implementation? **(Score 0-5)**

V. FUNDING (Max 10 points)

A. Provide the **COST ESTIMATE** for your project. **(Score 0-5)**

B. Describe the **FUNDING CONTRIBUTIONS and SOURCES** proposed for your project. **(Score 0-5)**

VI. PRELIMINARY PROJECT FEASIBILITY and OPPORTUNITY (Max 25 Points)

A. Describe input received from **ENGINEERING OR TECHNICAL EXPERTS** regarding the reasonable feasibility of your project proposal **(Score 0-5)**

B. Describe input received from **WILDLIFE BIOLOGISTS, TRANSPORTATION ECOLOGISTS, or OTHER EXPERTS** regarding the identified challenge, purpose and need, proposed solution, and expected benefits **(Score 0-5)**

C. Describe your proposal for **CONSTRUCTION** of your project **(Score 0-5)**

D. Describe your proposal for **POST-CONSTRUCTION MONITORING** of your project effectiveness and benefit **(Score 0-5)**

E. Describe your proposal for **SHORT AND LONG-TERM MAINTENANCE and OPERATION** of the proposed infrastructure and features associated with your project **(Score 0-5)**

APPENDIX B

MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM

PROJECT BUDGET WORKSHEET EXAMPLE

This is only an image of a completed Project Budget Worksheet provided as an example for your reference.

Download and complete the Project Budget Worksheet Template.

Ensure you download the excel template, save it to your computer under a new name, then upload and submit your completed worksheet with your project application.

There are two sheets in the workbook: COSTS and REVENUE. You will fill information into the white cells. All calculations in the cells shaded gray will auto-populated by formula. The blue shaded cells allow you to insert additional rows into the worksheet. Watch for drop down menus in some cells and select one of the options available.

The "Other Cost Estimating Information" provides you the calculations for auto-populated items and further information and resources to assist you in this cost estimating exercise.

APPENDIX B
MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM
PROJECT BUDGET WORKSHEET

Applicant:	ABC Collaborative			
Contact:	Jane Doe			
Project Name:	Happy Valley Wildlife Underpass			

Complete Both Worksheets: COSTS and REVENUE or the Application will be Returned

PROJECT COST ESTIMATE

Item Description	Unit of measure	Number of units Quantity	COST/UNIT	TOTAL COST
Engineering Costs (project development costs)				
Feasibility				$ 153,536
Engineering Design				$ 153,536
Construction Engineering (Inspection)				$ 102,357
Right of Way	Acres	0.5	$ 15,000	$ 7,500
				$ -
Use this row to add "Engineering Costs" row(s) above. Right click on the row number to the left of this cell and select "Insert". A new row(s) will be added above. Repeat for additional rows as needed.	Then copy the formula from this row in Column E by hovering over the lower right-hand corner of the cell until you get a black "+". Drag the black "+" up to the cell in Column E of the newly inserted row(s).			$ -
		Engineering	**Sub-Total**	**$ 416,928**
Construction Materials*Use hyperlink to MDT Award Sheets Archives below**				
Reinforced Concrete Box 14 x 9	LNFT (linear feet)	90	$ 2,707	$ 243,630
Fence - Wildlife (Exclusionary)	LNFT	10565	$ 12	$ 126,780
Wildlife jumpouts	EACH	2	$ 15,000	$ 30,000
Fence - Wildflie Friendly (FM)	LNFT	4000	$ 3	$ 12,000
Revegetation	Acre	1.2	$ 1,549	$ 1,859
Tree and Shrub Planting	LS (lump sum)	1	$ 11,253	$ 11,253
Use this row to add "Construction Material Costs" row(s) above. Right click on the row number to the left of this cell and select "Insert". A new row(s) will be added above. Repeat for additional rows as needed.	Then copy the formula from this row in Column E by hovering over the lower right-hand corner of the cell until you get a black "+". Drag the black "+" up to the cell in Column E of the newly inserted row(s).			$ -
		Material	Sub-Total	$ 425,522
Equipment, Labor, and Mobilization				
Traffic Control	15% of construction materials sub-total above		On Roadway	$ 63,828
Mobilization	20% of construction materials sub-total above			$ 85,104
		Labor and Equipment	Sub-Total	$ 148,933
MDT Standard Values				
Contigency	Dependent on level of design and complexity		no level of design complete	$ 287,227
Inflation	Enter number of years to construction		3	$ 64,626
Indirect Cost Allocation Plan (ICAP)				$ 97,262

Only enter information into unshaded cells	
OTHER COST ESTIMATING INFORMATION:	
Feasibility - Estimate at the lower of 15% of construction cost or $500,000 - *value will autopopulate*	
Engineering Design - Estimate at approximately 15% of construction cost - *value will autopopulate*	
Construction Engineering (Inspection) - Estimate at 10% of construction cost - *value will autopopulate*	
Right of Way - Provide an estimated cost per acre along with the number of acres to be purchased in fee title or easement.	
*Units = Linear feet, hours, cubic yards, each, etc. Do not use "lump sum" unless there is no other way to describe the costs.	
MDT Average Bid Prices link: https://www.mdt.mt.gov/business/contracting/bid-archives.aspx	
Traffic Control - Only include an estimate if work will take place within the roadway right-of-way. Choose "On Roadway / Not On Roadway"	
Mobilization - *value will autopopulate*	
Contigency - 50% for no level of design complete, 35% if a feasibility study is complete, and 25% if design is complete through Scope of Work *MDT may adjust based on Project Risk - value will autopopulate*	
Inflation - 2.5% - Select the number of years you estimate to get to construction. Choose lower numbers for less complex projects and higher numbers for more complex projects	
ICAP - Average varies between 10% and 11% annually - *value will autopopulate*	

FUNDING CONTRIBUTIONS			
CONTRIBUTOR (Source)	**Amount**	**Status (Secured/Pending/Possible) Use Dropdown List**	**If Pending or Possible, describe process and timeline ***
Donor 1 Name	$ 300,000.00	Secured	
NGO 1 Name	$ 225,000.00	Secured	
Discretionary Grant XYZ	$ 500,000.00	Pending	Application submitted 7/12/2024
Landover A Name	$ 50,000.00	Possible	Verbal Commitment 5/15/2024
NGO 2 Name	$ 100,000.00	Possible	Fund Raising 8/1/25
Total of ALL Funding Categories	**$ 1,175,000.00**		

CONTRIBUTION SUMMARY			
Total Project Cost	**$ 1,440,498**		
Current Gap in Secured Funding	**$ 915,498**	**Current Gap in ALL Funding**	**$ 265,498**
Total Secured Funding	**$ 525,000.00**		
Total Pending Funding	**$ 500,000.00**		
Total Possible Funding	**$ 150,000.00**		

*** Use additional page as needed or describe in Application response.**

Only enter information into unshaded cells

STATUS DEFINITIONS:

Secured = Funding In hand

Pending = Applied for grant and status pending, written pledge/commitment/agreement, etc.

Possible = Verbal pledge, pursuing other possible sources yet uncommitted, etc.

APPENDIX C

MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM

PROJECT APPLICATION ATTACHMENTS

These attachments are part of the application and are required for both less and more complex projects as described above, unless otherwise noted below.

I. APPLICATION INFORMATION

- ❑ List of immediately adjacent and directly impacted landowners, addresses and contact information from MT Cadastral.

II. PROJECT INFORMATION

- ❑ Map (one or more) that includes:
  - ☐ Extent of project, including context (relation to major landmarks or towns), county boundaries, etc.
  - ☐ Mile markers
  - ☐ Indication of public and private property
  - ☐ Conservation easements

III. NEEDS and BENEFITS

A. Describe the PURPOSE and NEED of your project.

No attachments needed.

B. Describe and provide the DATA that support your project purpose and need.

- ❑ List and provide citations for relevant sources, references, or data summaries and analyses that were referred to within Section III.B. of the application.

- ❑ Provide data summaries and analyses for the broadscale and fine-scale data (referenced or original) that specifically support your project purpose and need.

C. Describe your PROJECT PROPOSAL. Include detailed description of the specific features and strategies proposed in your project.

- ❑ Aerial photo of project site(s), with general sketches of proposed project features

- ❑ If available, any detailed sketches or plan views that help illustrate the project

- ❑ If available, any pre-project photographs that help illustrate the project

D. Describe the expected BENEFITS of your project (safety/connectivity).

- ❑ Any relevant sources, references, citations, or other documentation from sources referred to within Section III.D. of the application.

IV. PROJECT IMPLEMENTATION

A. Describe the LANDOWNER and COMMUNITY involvement and support of your project.

- ❑ Project endorsements or letters/statements of support, including entity and contact information

- ❑ Other documents indicating landowner and community involvement

B. Describe the LAND PROTECTIONS and LAND USE on the properties adjacent to or directly affected by your project.

- ❑ Relevant sources, references, or documents that are needed to indicate existing or pending land protections and land use in the area.

- ❑ Contact information for these sources as appropriate or available.

C. Describe other PLANNED or COMPLEMENTARY efforts (public or private) that add value to your project.

- ❑ Any relevant sources, references, or documents that are needed to indicate planned or complementary efforts that add value to the project.

- ❑ Contact information for these sources, as appropriate or available.

D. What PARTNERSHIPS are in place in support of your project and what ROLE does each partner play in project implementation?

- ❑ List project partners, affiliation, and contact information.

- ❑ Include any agreements, if relevant.

V. FUNDING

- ❑ Download, complete and submit the Project Budget Worksheet shown in Appendix B for your cost estimate and funding contributions, sources, and status.

- ❑ Use an additional page if needed to describe process and timeline for pending or possible funding contributions. Include a list of additional funding partners, if needed, or other potential funding sources. Include affiliation, title, and contact information.

VI. PROJECT FEASIBILITY and OPPORTUNITY

A. Describe input received from ENGINEERING OR TECHNICAL EXPERTS regarding the reasonable feasibility of your project proposal.

- ❑ Aerial photo of project site(s) showing items described in VI.A of the application, to the extent known

- ❑ Documentation from and contact information for entity(ies)/personnel consulted

- ❑ Engineering evaluations/reports, if completed

B. Describe input received from WILDLIFE BIOLOGISTS, TRANSPORTATION ECOLOGISTS, or OTHER EXPERTS regarding the identified challenge, purpose and need, proposed solution, and expected benefits.

- ❑ Documentation from and contact information for entity(ies)/personnel consulted

- ❑ Biologist/Ecologist notes, evaluations/reports, if completed

C. Describe your proposal for CONSTRUCTION of your project.

- ❑ Contact information for entity(ies)/personnel identified in Section VI.C of the application

- ❑ Additional supporting agreements, estimates, or other documentation, as available

D. Describe your proposal for POST-CONSTRUCTION MONITORING of your project effectiveness and benefit

- ❑ Contact information for entity(ies)/personnel identified in Section VI.D of the application

- ❑ Additional supporting agreements, estimates, or other documentation, as available

E. Describe your proposal for SHORT AND LONG-TERM MAINTENANCE and OPERATION of the proposed infrastructure and features associated with your project

- ❑ Contact information for entity(ies)/personnel identified in Section VI.E of the application

- ❑ Additional supporting agreements, estimates, or other documentation, as available

APPENDIX D

MONTANA WILDLIFE & TRANSPORTATION PARTNERSHIP PROJECT PROGRAM

STEERING COMMITTEE PROJECT SELECTION CRITERIA

The Committee has developed these criteria to guide their scoring and assist in the evaluation and selection of projects for implementation through the Program. Scoring for each section will range between 0 and 5 (0, 1, 2, 3, 4, or 5). Each section will receive one consensus-based score from the Committee. Bulleted items below do not directly relate to points awarded for each category. The items included and level of detail in the information provided by the applicant is expected to be commensurate with the scope and scale of the project proposal.

I. APPLICATION INFORMATION (Not Scored)

A. Applicant Name, Affiliation, and Contact Information (mailing address, phone, email)
B. Contact Person and Contact information (if different than applicant)
C. Landowner and/or Lessee Name(s) and Contact information (from MT Cadastral)

II. PROJECT INFORMATION (Not Scored)

A. Project Name
B. County
C. Highway and Mile Markers
D. Geographic Location
E. Provide a brief overview of the project

III. NEEDS and BENEFITS (Max 20 points, Weighted x 3 = 60 points)

A. Purpose and Need of project (Score 0-5)

- Clearly articulated a compelling challenge to be addressed (need)
- The location of the project will appropriately address the challenge
- Clearly articulated solution that will appropriately address the challenge (purpose)
- Clearly articulated expected benefit from the project (safety/connectivity)
- The proposed project is sufficiently justified and reasonable

B. Supporting Data (Score 0-5)

- Clearly articulated the data used
- Data used supports purpose and need of project
- Utilized relevant and sufficient data for broad scale assessment
  Examples may include:
  - Montana Wildlife and Transportation Planning Tool (MWTPT)
    - Conflict / Barriers (MWTPT NAC 1, 5)
    - Movement / Conservation (MWTPT NAC 2, 3, 4)
    - Identified the score of each of the project highway segments within the project area and the average score over all of the segments in the project area. Described how the Planning Tool informed the selection of the general project area.
  - Scientific/practitioner literature, research
- Utilized relevant and sufficient data for finer scale assessment
  Examples may include:
  - Habitat security
  - Professional consultation
  - GPS collar data
  - Field (boots on the ground) observational data
  - Localized assessment / research / models
  - Camera trap data
  - Citizen science data

C. Project Proposal (Score 0-5)

- Provided comprehensive description of all features and strategies included in the project
- Features and strategies clearly related back to purpose and need
- Included details on dimensions, location, extent, length, etc. for each feature/strategy
- Identified whether proposing new infrastructure and/or retrofit of existing infrastructure

D. Expected Benefits (Score 0-5)

- Clearly articulated benefits regarding safety
- Clearly articulated benefits regarding wildlife connectivity / permeability in the broader landscape
- Utilized relevant data to illustrate benefits, such as:
  - Expert opinion
  - Scientific/practitioner literature, research supporting benefits
  - Clearly articulated change in condition / consequences of the project

IV. IMPLEMENTATION Criteria (Max 20 points)

A. Landowner/community support (Score 0-5)

- Provided project endorsements
- Demonstrated engagement of community working group(s) or partnerships(s)
- Provided evidence of other landowner/community involvement and support
- Demonstrated communication with adjacent and/or directly affected landowners

B. Land protections / Land Use (Score 0-5)

- Discussed and/or referenced land or resource management agency or tribal plans, guidance, or policies conducive to the project
  Examples may include:
  - Project area adjacent to public land, protected land, or private land under conservation easement
  - Planning and growth policies conducive to the project
  - Planned/projected development conducive to the project
  - Project area within State Wildlife Action Plan Focal Areas
  - Project area within SO 3362 MT Action Plan Priority Area
  - STIP projects conducive to or considered in the project
- Plans, guidance, and policies referenced are compatible with proposed project

C. Planned projects / Complementary efforts (Score 0-5)

- Complementary efforts are planned, underway, or have been completed in the vicinity of the project
  - Identified status and implementing entity
- Clearly articulated the extent to which the scope, timing, and impact of these efforts will benefit the success of the proposed project

D. Partnerships in place and role of each partner (Score 0-5)

- Project proposal includes multiple partners
- Clearly identified the role each partner plays(ed) in development, implementation, and/or funding of the project

V. FUNDING Criteria (Max 10 points)

A. Cost estimate (Score 0-5)

- Clearly identified the total cost of project implementation (including development, design, and construction)
- Completed the budget template
- Identified major line items in the proposal
- Used the appropriate average bid prices
- Consulted with and identified professionals for assistance

B. Funding contributions and sources (Score 0-5)

- Clearly described the funding plan
  - Identified sources of funding
  - Identified amount of funding from each source
  - Identified status of funding from each source (secured, pending, possible)
  - Identified timeframes and steps needed to secure pending or possible funding
- Completed the budget template
- Identified remaining gap between cost and revenue, if one exists
- Described opportunities and potential for procurement of additional funding

VI. FEASIBILITY/OPPORTUNITY Criteria (Max 25 points)

A. Engineering / technical feasibility (Score 0-5)

- Clearly described which engineering and/or technical experts (MDT, FWP, Tribal, other) they worked with and what assistance or information they provided in assessing and evaluating the design/construction feasibility of your project proposal.
- Clearly identified red flags that resulted in a change to proposed project features, location, or extents,
- Clearly identified items that may require further investigation and evaluation in the feasibility study phase, or other input that informed the project concept and proposal.
- Documented any endorsements, concerns, or potential drawbacks of your project identified through this consultation.

B. Biological / Ecological feasibility (Score 0-5)

- Clearly described which biologists, road ecologists and/or technical experts (MDT, FWP, Tribal, other) they worked with and what assistance

or information they provided in assessing and evaluating the appropriateness of the project proposal in addressing an identified need.
- Clearly identified other input or suggestions for improvements or modification to the project concept that may assist in more appropriately addressing the challenge, fulfilling the stated purpose and need, identifying the appropriate solution, and supporting the expected benefits associated with the project.
- Documented any endorsements, concerns, or potential drawbacks of your project identified through this consultation.

C. Proposal for construction (Score 0-5)

- Clearly explained who/which entity you are anticipating will administer the bidding and construction of the proposed project (e.g., MDT, local/tribal government, or a private entity).
- If not MDT, included contact information and other pertinent information regarding the experience and ability of this entity to bid and/or construct your project.
- For less complex projects, identified need for an encroachment permit and described if the work will be performed from the adjacent land (outside of MDT R/W) or within MDT R/W and to what extent.

D. Proposal for post-construction monitoring (Score 0-5)

- Clearly articulated a post-construction monitoring plan appropriate to stated purpose and need (conflict/connectivity) to evaluate
  - Expected benefits
  - Lessons learned
  - Unforeseen impacts
  - Adaptive management recommendations
- Clearly identified personnel/entity(ies) responsible for post-construction monitoring
- Clearly identified any novel mitigation strategies or designs, or target species for which there is limited available research regarding use of crossing structures
- Monitoring proposal appears potentially feasible based on the information provided

E. Proposal for short- and long-term maintenance and operation (Score 0-5)

- Clearly articulated a short-term maintenance proposal and responsible entity(ies) for expected day to day maintenance items relevant to features proposed, including schedule and method of inspection

- Clearly identified expected long-term maintenance activities, identified affected features, and the responsible entity(ies)
- Clearly articulated an operation proposal and responsible entity(ies) and identified activities that may require additional agreements
- Maintenance proposal appears potentially feasible based on the information provided