

## OPEN SPACE ADVISORY COMMITTEE AGENDA

**Date:** February 13, 2020, 4:00 PM

**Location:** Currents  
600 Cregg Lane

Missoula, MT 59802

**Members:** Eric Anderson, Kristine Akland, Charles Besancon, DeAnna Bublitz, David Cole, Rob Erickson, Alexis Gibson, Daniel Gundlach, Catherine Ipsen, Edward Monnig, John Smith, Regan Whitworth

To request auxiliary aids or service to participate in this meeting, please contact Jolanda Cummings at 406-552-6238. Please provide at least 48 hours advanced notice or more, so we can make needed arrangements.

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### Pages

#### 1. Administrative Business

##### 1.1 Roll Call

##### 1.2 Approval of Minutes for November 14, 2019, January 6, 2020 and Subcommittee January 23, 2020

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#### 2. Public/Guest Comments

#### 3. Announcements

#### 4. Discussion Items

##### 4.1 Update on Open Space Advisory Committee Project Evaluation Subcommittee

##### 4.2 Presentation Mount Dean Stone Corridor Project

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#### 5. Action Items

#### 6. Future or Held Items

#### 7. Adjournment

## **OPEN SPACE ADVISORY COMMITTEE MINUTES**

**November 14, 2019**

**4:00 PM**

**Currents**

**600 Cregg Lane**

**Missoula, MT 59802**

**Members present:** Eric Anderson, Kristine Akland, Charles Besancon, DeAnna Bublitz, David Cole, Rob Erickson, Daniel Gundlach, Catherine Ipsen, Edward Monnig, John Smith, Regan Whitworth

**Members absent:** Alexis Gibson

**Others present:** Staff Present: Grant Carlton, Jolanda Cummings  
Guest Present: Jim Habeck

### **1. Administrative Business**

#### **1.1 Roll Call**

#### **1.2 Approval of Minutes October 10, 2019 and October 24, 2019**

Correction to the October 10, 2019 and October 24, 2019 Minutes:

Change the heading from COPEN to OPEN.

Catherine Ipsen motioned to approve minutes for October 10, 2019 and October 24, 2019 with amendments.

DeAnna Bublitz seconded the motion. Both meeting minutes were approved with amendments.

### **2. Public/Guest Comments**

Jim Habeck provided to the committee his work history and education in relation to Open Space and Conservation Lands. Jim has been following the committee meetings even when he is unable to attend in person.

### **3. Announcements**

#### **3.1 Update on 2019 Missoula Urban Area Open Space Plan**

Grant Carlton communicated with the Open Space Advisory Committee (OSAC) that on October 21, 2019 the City staff presented the proposed 2019 Missoula Area Open Space Plan to Council and the Board of County Commissioners with the intent to adopt. The City and County will both hold one final public meeting with the objective to adopt the plan by early December. The last draft that OSAC saw was the final draft and there have been no revisions.

#### **3.2 Update on 2018 Open Space Bond Initial Capital Improvement Undertakings**

Grant informed OSAC that on November 4, 2019, Morgan and Grant presented to Council the 2018 Open Space Bond Initial Capital Improvement Undertakings. Council approved the \$775,000 in initial undertakings. It was unanimously approved, city council understands the need to take care of Missoula's open space land and protect the rivers.

OSAC members had questions regarding how lands will be managed and if it is appropriate to use open space funds to manage lands. The committee felt that the City should provide transparent reporting on where the stewardship money is being spent. This discussion prompted the question about Greenough Restoration and how that project is being funded. Grant Carlton didn't feel like he had enough information to answer this question, but stated he will consult appropriate City staff to answer the question at the next OSAC meeting.

### **3.3 Update on Interlocal Agreement between the City and County Related to Expenditures of 2018 Open Space Bond Funds**

Grant Carlton announced there are ongoing negotiations between the City of Missoula and Missoula County. It is nearing the end of the process and Grant will be meeting with the Mayor and the CAO to make final edits. Money is unable to be used on the ground until Interlocal agreement is completed.

Discussion was had if there are issues that are holding up the agreement. Grant informed the committee that there are just wording and timing issues that need to be discussed. This includes defining what the City and County roles will be because the county holds the risk. Grant explained that the county holds the money and then releases the money to the City for approved Open Space projects. The Board of County commissioners need to be assured that these funds are in compliance with the Open Space Bond ballot language and thus are legal use of funds.

## **4. Discussion Items**

### **4.1 Debrief on Dean Stone Phase II Project**

What questions do OSAC members have?

What does OSAC need in order to make a recommendation on the project in January?

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What does OSAC need in order to make a recommendation on the project in January?

Grant Carlton updated the committee on Phase II and the possibility of including part of phase III in the purchase of Phase II. The part that would be included would be the part that is highlighted in purple on the map in Phase III. The potential request from Five Valleys Land Trust for this project is somewhere around \$1 million, and City staff's goal is to ensure the Bond request is appropriate and efficient given the rest of the project's budget and the values the project will provide and protect.

Discussion was had and OSAC members felt that the inclusion of the two Phase III parcels would make sense as the project would give the citizens of Missoula a final destination on the trail. OSAC members wonder why these parcels weren't originally included in Phase II and Grant informed the committee that it was just a product of timing

and finances. Grant also stated that he believes the purchase options are set to expire May 2020.

Members of the committee inquired if there were hold backs from purchasing phase II and Phase III. It was mentioned that Five Valleys Land Trust has not been able to identify owners for the parcels in phase III, and the city at this time doesn't feel that taking on an ownership interest before exploring potential partnerships and other due diligence is appropriate. The City feels the cost is too much to build and maintain the trails, especially without other public or private partners.

During discussion of Mount Dean Stone the committee compiled a list of questions for Pelah Hoyt from Five Valleys Land Trust and the City of Missoula that will be answered at the January 2020 meeting.

- 1) The OSAC committee would like to see a budget and the amount of money Five Valleys Land Trust is requesting.
- 2) What is the total number of acres the city would end up with?
- 3) What is the budget and match for Phase II?
- 4) What is the appraised value?
- 5) What are the budget implications? Has there been a discussion about public/private partnerships? Could this change the intended use?
- 6) What if we end up spending 5 million instead of 3 million? Earmarks?
- 7) Who are the anticipated users and what does trail use look like?
- 8) Are there plans for any extended parking access?
- 9) Are there access easements on Phase III (purple area) and what are the implications for city access?
- 10) What is the time frame for the improvement and trails?
- 11) Who is going to build the trail? If the City is going to be involved in making the trail then should that money be taken out of the Open Space fund earmarked for trail construction? Grant informed the committee that the City Conservation Lands staff thinks that it would be cheaper for the city to use the staff that they have hired to complete a portion of the trails. The quality of trails that the City could build vs an outside organization was discussed amongst the committee.
- 12) What type of wildlife fencing will be used and where will it be located?
- 13) The Committee would like clarity on what projects in the past are multi use and what are the gaps that we should be filling with the bond? Is it wildlife habitat? What have we done in the past and what needs to be done in the future?
- 14) What are the other possibilities for other lands that we would be giving up if we purchased this land?
- 15) What are the different planning possibilities for trails or easements?
- 16) What is the future for other projects?

Grant Carlton spoke about an interest in Marshall Mountain and the OSAC members discussed the possibilities of Marshall being used in a multipurpose way. It was discussed the cost of getting Marshall and the updates that would need to be done to be usable.

Grant Carlton addressed the committee asking if it makes sense to make a decision after being given all the information at the January 2020 meeting? OSAC members would like to allocate time to making a decision. If a decision is unable to be made at the January meeting then they will be able to table the decision to a future meeting. It was discussed to have the agenda for January meeting posted 7 to 10 days in advance so committee members could review documents.

The OSAC committee inquired if projects would be brought to them if the city knew that they wouldn't be able to complete project. Grant told the committee that he isn't able to speak to all projects, but generally, unless there is a big red flag or risk to the City or other stakeholders, he plans on presenting all reasonable projects that are brought to staff. He informed the committee that money is not the only consideration with projects.

#### **4.2 Mount Dean Stone Phase III Project**

##### **Initial Discussion**

Grant Carlton shared with the committee that City is not absolutely averse to owning phase III lands, but the risks, management implications, and costs are major barriers at this time. There are different issues that come with managing the parcels that the city doesn't have experience with as there would be different management needs. The City wants to have more conversation with partners and research historic uses. The City is working with Five Valley's Land Trust to actively find partnerships. This might also be an opportunity to bridge the gap between County and City. Committee members recommended that the Open Space Advisory Committee and the County equivalent meet once a year.

Phase III will also expire May 2020 but Grant shared that this timeline could possibly be extended. The committee conversed on how including the purple area in Phase III really helps as it shows Five Valley Land Trust donors that Five Valleys Land Trust accomplished their goal in saving Mount Dean Stone. The earmarking of funds should be considered to ensure an appropriate amount of Open Space Bond funds are expended.

1) Does it make sense to do Phase III first? Would Phase III serve a group that is currently not catered to?

2) What are the ownership implications for the phase III and can we extend the timeline on Phase III?

3) What are the big concerns if the City doesn't purchase Phase III?

4) If the Nature Conservancy sells it who are the possible purchasers?

John Smith brought up the possibility of inviting Chris Bryant from the Nature Conservancy to discuss the land? OSAC members discussed recent projects completed by the Nature Conservancy and how they are restoring areas to their historic condition.

## **5. Action Items**

### **5.1 Form Subcommittee of OSAC**

Subcommittee will be tasked with creating scoring criteria/project evaluation tools and the related process(es) for analyzing 2018 Open Space Bond projects, including both acquisitions and capital improvement projects.

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Grant Carlton stated that the current process doesn't fully address OSAC's needs and doesn't encompass the 2018 Open Space Bond language, and that he would like to form a Subcommittee that could create new project evaluation tools. This would start in January 2020 and meet through April 2020. This would add two potential extra meetings every month for subcommittee members. The subcommittee would come to a conclusion during these meetings and then bring the ideas to Open Space Advisory Committee (OSAC).

Grant Carlton - I would like to put out a call for volunteers for a subcommittee.

Members that showed interest on being a part of the Subcommittee included Charles Besancon, Edward Monnig, David Cole, DeAnna Bublitz and Kristine Akland.

The date was undecided for January and a Doodle poll was requested. The members would discuss during first meeting what dates would work best for future meetings.

John Smith presented a power point and excel spread sheet that was a project he completed while in school. He discussed that the subcommittee should potentially look at policy and what kind of questions members would like to have answered. The power point showed graphs regarding qualitative Characteristics and Values. This power point was based off of how the committee rated projects in the past. The excel spreadsheet and power point was donated by John Smith to help the subcommittee evaluate projects.

OSAC members felt the subcommittee should look at evaluating distribution during the planning phase. Grant Carlton will provide updated maps and historical data. It was expressed that under-served areas should be looked at when planning.

## **6. Presentation/Discussions/Updates**

None were discussed.

## **7. Future or Held Items**

No items for future or held.

## **8. Adjournment**

Adjournment at 5:42.

Minutes completed by Jolanda Cummings

## OPEN SPACE ADVISORY COMMITTEE MINUTES

January 6, 2020

5:15 PM

DoubleTree by Hilton Hotel Missoula-Edgewater  
100 Madison St, Missoula, MT 59802

**Members present:** Eric Anderson, Charles Besancon, DeAnna Bublitz, David Cole, Rob Erickson, Daniel Gundlach, Catherine Ipsen, Edward Monnig, John Smith, Regan Whitworth

**Members absent:** Kristine Akland, Alexis Gibson

### 1. Administrative Business

#### 1.1 Roll Call

#### 1.2 Approval of Minutes

No Minutes to approve.

### 2. Public/Guest Comments

None

### 3. Announcements

Pizza will be provided

### 4. Discussion Items

1. Introduction of new and current committee and board members
2. Share stories of past and recent accomplishments
3. Discuss possible future goals and projects

There were approximately 20-25 people in attendance.

The annual Holiday Gathering was held at Finn. New and current members met and shared pizza and many stories of past and recent accomplishments. Future goals and possible projects were among the discussions at the gathering.

### 5. Action Items

None

### 6. Presentation/Discussions/Updates

None

### 7. Future or Held Items

None

**8. Adjournment**

Meeting adjourned at 7:15pm



## OPEN SPACE ADVISORY COMMITTEE SUBCOMMITTEE MINUTES

January 23, 2020  
4:00 PM  
Currents  
600 Cregg Lane  
Missoula, MT 59802

**Members present:** Charles Besancon, David Cole, DeAnna Bublitz, Kristine Akland, Daniel Gundlach

**Members absent:** Edward Monnig

### 1. Administrative Business

#### 1.1 Roll Call

### 2. Public/Guest Comments

### 3. Discussion Items

One meeting outside OSAC per month and there could be more if committee members deem necessary. Chair might help facilitate the subcommittee meetings and compile and submit reports to full Committee and Council. Grant is hoping to finish the process by spring. Reworking and application documents. Phase 1, Phase 2 and provide transparency and objectivity. Helps us evaluate our projects.

#### 3.1 Road map and timeline for the reworking of OSAC's Project Evaluation Process

Highlight changes related to the passing of the 2018 Open Space Bond

Committee members discussed the timeline of the subcommittee meetings and what role the committee chair will serve. The committee will conduct one meeting per month outside the regularly scheduled Open Space Advisory Committee (OSAC) meeting. These meetings will occur every month until process is complete with a target end date in the spring. This committee will rework and update the current project evaluation process.

#### 3.2 Current OSAC process for submission, evaluation and recommendation of open space projects

OSAC's thoughts on current project submission and evaluation process

Grant Carlton handed out to the committee the current Open Space Advisory Committee's Lands Selection Process and the tentatively proposed update process for evaluating Open Space Undertakings. Grant highlighted the changes related to the passing of the 2018 Open Space Bond. The primary changes are the addition of capital improvement projects as a permissible use of Open Space Bond funds and the adoption of the 2019 Missoula Urban Area Open Space Plan. It was noted that while going through the process the committee should consider funding earmarks.

The committee conversed about current evaluation process and tools and how past projects were presented to the committee. Committee members voiced how the current Open Space Advisory Committee's Lands Selection Process wasn't strictly followed and that the projects were presented to OSAC committee by the former Open Space Acquisitions Attorney. Grant explained that he would like to create a process that the committee could use so the public and council would be able to see how the committee reached a decision based on the Open Space

### **3.3 Applicant project submission process and checklist moving forward**

Grant Carlton presented his proposed updated process for evaluating Open Space Undertakings. The process would consist of Phase 1 and Phase 2. Phase 1 would consist of OSAC and staff evaluating the high level attributes and conformity with bond language of a project, if the project was acceptable it would then go into phase 2. Committee would like flexibility for field visits that these could occur in either phase. Committee members inquired about a GIS system that would allow them to make more informed decisions based on cornerstones and current open space land. Grant Carlton discussed phase 2. Phase 2 would have more robust materials with specific details of the project, budget, timeline and open space values of project.

### **3.4 OSAC process for evaluation and scoring of projects moving forward**

How to incorporate capital improvement projects.

Grant Carlton will create a list of questions based on the project type- conservation easements, capital improvements or acquisitions, then OSAC would answer the questions using a scoring system rating related project values as high, medium, or low. Overall this would create a process for each project and would provide documentation for how the committee evaluated the project. The committee also inquired about providing a check box for each category and then having questions in line if a box was checked.

Grant Carlton asked the committee to look at the Open Space plan and to acquaint themselves with the public's desires based on public survey results and other information in the Plan.

## **4. Action Item**

### **4.1 Choose Chair for Subcommittee**

Kristine Akland volunteered to be Chair for Subcommittee.

The committee vote yes.

### **4.2 Choose Vice Chair for Subcommittee**

DeAnna Bublitz volunteered to be Vice Chair.

The committee vote yes.

## **5. Future or Held Items**

Evaluation on Capital Projects.

Committee will meet on February 20th from 4-6.

**6. Adjournment**

Meeting 5:52

## Mount Dean Stone Corridor Fee Acquisition Proposal



Application for Acquisition Funding  
Missoula Open Space Bond Program

Submitted by:



120 Hickory Street, Suite B  
Missoula, MT 59801  
406-549-0755  
[pelah@fvlt.org](mailto:pelah@fvlt.org)



120 Hickory Street, Suite B  
Missoula, MT 59801  
406.549.0755 fvl.org

February 5, 2020

Missoula Parks and Recreation  
Open Space Advisory Committee  
Attn: Grant Carlton  
600 Cregg Lane  
Missoula, MT 59802

**Re: Mount Dean Stone Corridor Acquisition Proposal**

Dear Staff and Committee Members,

The Mount Dean Stone Corridor will open over five miles of new trail route across 350 acres of proposed conservation land. The proposed trail will be broadly accessible for beginners to those with more experience and will offer a shady respite in a warming world. It will expand the limited places where the City's recreation programming can give people of all ages the opportunity to grow, experience, learn and enjoy the natural world around them. From the Corridor members of the public can enjoy inspiring views in all directions and experience the sights and sounds of a changing forest as they move up Mount Dean Stone. Delivering both physical and mental health benefits the proposed conservation lands will provide an outstanding recreational corridor where people can get exercise and connect with each other in nature.

The Mount Dean Stone Corridor includes 350 acres of land that Five Valleys Land Trust proposes to transfer to the City of Missoula to enhance the Conservation Lands system. The Corridor is adjacent to the South Hills Spur and will expand its conservation footprint to establish Mount Dean Stone as a community open space anchor serving the south side of Missoula, as Jumbo, Sentinel, and the North Hills serve as open space icons in other parts of Missoula. Five Valleys respectfully requests \$925,000 in Open Space Bond and Open Space Estate Gift funding which Five Valleys will match with a \$1.4 million donation.

Located in an area prioritized for conservation by the 2019 Missoula Urban Area Open Space Plan, the Mount Dean Stone Corridor helps meet Missoula's health, wellness, and social equity interests while proactively planning for the recreation and open space infrastructure needs of our growing community.

Sincerely,

A handwritten signature in blue ink, appearing to read "Pelah", followed by a stylized flourish.

Pelah Hoyt  
Lands Director



Board of Directors:

Mary Babson • David Banks • Jim Brown • Ken Burd • Jim Cusker • Mary Lynn Eiseman • Julie Fogarty • Mike Foote • Allan Frankl  
Denny Iverson • Kathy McAllister • Jocelyn Lane • John Rimel • Jeff Roth • Kristin Tessman • Pam Volkmann • Rick Wishcamper

## Landowner and Agency or Organization Identification:

Landowners: Five Valleys Land Trust  
120 Hickory Street, Suite B  
Missoula, MT 59801

Sponsoring Organization: same as above

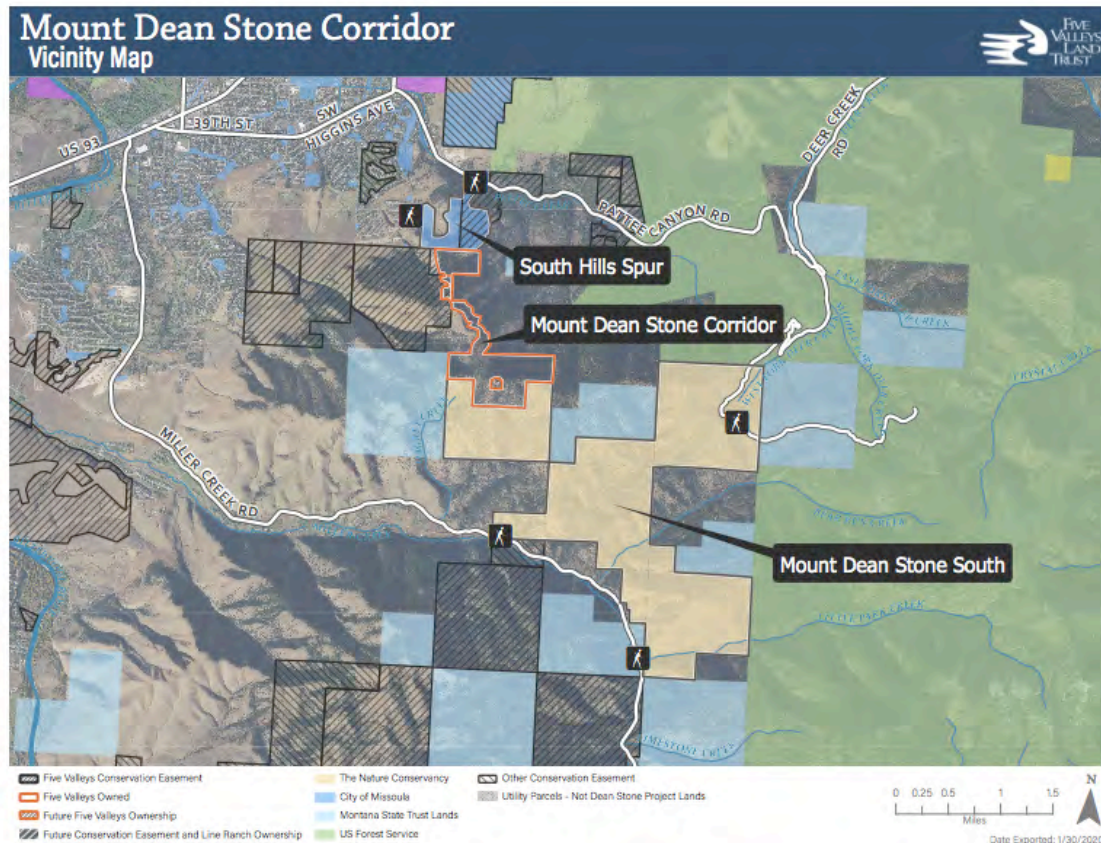


Figure 1: Vicinity map of Mount Dean Stone Corridor southeast of Missoula

## 1. Site Description

### a) Size and location of the property

The Mount Dean Stone Corridor ("the Corridor") consists of seven connected properties totaling 350 acres of land. Located adjacent to the City of Missoula-owned South Hills Spur, the Corridor stretches up the north facing slope of Mount Dean Stone and around the top of the mountain. The summit of Mount Dean Stone is used for communication facilities and is not included in this proposal. The Corridor connects to 2,500 acres of The Nature Conservancy-owned land that stretches south to Miller Creek and east to the West Fork of

Deer Creek (labeled as Mount Dean Stone South on the Vicinity Map above). The Corridor is located within an Open Space Cornerstone, as identified in the 2019 Missoula Urban Area Open Space Plan (see Figure 3. Corridor Location in Open Space Cornerstone Map).

b) Conservation proposal for the Property

Five Valleys proposes to transfer the Corridor properties to the City of Missoula for inclusion in the Conservation Lands system. In coordination with the City Parks and Recreation Program, Five Valleys will develop and construct the majority of the recreational trail on the Corridor prior to transferring the property to the City. Five Valleys would like to transfer the Corridor to the City of Missoula in the summer or fall of 2020. If the City approves this proposal, the trail could be opened to the public in the Spring of 2021.

c) Property characteristics

The seven properties that make up the Corridor consist of 17 different parcels of land, including a parcel that is approved for a 10-lot residential subdivision directly above the South Hills Spur (see Figure 5. Lower Corridor Property Subdivision Plat). Five Valleys Land Trust (Five Valleys) currently owns six of the Corridor properties. Five Valleys is in the process of acquiring the seventh property through a land exchange with an adjacent landowner that involves amending the Line Ranch conservation easement and relocating a boundary line between the properties. The Line Ranch conservation easement was supported with Open Space Bond funds in 2007. In coordination with the City and County of Missoula, Five Valleys is amending the Line Ranch conservation easement to expand its size by approximately 11 acres and to secure public access across a 14-acre portion of the property. The land exchange will be completed this spring, so Five Valleys will own all seven properties prior to their potential sale to the City of Missoula.

The Corridor includes a grassland ridge above the South Hills Spur and upland coniferous forest that changes in character across the Corridor in response to slope, disturbance history, and increases in elevation. The forest opens up on the Corridor near the top of Mount Dean Stone into an open subalpine meadow overlooking the Missoula Valley, Pattee Canyon, and the northern Bitterroot.

d) Property improvements

As mentioned above, the lower portion of the Corridor includes a 10-lot residential subdivision that was being prepared for development prior to Five Valleys' acquisition of the property. This lower property contains a developer road that was constructed to access the planned house sites. This lower property also contains a buried electric line, three electrical transformer boxes, and two wells.



This spring Five Valleys will use electricity on this lower property and a portion of the well water associated with the property to install a water development for agricultural purposes on adjacent conservation land that is not included in this proposal. The remaining portion of this well water allocation would be transferred to the City along with the Corridor property. Five Valleys will also install a wildlife friendly fence along the lower portion of the Corridor to separate public recreational use from agricultural use on the adjacent property.

The upper portions of the Corridor were logged over the last 80 years and a portion of the Corridor was burned during the 1977 Pattee Canyon Fire. A network of old roads related to this forestry work crosses the upper portion of the Corridor. Thick vegetation has grown over most of these roads, making them impassable to vehicles. Some segments of these old roads will be used for portions of the public trail. One improved dirt road is located on the upper portions of the Corridor that is used to access the communication facilities at the top of Mount Dean Stone. The public trail will cross this road in two places, similarly to the Sousa and Barmeyer trail road crossings, except that the communication facility road likely sees less vehicular use than those lower crossings.

e) Other protected land in the vicinity of the Property

The Corridor builds on decades of successful conservation work surrounding the Missoula Valley. It lies south of Mount Sentinel which was protected in phases beginning with the state's first Open Space Bond and later with Land and Water Conservation Funds. Seven families have protected important portions of Pattee Canyon to the east with conservation easements. In the upper portions of the canyon, the US Forest Service provides public access and protects habitat in the Pattee Canyon Recreation Area.

In the immediate vicinity, the Corridor is bordered to the south by 173-acres of City Conservation Lands on the South Hills Spur. Directly to the west over 1,000 acres of working ranchland and wildlife habitat are protected with conservation easements.

South and east of the Corridor the Mount Dean Stone South lands include 2,500 acres of land that The Nature Conservancy acquired from Plum Creek Timber company as part of the Montana Legacy Project. Five Valleys is working with The Nature Conservancy and other community partners to realize the conservation vision for the Mount Dean Stone South lands which will include securing public recreational access, habitat conservation, and protecting the property from subdivision and residential development. Five Valleys expects to complete the conservation of the Mount Dean Stone South lands by December of 2021.



The Mount Dean Stone project will help complete a 180-degree arc of publicly accessible conservation lands around the Missoula Valley to provide places for people to connect with each other and the natural world close to home.

## **2. Public Access/Recreational Trails**

The Corridor provides significant public access and recreational trail opportunities. Trails coming from the Sousa and Barmeyer Trailheads could be extended up through the Corridor and around the top of the Mount Dean Stone, providing over five miles of new recreational trail route for the citizens of Missoula. Five Valleys designed the proposed trail and real estate acquisitions together to ensure that the proposed route provides exceptional experiences for the recreating public and reduces impacts on adjacent private land and natural values. Five Valleys will construct the majority of this trail prior to transferring the land to the City and is donating the cost of its design and construction.

The working name for this trail is the High, Wide, and Handsome Trail in honor of Montana's literary heritage and conservation ethic which were both exemplified by writer Joseph Kinsey Howard and his seminal history of Montana by the same name. If the City acquires the Corridor, the City will follow its trail naming policy in which the name High, Wide, and Handsome may be considered.

The High, Wide, and Handsome Trail on the Corridor will provide opportunities for members of the public to connect with nature and improve their physical and mental health. It will offer outstanding views of the Missoula Valley, Pattee Canyon and up the Bitterroot Valley. On a clear day, the public can see up the Blackfoot to the Scapegoat Wilderness from the Corridor. With an elevational gain of 1,300 feet, the trail will provide the public with opportunities to observe how the forest changes across a large elevational gradient. The High, Wide, and Handsome Trail will be built at a moderate ~8% grade to provide recreational opportunities for members of the public with a wide range of abilities, from beginners to experts. Five Valleys is coordinating with the City Conservation Lands program to ensure that the trail meets recreational needs while minimizing impacts on other conservation values, reducing long-term maintenance costs, and aligning with trail infrastructure and management on the South Hills Spur. Consistent with South Hills Spur infrastructure and management, the trail will be suitable for both pedestrians and bicycles.

Five Valleys is working with partners to develop other trails on the Mount Dean Stone South portion of the project that will connect with the High, Wide, and Handsome Trail as shown on the attached Draft 2020 Trails Proposal Map (Figure 4). Last month, Five Valleys applied for a State Recreational Trails Program grant to construct the proposed House of Sky Trail connecting the High, Wide, and Handsome Trail with the upper Pattee Canyon area.

The Conservation Lands Program is evaluating other management considerations for the Corridor and will propose a management plan to the Conservation Lands Advisory Committee, Park Board, and City Council consistent with City policy.

### **3. Wildlife Habitat/Native Plant Communities**

The Corridor provides healthy grassland habitat and a diversity of upland coniferous forest habitat at different elevations and in various successional stages. In the lower portion of the Corridor, Five Valleys completed a forest health and habitat improvement project in 2019 aimed at fostering old growth conditions, retaining snags and creating new broken top snags, and opening up the forest floor. The middle portions of the property were burned in the 1977 Pattee Canyon Fire and have grown into dense even-aged stands dominated by Douglas-fir, larch, and subalpine fir. The upper portions of the Corridor open into a wet meadow on the north aspect and into open forest and grassland habitat on the south facing slope interspersed with rocky areas.

The combination of open grasslands and a diversity of coniferous forest on the Corridor provides foraging habitat and cover for a variety of wildlife species. Audubon Society bird surveys on the Corridor found a strong representation of breeding migrant songbirds including six warbler species, warbling and Cassin's vireos, and Swainson's and hermit thrushes among others (see Attachment 1. Bird Survey Results for Middle and Upper Corridor). A night flight migration study on the adjacent Line Ranch indicates that the area is used by many other species during periods of bird migration. The Corridor gets some use by elk, but recent data from Montana Fish, Wildlife, & Parks North Sapphires Elk Study and historic data indicate that the Corridor does not provide critical winter or summer range habitat for elk. The Corridor provides habitat for red-tailed hawk, dusky grouse, and moose, and potential habitat for other species such as western skink, voles, long-tailed weasel, mule deer, black bear, mountain lion and bobcat. The conservation value of the grassland and forested habitat on the Corridor is enhanced by its proximity to extensive grassland and forested habitats that are protected on adjacent lands.

### **5. Water Quality**

Although streams are not located on the Corridor, conserving it will provide water quality benefits. Protection of the Corridor will reduce negative impacts on water quality associated with development by preventing septic systems and impervious surfaces across the property. This will allow the Corridor to maintain its ability to filter and store water. Under conservation focused ownership, the City will be able to improve forest and grassland health which will in time increase the Corridor's ability to provide ecosystem services such as improving water quality.

## **6. Scenic and Historic Value**

The scenic value of the Corridor can be enjoyed by the citizens of Missoula from across the valley and from many of the most frequently visited Conservation Lands. Together with the North Hills, Mount Jumbo, and Mount Sentinel, the Mount Dean Stone Corridor will protect a 180-degree arc of scenic beauty around Missoula. This arc of conservation visually represents how deeply the citizens of Missoula value open space. It forms the foundation of the unique sense of place that defines Missoula and contributes to the high quality of life here.

## **7. Other Unique/Exceptional Values**

The Corridor enhances the conservation value of previous Open Space Bond investments in the South Hills Spur and the Barmeyer and South Hills conservation easements by expanding public access, habitat protections, and the ecosystem services these open space lands provide. The Corridor is forward thinking, as well, because it sets the stage for additional trail connections and habitat protection on Mount Dean Stone South lands to the south and east. In the years ahead, the High, Wide, and Handsome Trail will provide trail connections to the upper Pattee Canyon area and eventually to Miller Creek as shown on the Draft 2020 Trails Proposal Map (Figure 4). Conservation of the Corridor will build momentum for the conservation of the Mount Dean Stone South lands and make their eventual conservation more likely.

## **8. Public Values**

The Corridor proposal would support the goals of city, county, and state plans and policies, as described below.

### **a) Missoula City and County**

#### **Missoula Urban Area Open Space Plan (City-County 2019 Update):**

The Corridor proposal meets the goals of the Open Space Plan by conserving natural systems and providing recreational opportunities. The Open Space Plan envisions a connected open space system, with access to a park, trail, open space land, natural area or recreation area available in every neighborhood. The Open Space Plan prioritizes certain geographic areas in and around Missoula for conservation investment through the delineation of Open Space Cornerstones. The Corridor is located within an Open Space Cornerstone on the south east side of Missoula (see Figure 3. Corridor Location in Open Space Cornerstone Map).

As part of the open space planning effort, the City and County conducted a statistically valid county-wide survey of residents. That survey found strong support for the type of open space conservation that the Corridor will provide including the 84% of respondents who most want natural areas/wildlife habitat and dirt trails for hiking, biking, and running and the 90% of residents who value open space for

providing natural areas for recreation and for protecting land for wildlife habitat and environmental reasons.

The Corridor will provide broadly accessible recreational opportunities in nature which meets the Open Space Plan's health and wellness related goals. According to the Plan:

Open spaces encourage walking, cycling, and other exercise, which is recognized as improving many aspects of health. Studies show that contact with nature offers a wide range of medical benefits, including lower blood pressure and cholesterol levels, enhanced survival after a heart attack, and lower self-reported stress. Research suggests that exercise is more beneficial, leading to enhanced tranquility, and more relief of anxiety and depression when it occurs in natural settings rather than along urban streets.

In addition to these physical and mental health benefits, the Open Space Plan recognizes that:

through recreation in shared open spaces, social interaction between neighbors fosters strong ties between social groups. Continued exposure to nature deepens one's sense of place and belonging which inspires environmental stewardship.

The Corridor also provides social equity benefits by expanding the limited areas where City Parks and Recreation can provide programing, including educational opportunities for children and adults, which can improve academic achievement, student health, science skills, and help cultivate leadership qualities.

*Our Missoula, City Growth Policy (2015):*

The Growth Policy recognizes that a primary, character-defining feature of Missoula is its connection with natural and scenic resources and that outdoor recreation is an essential part of the Missoula community's character and way of life. The Corridor proposal supports Missoula's efforts to provide a safe and healthy quality of life through accessible open space conservation and recreation programs.

*Climate Ready Missoula (City County January 2020 Draft):*

The Corridor proposal helps meet the goals and strategies prioritized in the City and County's draft Climate Ready Missoula plan to address the risks of climate change. The Climate Ready plan recognizes the importance of protecting habitat and open space to balance competing land uses in response to climate change. It recommends restricting new development in high wildfire hazard areas, which include the Corridor lands, to reduce the vulnerability of buildings to wildfire. The Corridor proposal further meets the Climate Ready goals of preserving water quality and water storage by prohibiting impervious surfaces associated with residential development.

*Missoula County Community Wildfire Protection Plan (2018)*

The Missoula County Community Wildfire Protection Plan recommends using land conservation tools such as the open space bond to buffer developed areas from

wildfire. The Corridor proposal is consistent with the County's Wildfire Protection Plan by utilizing Open Space Bond funds to reduce residential development and protect open-space land in an area that the County has designated as having a high to very high risk of wildfire. Eliminating residential development on 350 acres of high wildfire risk lands adjacent to Missoula reduces risks to humans and structures. Under City ownership land managers would also have the opportunity to further reduce wildfire risk on these lands through appropriate forest management.

#### **b) State**

Montana's Statewide Wildlife Action Plan (2015) -- Montana Fish, Wildlife, and Parks:

The montane grassland habitat on the lower portion of the Corridor is prioritized for conservation as a Tier 1 Terrestrial Community Type of Greatest Conservation Need in Montana's Statewide Wildlife Action Plan. The Wildlife Action Plan recommends employing land acquisitions and conservation easements to prevent further habitat fragmentation and to preserve the natural habitat function of these community types of Greatest Conservation Need. Conservation of the montane grassland on the Corridor compliments the protection of this important habitat on the South Hills Spur.

### **9. Funding Proposal**

The Mount Dean Stone Corridor acquisition project is valued at over \$2,349,000. Five Valleys is requesting \$925,000 in Open Space funding from a combination of the 2018 Open Space Bond and the Open Space Estate Gift, which are described in the City Open Space Ordinance as Conservation Bond and Open Space Funding, respectively. (The specific requested allocation between the Open Space Bond and Estate Gift will be determined in coordination with City staff.) Five Valleys will match this request by donating \$1,054,147 in real estate value, transaction costs, and trail development costs. Five Valleys operational contribution to the project is \$370,000 and includes over four years of work to acquire the properties, assess and improve forest health, design the trail, and work collaboratively with community members and neighbors to bring forward a proposal that meets community needs while being a good neighbor to adjacent private landowners.

According to independent appraisal reports and a market analysis, six of the seven Corridor properties are together valued at \$1,737,000, however the appraisal for one property has not been completed yet. This final property appraisal will increase the overall appraised project value, but it will not increase the funding request. See the Proposed Budget in Table 1 below.

Transaction costs for the Corridor are higher than some other acquisition projects, because piecing the Corridor together required seven separate acquisitions, a boundary line relocation, the creation of utility parcels, a land exchange, the resolution of several access disputes, and costs to cure such as fencing. Table 2 below details these transaction costs.

**Table 1: Mount Dean Stone Corridor Budget**

| <b>Mount Dean Stone Corridor Expenses</b>                      |                   |                    |
|--|-------------------|--------------------|
| Minimum Real Estate Value (not including one property value)   |                   | \$1,737,000        |
| Acquisition transaction costs                                  |                   | \$162,147          |
| Trail donation (not including seeding, weed spraying, & signs) |                   | \$80,000           |
| Five Valleys operational contribution                          |                   | \$370,000          |
| <b>Total Expenses</b>  |                   | <b>\$2,349,147</b> |
| <b>Open Space Request</b>                                      | <b>Percentage</b> |                    |
| 2018 Open Space Bond*  | TBD%              | \$ TBD             |
| Open Space Estate Gift*  | TBD%              | \$ TBD             |
| Minimum donated Value (Real Estate & Trail)                    | 45%               | \$1,054,147        |
| Five Valleys operational contribution                          | 16%               | \$370,000          |
| <b>Total</b>   | <b>100%</b>       | <b>\$2,349,147</b> |

**\*Total requested City funds = \$925,000 (39% of expenses)**

|   |         |
|---|---------|
| Open Space Bond cost per acre for Corridor: | \$1,929 |
| City Open Space Bond average cost per acre: | \$1,388 |

**Table 2: Transaction Costs for Mount Dean Stone Corridor**

| <b>Acquisition Associated Transaction Costs</b> |                  |
|---|------------------|
| Attorney fees                                   | \$30,821         |
| Appraisal fees (for 5 appraisals)               | \$10,000         |
| Professional fees*                              | \$110,576        |
| Cost to cure (fencing)                          | \$10,750         |
| <b>Total Expenses</b>                           | <b>\$162,147</b> |

\* Includes boundary line relocation, creation of utility parcels, water development, recording & closing fees, contaminant assessments, and other professional services

## 10. Maps and Attachments

Figure 1. Mount Dean Stone Vicinity Map

Figure 2. Mount Dean Stone Corridor Map

Figure 3. Corridor Location in Open Space Cornerstone Map

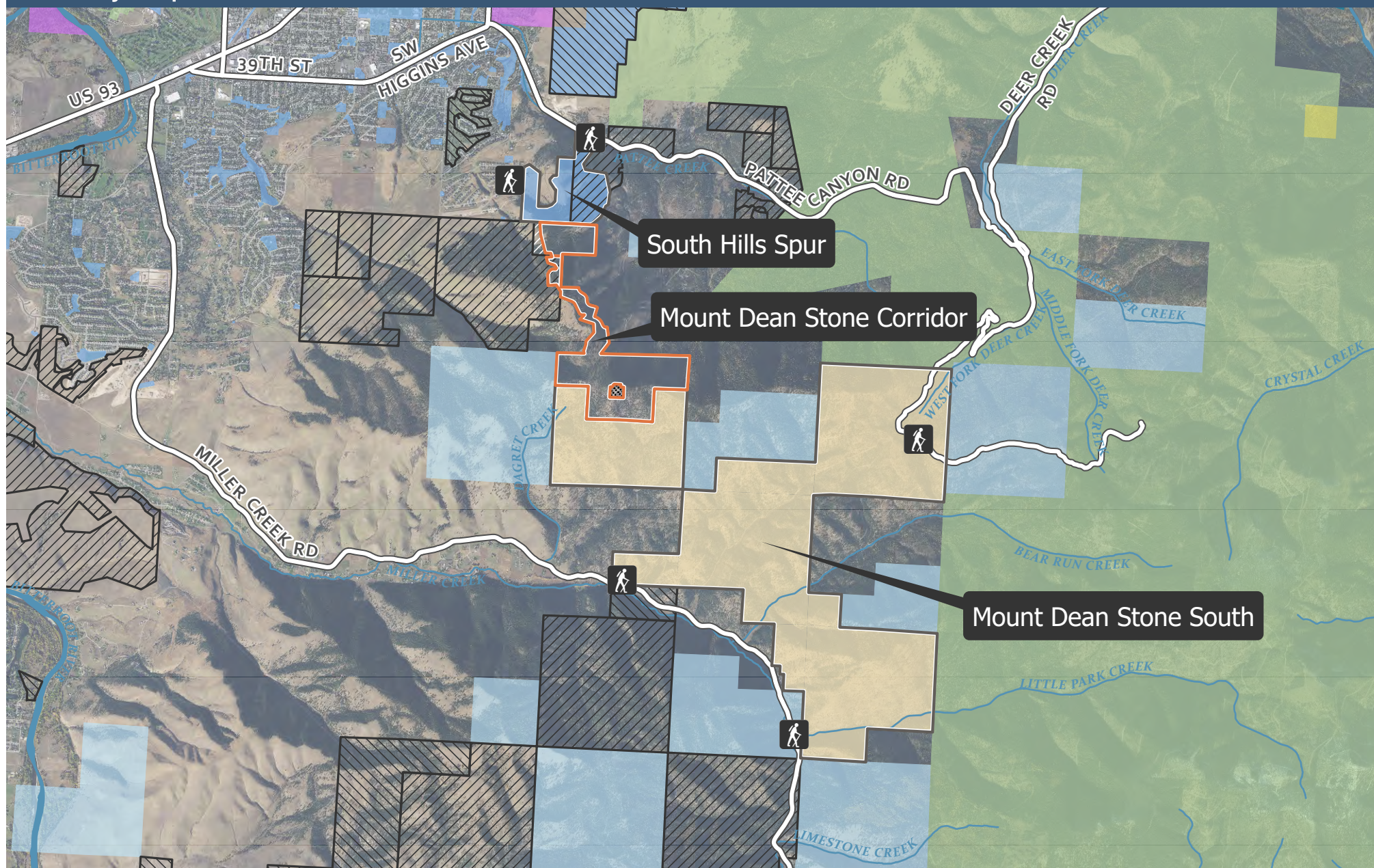
Figure 4. Draft 2020 Trails Proposal Map

Figure 5. Lower Corridor Property Subdivision Plat

Attachment 1. Bird Survey Results for Middle and Upper Corridor



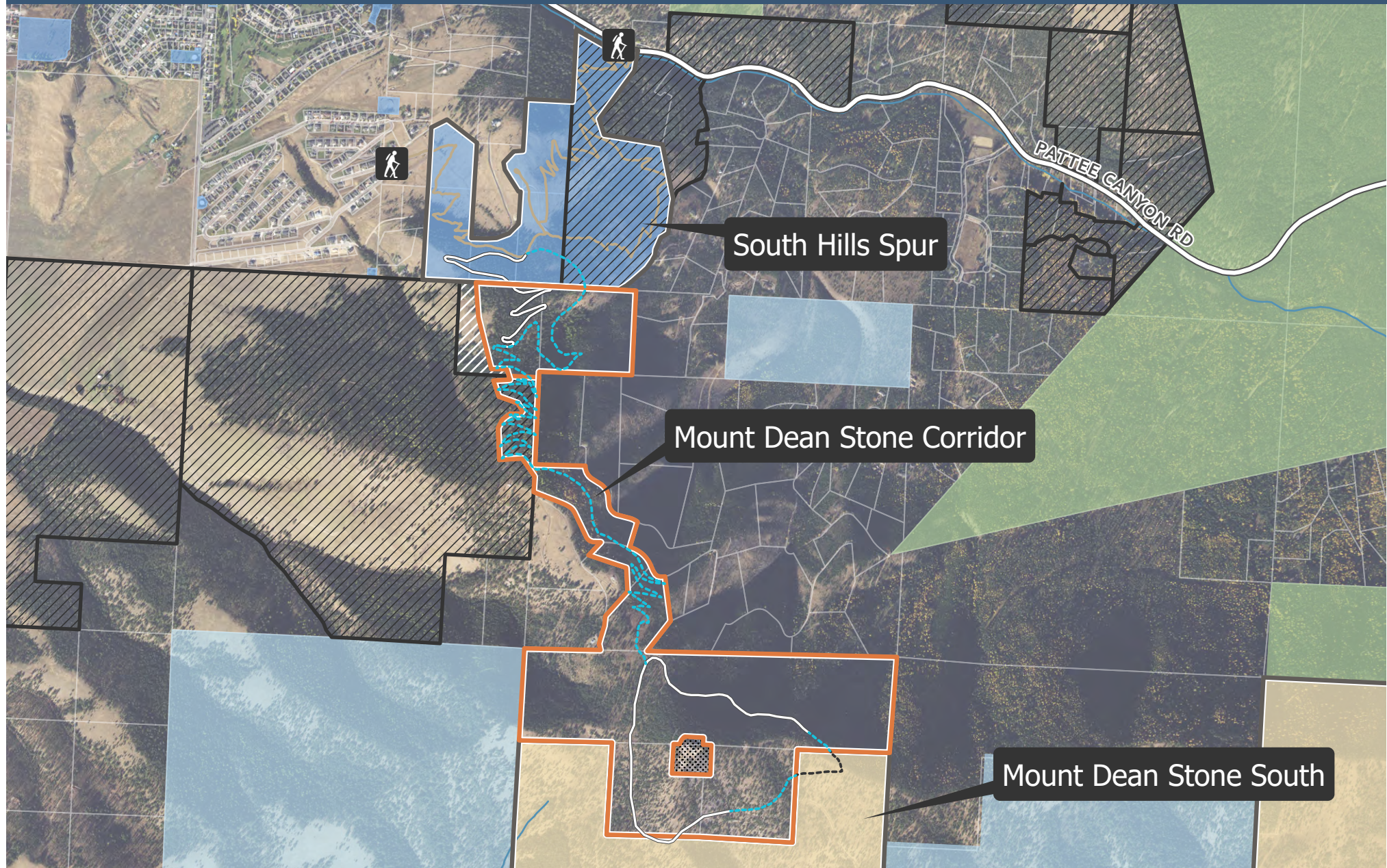
# Mount Dean Stone Corridor Vicinity Map



- Five Valleys Conservation Easement
- Five Valleys Owned
- Future Five Valleys Ownership
- Future Conservation Easement and Line Ranch Ownership
- The Nature Conservancy
- City of Missoula
- Montana State Trust Lands
- US Forest Service
- Other Conservation Easement
- Utility Parcels - Not Dean Stone Project Lands



# Mount Dean Stone Corridor

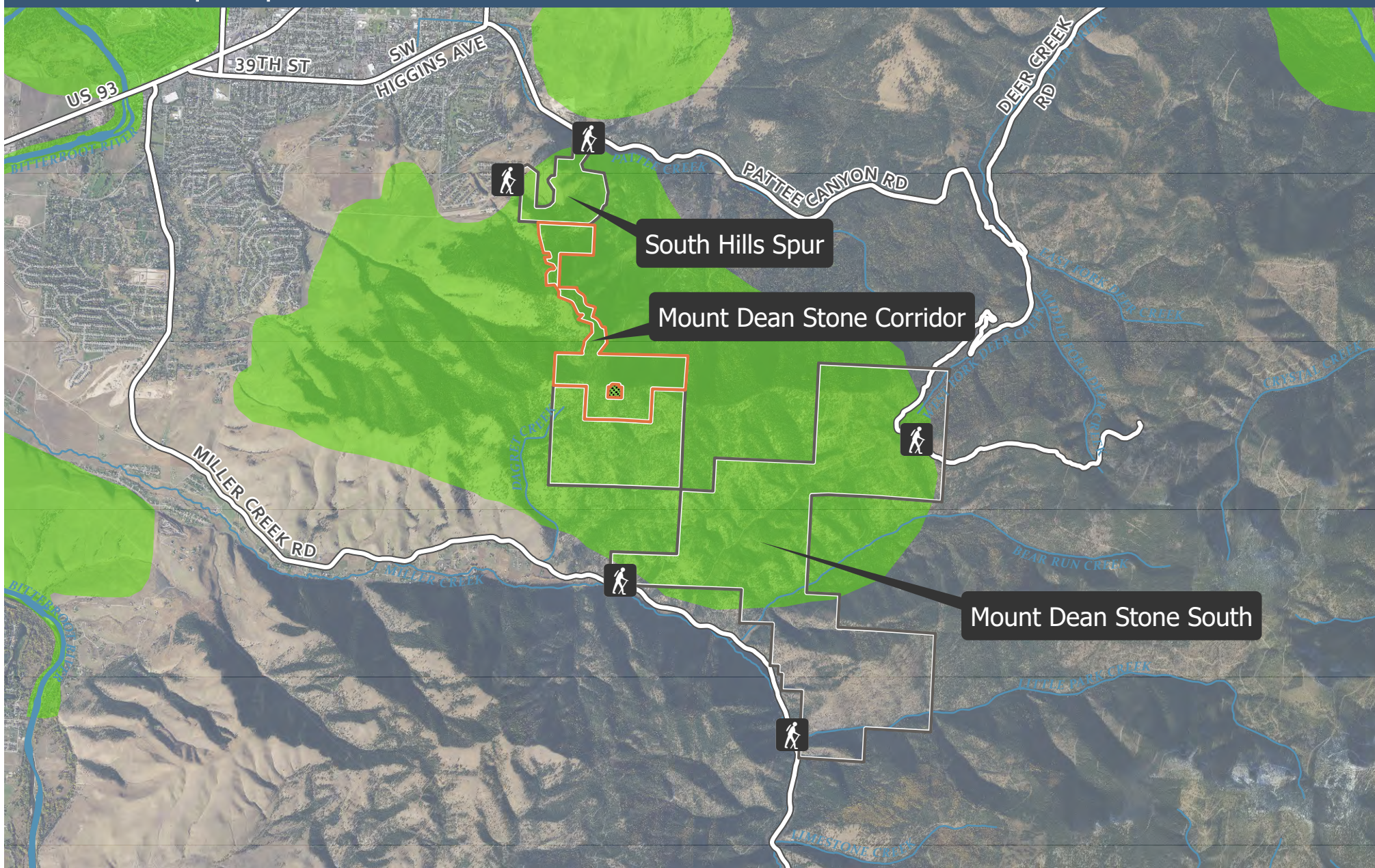


- |   |                           |  |  |
|---|---------------------------|--|--|
| Five Valleys Conservation Easement                    | The Nature Conservancy    | Existing Trail   | Utility Parcels-Not Dean Stone Project Lands |
| Five Valleys Owned                                    | City of Missoula          | Proposed High, Wide, & Handsome Trail                                | Existing Road                                |
| Future Five Valleys Ownership                         | Montana State Trust Lands | Proposed High, Wide, & Handsome Trail on the Nature Conservancy Land |  |
| Future Conservation Easement and Line Ranch Ownership | US Forest Service         |  |  |



# Mount Dean Stone Corridor

## Location in Open Space Cornerstone

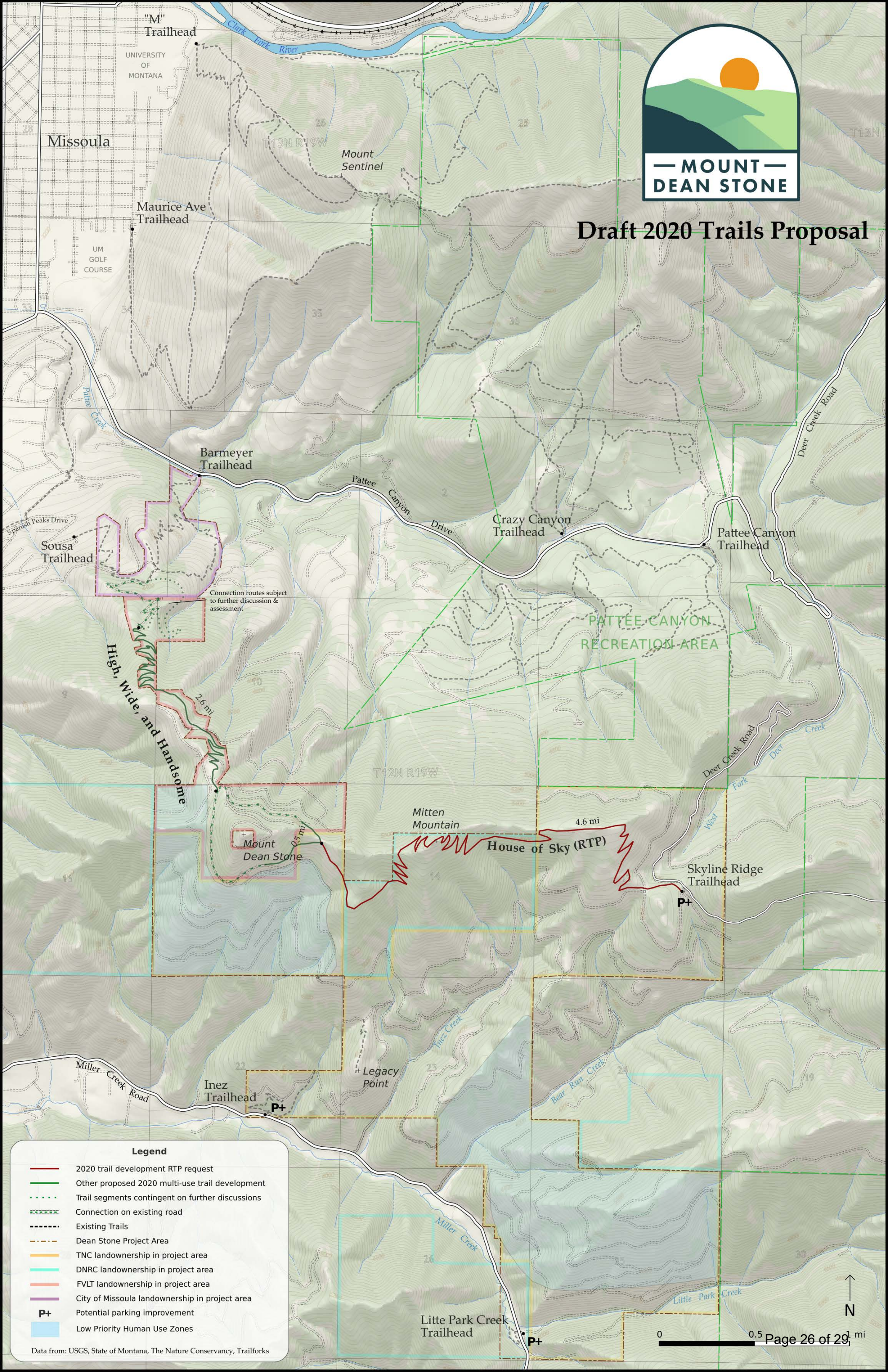


- Open Space Cornerstones
- Utility Parcels - Not Dean Stone Project Lands





# Draft 2020 Trails Proposal



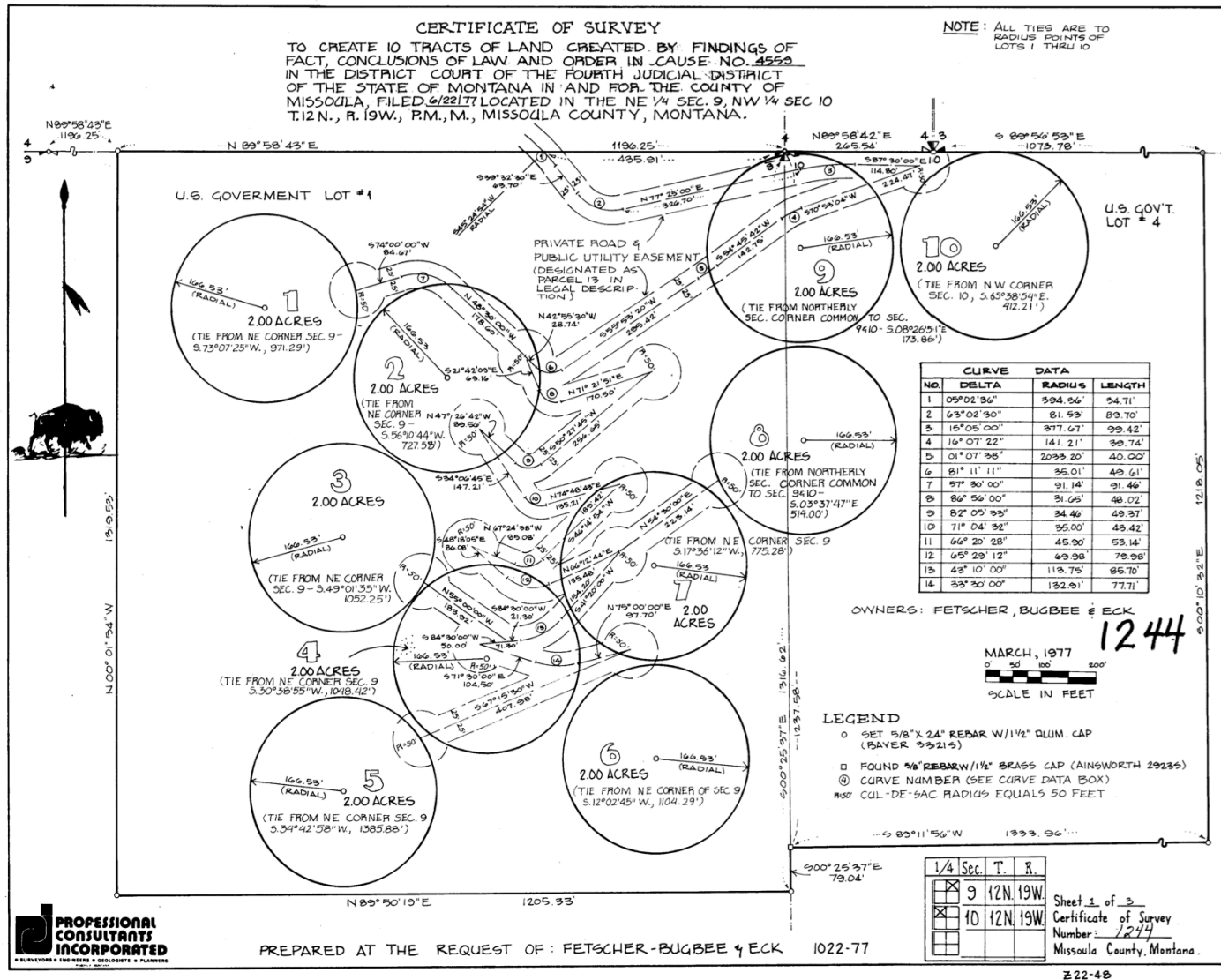
### Legend

- 2020 trail development RTP request
- Other proposed 2020 multi-use trail development
- Trail segments contingent on further discussions
- Connection on existing road
- Existing Trails
- Dean Stone Project Area
- TNC landownership in project area
- DNRC landownership in project area
- FVLT landownership in project area
- City of Missoula landownership in project area
- P+ Potential parking improvement
- Low Priority Human Use Zones

Data from: USGS, State of Montana, The Nature Conservancy, Trailforks



Figure 5. Lower Corridor Property Subdivision Plat



## Attachment 1. Bird Survey Results for Middle and Upper Corridor Properties

Conducted by Five Valleys Audubon Society

Location Name: Dean Stone Corridor: Lyon, Papa Chung, Saddle, and Star Quilt Properties

Date: 6-26-19 Start Time: 0845 Duration: 3.2 hours

Observers:

Lyon, Papa Chung: Andrea Stierle, Paul Hendricks, Vick Applegate, John Brock, Brian Williams

Vertical Bridge, Hickman: Rose Leach, Cathy Ream, Brad Johnson, Roger Hogan, Jim Brown

Weather: sunny, temperature 50-60 degrees

| Species                | Number                      |                               | Status |
|------------------------|-----------------------------|-------------------------------|--------|
|                        | Lyon, Papa Chung Properties | Saddle, Star Quilt Properties |        |
| Calliope Hummingbird   | 3                           |                               | b      |
| Hairy Woodpecker       |                             | 1                             | b      |
| Northern Flicker       | 3                           | 1                             | b      |
| Western Wood Pewee     |                             | 1                             | b      |
| Dusky Flycatcher       |                             | 1                             | b      |
| Warbling Vireo         | 9                           |                               | b      |
| Cassin's Vireo         | 10                          | 2                             | b      |
| Gray jay               | 2                           |                               | b      |
| Steller's Jay          | 6                           | 2                             | b      |
| Common Raven           | 2                           | 4                             | t      |
| Black-capped Chickadee | 3                           |                               | b      |
| Mountain Chickadee     | 6                           | 3                             | b      |
| Red-breasted Nuthatch  | 7                           | 4                             | b      |
| Golden-crowned Kinglet |                             | 2                             | b      |
| Ruby-crowned Kinglet   | 19                          | 8                             | b      |
| Mountain Bluebird      | 6                           | 4                             | b      |
| Townsend's Solitaire   | 2                           | 2                             | b      |
| Veery                  | 3                           |                               | b      |
| Swainson's Thrush      | 2                           | 2                             | b      |
| Hermit Thrush          | 15                          | 6                             | b      |
| American Robin         | 1                           | 2                             | b      |
| Orange-crowned Warbler | 7                           |                               | b      |
| Nashville Warbler      | 1                           | 2                             | b      |
| MacGillivray's Warbler | 7                           |                               | b      |
| Yellow Warbler         | 7                           |                               | b      |
| Yellow-rumped Warbler  | 15                          | 8                             | b      |
| Townsend's Warbler     |                             | 1                             | b      |
| Spotted Towhee         | 6                           |                               | b      |
| Chipping Sparrow       | 36                          | 11                            | B      |
| Dark-eyed Junco        | 10                          |                               | b      |
| Western Tanager        | 7                           | 7                             | b      |
| Black-headed Grosbeak  | 2                           |                               | b      |

|                      |   |   |   |
|----------------------|---|---|---|
| Lazuli Bunting       | 4 | 1 | b |
| Brown-headed Cowbird | 2 | 2 | b |
| Pine Siskin          | 2 | 1 | b |
| Evening Grosbeak     | 3 |   | b |

**Notes:**

Breeding Status:

B—direct evidence

1. Occupied nest—adults entering or leaving nest site; adult incubating or brooding.
2. Recently fledged young, incapable of flight or downy young of limited mobility.
3. Adults attending young—feeding, carrying food or fecal sac.
4. Used nest or eggshell found, evidence must be convincing.
5. Nest with clearly identifiable young.

b—indirect evidence

1. Singing males or territorial birds in suitable habitat during breeding season.
2. Courtship behavior or copulation
3. Adults visiting a probable nest site.
4. Agitation behavior, distraction display, or anxiety call from adult.
5. Nest building
6. Physiological evidence such as brood patch.

t—no evidence of breeding: transients, migrants or wide-ranging species.

Mammals observed: northern pocket gopher, fox, white-tailed deer, pine squirrel, chipmunk

Scat sign: Dusky Grouse, elk, moose

North facing slopes supported the most bird observations

Total species observed = 36 with 21 being migrant songbirds