

PROJECT COORDINATION PLAN  
November 3, 2015

**PROJECT: Lockwood Targeted Economic Development District**

**Project #: TBA**

I. INTRODUCTION

Big Sky Economic Development, Beartooth RC&D, and Yellowstone County will soon be contracting with Sanderson Stewart to develop a Comprehensive Development Plan for a Targeted Economic Development District (TEDD) in Lockwood, Montana.

This document outlines the team, responsibilities, schedule, public outreach, and communication efforts of this planning process. It may be amended from time to time, as necessary to update schedules and other elements that may change with mutual agreement.

II. CONTACT INFORMATION

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III. PROJECT TEAM

Sanderson Stewart is the lead consultant for this project. The personnel and their responsibilities include:

**Michael Sanderson, principal in charge** – Overall quality control, contractual issues, public outreach participation

**Lauren Waterton, project manager** –Project management, comprehensive development plan preparation, coordination with BSED, Stakeholder Group, Steering Committee and subconsultants, public outreach communications.

**Jeff Heidner, senior engineer** – Infrastructure needs and assessments, and cost estimating.

Subconsultants will provide additional expertise. These include the following personnel:

**Janet Cornish and Lanette Windemaker, Community Development Services of Montana** – Preparation of documents required for Yellowstone County Commissioners to consider and create the District.

**Stacey Robinson, Land Design, Inc.** - Preparation of concept trail alignment, coordination with stakeholder group, cost and schedule estimating for completing trail through the TEDD.

**Brian Duffany, Economic & Planning Systems**– Industrial development market forecast, site absorption and financing analysis.

**Leesa Kennedy, Nicheworx** – Industry analysis and identification of potential tenants.

#### IV. PROJECT GOALS

The goal of this project is to produce a Comprehensive Development Plan that will allow the Yellowstone County Commissioners to review and create the Lockwood TEDD at their discretion. Additional information regarding specific targeted industries, funding strategies and work plans will also be part of the Comprehensive Development Plan. Finally, work will be completed to create a concept trail alignment through the project, enabling connection to the future bypass.

#### V. WORK PLAN

Specific work actions to be completed will be divided into the following 11 phases. A schedule of these phases are shown in the Section VI. Specific phases of the work plan include the following:

##### **Phase 1: Refinement of the District Boundary (December 2015 – January 2016)**

In this phase, we begin the process with a workshop with the property owners within the Lockwood Concept TEDD Study Area, as shown in the *Statement of Infrastructure Deficiency*, adopted by the Yellowstone County Commissioners on April 21, 2015. The final boundary for the TEDD cannot be any larger than the concept area. The purpose of this meeting will be to discuss the TEDD process, impacts and affects to properties within the TEDD, process, and zoning.

Based on property owner interest for inclusion, a preliminary boundary will be established. The proposed district area will be evaluated for compliance with Title 7, Chapter 15, Part 42 of the Montana Codes Annotated requiring districts to be of a continuous area that is "large enough to host a diversified tenant base of multiple independent tenants."

##### **Phase 2: Property Zoning (February 2016 – March 2016)**

To be eligible for inclusion with the TEDD, all property must be zoned for uses in accordance with the County Growth Policy. In this phase, the consultant team will provide technical assistance to property owners who wish to initiate zoning for their property. Zoning requests will not be initiated by the consultant, BSED or Yellowstone County.

Property owners seeking zoning for their property can collectively submit one application to Yellowstone County. In order for the project to remain on schedule, an application for zone change must be received by the City/County Planning office no later than **February 8, 2016**. This will allow for

review by the Zoning Commission on March 14, 2016 and a County Commission hearing on March 29, 2016.

### **Phase 3: Commerce Park Trail Connection Plan (December 2015 – February 2016)**

This phase will involve the development of the concept trail alignment along Johnson Lane, through the Trailhead Commerce Park and connecting to the future Bypass. Specific tasks include concept trail route, feasibility analysis, evaluation of right-of-way analysis and cost estimates. Within the Phase, the consultant team, led by Land Design, Inc, will meet with stakeholders specific to the trail development, including Trailhead Commerce Park partners, City County Planning, Lockwood Pedestrian Safety District, Montana Department of Transportation and other groups with interests in development of the trail. A public meeting will be held to review and provide comments on concept alignments.

### **Phase 4: Targeted Industries and Economic Analysis (December 2015 – February 2016)**

Using information from the Yellowstone County Industrial Park Feasibility Analysis, the Economic Impact of the Trailhead Commerce Park, and Big Sky Economic Development Business Recruitment, the consultant team will identify specific targeted industries and potential anchor tenants. Specific tasks, led by Economic & Planning Systems and Nicheworks will involve analysis of existing employment and development forecasts, quantifying the market share by industry, and evaluation of market share capture within the proposed TEDD.

Additionally, evaluation of site absorption for years 5, 10 and 20 will be completed, enabling estimated tax revenue generation. These tax revenue estimates will be used to analyze potential funding strategies, including bonds and loans.

### **Phase 5: Infrastructure Analysis (January – February 2016)**

Using the *Statement of Infrastructure Deficiency*, the consultant team will analyze these deficiencies, evaluate project priorities and deliver preliminary cost estimates. This phase will involve working closely and meeting with utility providers and property owners to evaluate expansion and capacity issues, obstacles to development and other issues that may hinder infrastructure development. Development of criteria to evaluate projects will also be completed in this phase.

### **Phase 6: Development Scenarios (January – March 2016)**

Using information from all previous phases the project team will identify up to three scenarios of development within the project area. These scenarios will assess project development, infrastructure projects, projected job creation, TIF revenue, cost estimates and funding strategies. Evaluation criteria of these scenarios will also be established with input from stakeholders, property owners, BSED and other key constituents. A public meeting will be held to review scenarios, evaluation criteria and provide comments on scenario plans. This phase will end with identification of a preferred scenario.

### **Phase 7: Program Administration and Work Plan (March – April 2016)**

Upon identification of a preferred scenario, the work will shift to focus on strategies and actions to complete the scenario. The team will work with BSED to identify program administration and

management options and preferences. Evaluating the organization structure for program management will be essential for successful implementation of the comprehensive development plan.

Additionally, a five-year work plan will be created. This plan will address project priorities, responsibilities and funding strategies for each activity identified within the plan.

#### **Phase 8: Prepare Comprehensive Development Plan (March 2016)**

This phase involves preparation of the Comprehensive Development Plan, as required to create the TEDD. Many of the previous phases include items that are more detailed and beyond the statutory requirements for creation of the TEDD. In this phase, the team will assemble all required elements for a comprehensive development plan. This plan will be developed to ensure compliance with Title 7, Chapter 15, Part 42 of the Montana Codes Annotated. Work that has been completed and is beyond the statutory requirements will be prepared as supporting documentation and available for the next phase of review meetings.

#### **Phase 9: Advisory and Governing Board Meetings (April – May 2016)**

There are several boards that will be reviewing the Comprehensive Development Plan. To review compliance with the Yellowstone County Growth Policy, the Plan will be presented to the City/County Planning board for review and acknowledgement such compliance. Additionally, there will be presentations of the Plan to the Lockwood community and BSED Board of Directors.

Finally, the Yellowstone County Commission will review and consider adoption of the Plan.

#### **Phase 10: Legal Documents (June 2016)**

In order for the TEDD to be created, specific documents must be assembled for delivery to the Montana Department of Revenue to certify the base taxable value. This phase will involve the assembly of these documents, including findings from the City/County Planning Board and the County Commission, previously approved *Resolution of Necessity and Statement of Infrastructure Deficiency*, the Comprehensive Development Plan, and copy of notice of public hearing.

#### **Phase 11: Final Comprehensive Development Plan (June 2016)**

Upon completion of previous phases, as document all the entire work product will be produced. This will include the adopted Comprehensive Development Plan, concept trail alignment, targeted industries analysis, preferred development scenario, program administration and work plan. Appendices of additional background information and alternate development scenarios will also be provided. The intent of the Plan will be provide a complete document of all work produced for the project.

## VI. PROJECT SCHEDULE

The follow schedule identifies the estimated start and end dates for each phase of the project. The project end date is schedule for no later than June 30, 2016. Many of the phases can run concurrently, to ensure the most efficient schedule and timely completion of the project.

<b>Comprehensive Development Plan</b>		<b>Start</b>	<b>End</b>
Phase 1	Refinement of District Boundary	11/15/2015	1/31/2016
Phase 2	Property Zoning	2/8/2016	3/29/2016
Phase 3	Commerce Park Trail Connection	12/7/2015	2/12/2015
Phase 4	Target Industries	12/7/2015	2/12/2016
Phase 5	Infrastructure Analysis	1/11/2016	2/12/2016
Phase 6	Development Scenarios	1/22/2016	3/14/2016
Phase 7	Administration and Work Plan	3/28/2016	4/15/2016
Phase 8	Comprehensive Development Plan Preparation	3/8/2016	4/07/2016
Phase 9	Review Meetings	4/8/2016	5/31/2016
Phase 10	Legal Documents	6/1/2016	6/30/2016
Phase 11	Final Comprehensive Development Plan	6/1/2016	6/30/2016

## VII. COMMUNICATIONS

Sanderson Stewart will provide regular communications with the BSED and the project Steering Committee regarding the progress of this project.

1. A weekly project status report will be sent on Fridays via email to all members who wish to be included in this correspondence. Information in this weekly update includes:
  - a. Recently completed tasks
  - b. Upcoming tasks
  - c. Upcoming project milestones (i.e. deliverables, public meetings, etc)
  - d. Scope and schedule issues
  - e. Issues to be aware of
  - f. Miscellaneous announcements
  
2. A project website currently hosted by BSED should be continued. Information related to the project, schedules, documents and educational materials will be provided to be included in this website.
  
3. In addition to public meetings outlined in the work plan, meetings with the Steering Committee should be held on a monthly basis. These meetings will be for reviewing data collected, progress made, decision points and other issues that may arise during the project.

