

Montana Greater Sage Grouse Stewardship Grants

Pre-Application Proposal Process and User Guide

The Sage Grouse Habitat Conservation Program (Program) requests the following information to prepare a preliminary report for would-be applicants who are considering whether to apply for funding from the Sage Grouse Stewardship Account. This process is intended for those applicants interested in creating preservation projects through perpetual conservation easements, conservation leases, or contractual lease agreements. Preservation projects may include a separately submitted restoration and/or enhancement component capable of increasing the quantity and/or quality of sage grouse habitat. However, a restoration or enhancement component is not required to apply for funding from the Sage Grouse Stewardship Account.

The Program will apply the Habitat Quantification Tool (HQT) and applicable policy to estimate the number of credits that might be available from the project, according to the Montana Mitigation System Policy Guidance Document for Greater Sage-Grouse October 2018, v1.0 and the Montana Mitigation System Habitat Quantification Tool Technical Manual for Greater Sage-Grouse October 2018, v1.0.

The Program will also assemble other ecological metrics related to the project. The Program will compile this information into a Preliminary Review Report and provide it to would-be applicants who can then determine for themselves whether to further submit a Complete Application. Applicants should submit their Pre-Application Proposal and receive a Preliminary Review Report from the Program before further submitting a Complete Application for grant from the Sage Grouse Stewardship Account.

SUBMISSION INFORMATION

Pre-Application Proposals should be submitted through the Montana Sage Grouse Habitat Conservation Program Project Consultation and Review Website at <https://sagegrouse.mt.gov/>

Be prepared to include spatial data for the project. Accepted GIS file types that can be uploaded include Geodatabase, Keyhole Markup Language, or Shapefile. Other file formats such as “pdf”, “jpg”, or “kmz” do not enable use of the habitat quantification tool. Contact the Program directly with questions about technical data requirements.

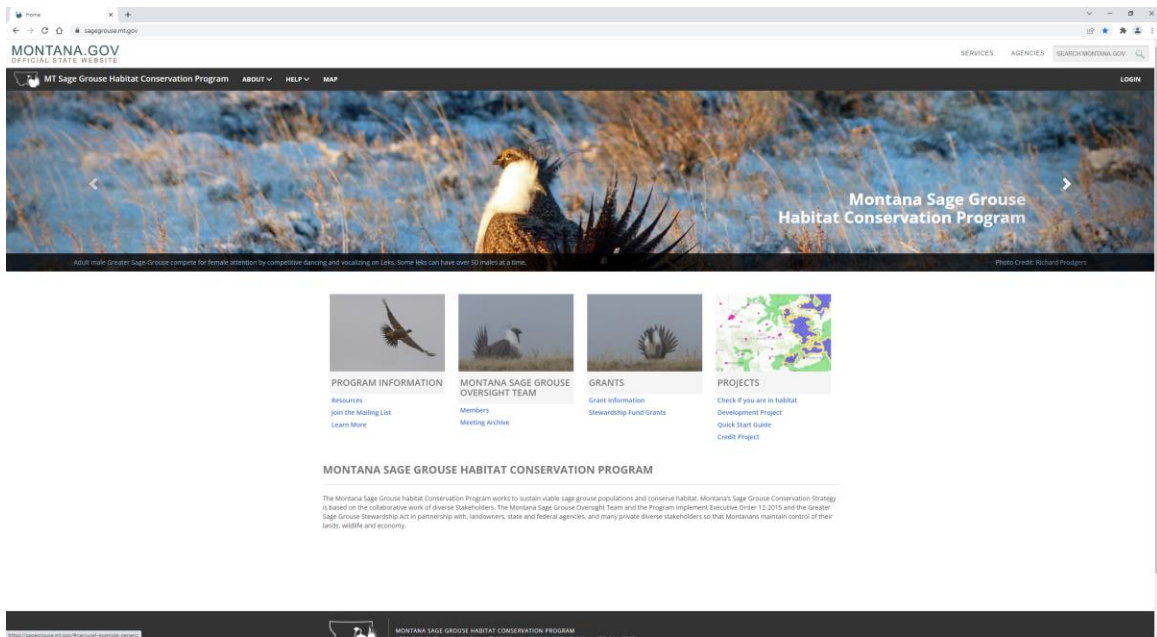
Pre-Application Proposals must be submitted using this website. This will allow sufficient time for the Program to complete HQT calculations and return Preliminary Review Reports so would-be applicants can decide if submitting a Complete Application is advantageous.

<p>NOTE: a proposed project will not advance in the grant selection process based on the Pre-Application Proposal alone. All interested agencies or organizations will need to submit the more detailed Complete Application, final spatial data, and supporting information.</p>

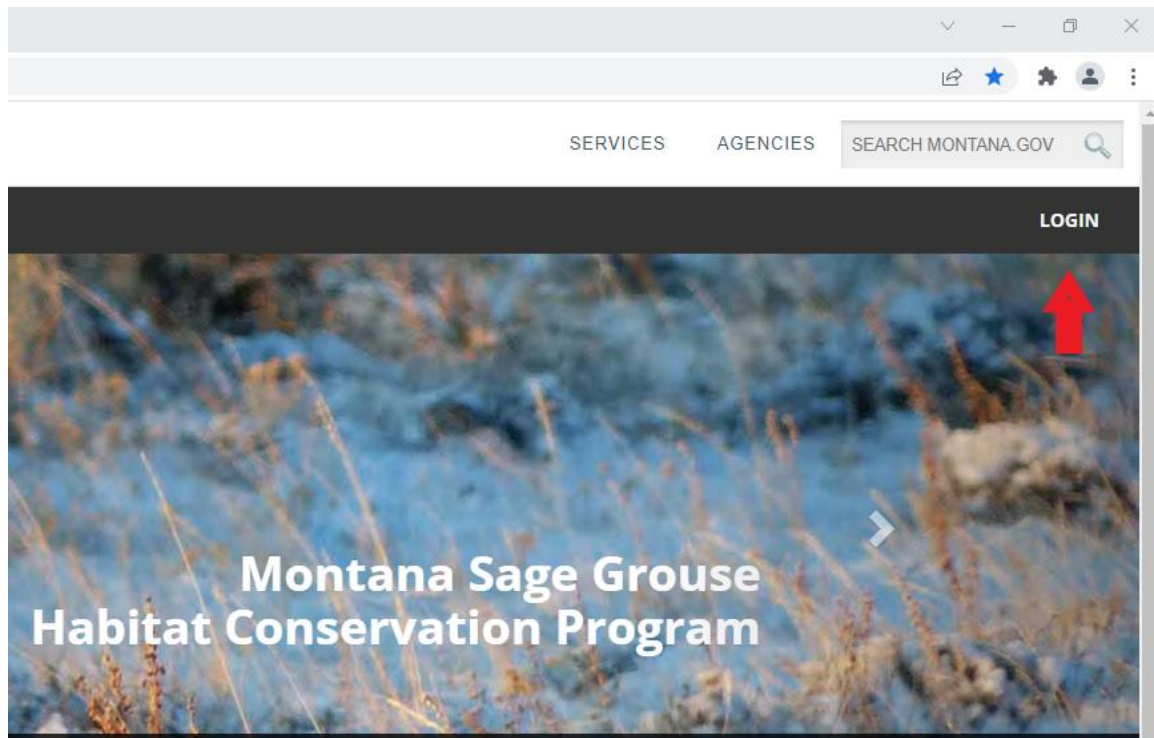
PRE-APPLICATION SUBMISSION USER GUIDE

LOGGING IN

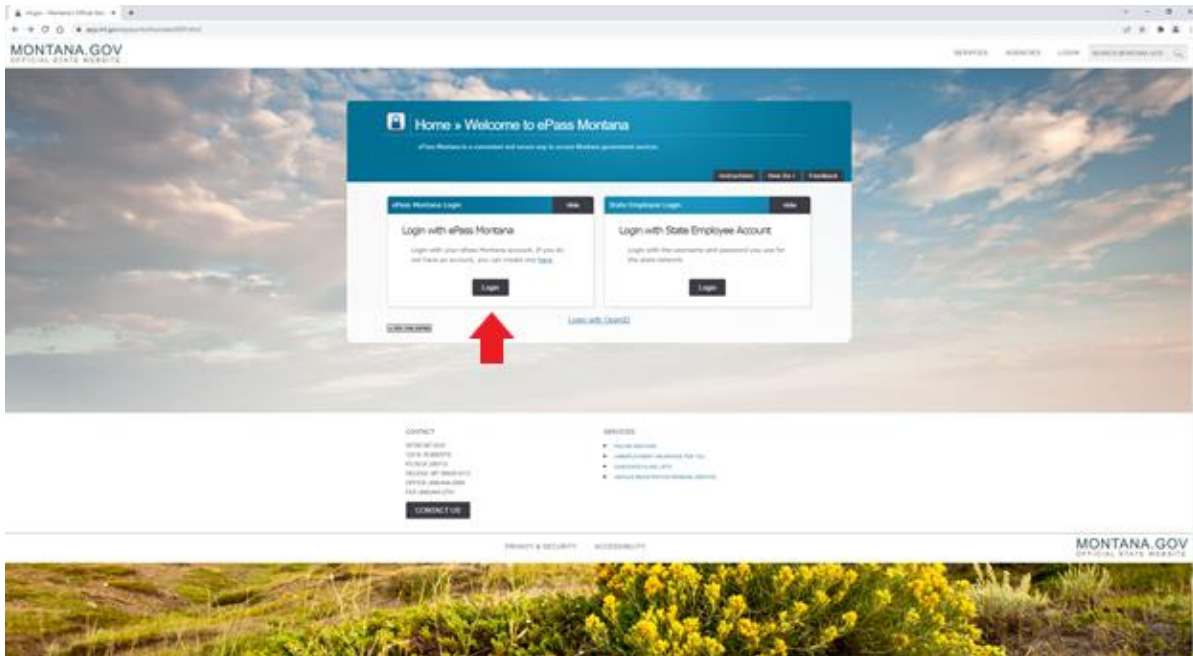
- 1.) Access the Montana Sage Grouse Habitat Conservation Program Project Consultation and Review Website at <https://sagegrouse.mt.gov/> to begin your pre-application submission.



- 2.) Click the **LOGIN** button at the top right corner of the webpage.



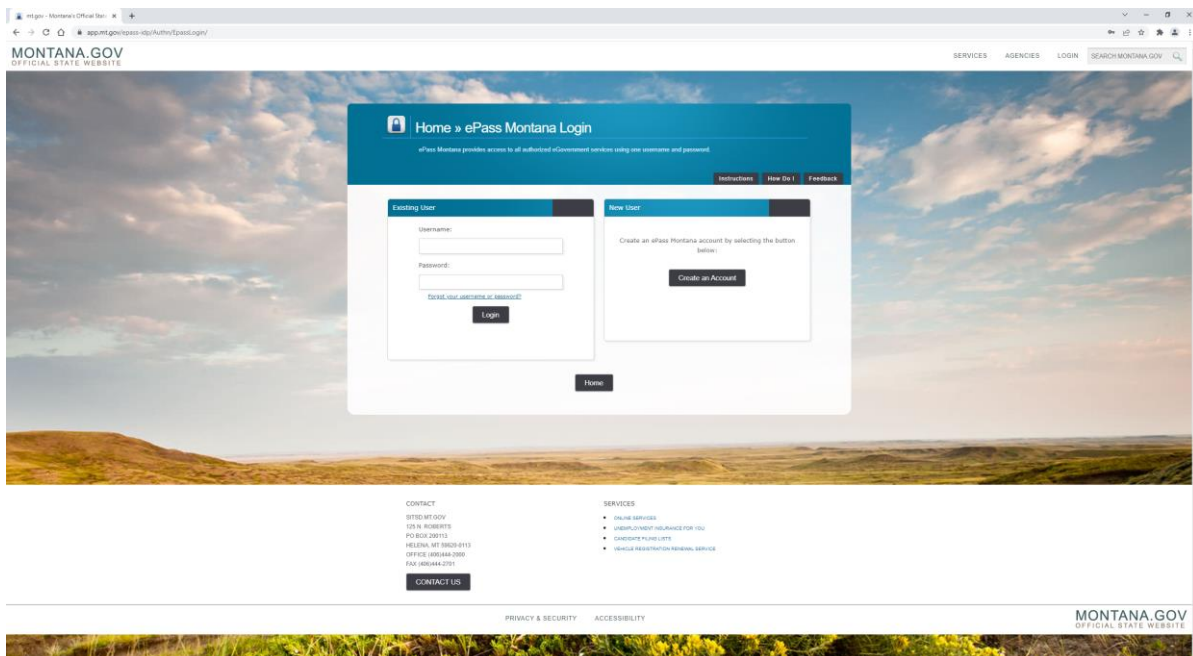
3.) Sign in with your Login with ePass Montana account by clicking the **Login** button



4.) Existing Users who have already created an ePass Montana account will sign in with their **Username** and **Password**.

OR

New Users will need to Create an ePass Montana account by selecting the **Create an Account** button to access the ePass Montana Login with a Username and Password.



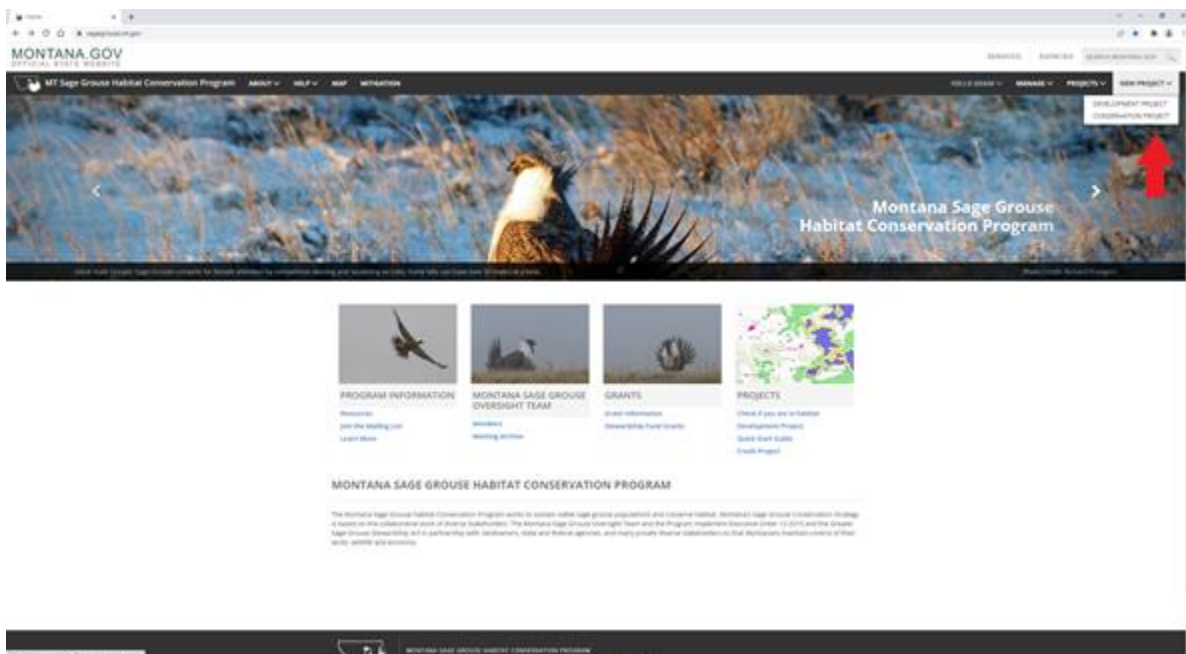
IMPORTANT NOTE: Login with ePass Montana will soon be obsolete as the Program transitions to a new login system. Applicants should be aware of these coming changes and be prepared to use a new login system that will include updated instructions with this Pre-Application Proposal Process and User Guide. Until then, users should utilize the Login with ePass Montana instructions discussed here.

CREATING A NEW PROJECT

Creating a new project through the Project web page creates an orderly, consistent way for the Program to receive and process requests for review and consultation. Providing complete information will help the Program review projects more efficiently. Your information will be kept secure, is not viewable by others, and will not be sold or disseminated. If you do not initially complete your new project submission, you can click the Save button and return later to complete the remaining sections. All information, including any attachments, will be saved for you.

HOW TO CREATE A NEW PROJECT

- 1.) After logging in with your ePass Username and Password, click on **NEW PROJECT** in the upper right corner of the menu bar to be able to select a conservation project.
- 2.) Click **CONSERVATION PROJECT**



You will be directed to a “Propose a conservation project in sage grouse habitat” webpage as seen below.

PROPOSING A CONSERVATION PROJECT STEPS

As seen in the previous image, applicants applying for funding from the Sage Grouse Stewardship Account will have 6 steps for guiding, describing, and submitting their Pre-Application Proposal including:

- 1.) Instructions
- 2.) Basics
- 3.) Activities
- 4.) Questionnaire
- 5.) Attachments
- 6.) Review and Submit

STEP #1 (Instructions)

The Instructions page will help guide you through the submission process. Consult the information on this page to make sure your project is located within designated sage grouse habitat or for more information including about the Montana Mitigation HQT Basemap.

Once you have reviewed the Instructions page, click the blue **Continue** button on the lower right side of the page (as seen in the previous image) to proceed to the Basics Page.

STEP #2 (Basics)

Project Information:

On the Basics page, applicants will need to create a **Project Name** and provide a description of their intended preservation project.

Project Contact Information:

Continue to enter your **Project Contact Information**, including Email, Phone, Mailing Address, and if applicable, Additional Contact Info.

Additional Information:

Because this is a Pre-Application Proposal for a grant, select from the drop down (see image below) “**I want to apply for a Stewardship Account Grant**”.

The screenshot shows a web form titled "Propose a conservation project in sage grouse habitat". On the left is a sidebar with navigation links: 1. Introduction, 2. Basics (highlighted), 3. Activities, 4. Documentation, 5. Attachments, and 6. Review & Submit. The main form area is divided into sections. The "Project Information" section has fields for "Project Name" and "Description". Below this is the "Project Contact Information" section with fields for "Name", "Email", "Mailing Address", and "Additional Contact Info". The "Additional Information" section contains a dropdown menu for "Why are you submitting a credit project to the Sage Grouse Habitat Conservation Program?". A tooltip is visible over this dropdown, listing three options: "I want to apply for a Stewardship Account grant", "I want to apply for a Stewardship Account grant", and "I want to apply for a Stewardship Account grant". Below the dropdown are fields for "Credit Owner", "Additional Contact Name (Optional)", "Email (Optional)", "Mailing Address (Optional)", and "Additional Contact Info (Optional)". At the bottom right are "Save" and "Save & Continue" buttons.

Credit Owner:

If you are an existing Customer, select your name from the Customer, drop down list.

If you are a new Customer, add it to the list by checking the box and typing your name in the text bar. Optional to include Additional Contact Information. (See example in image below)

This screenshot shows a close-up of the "Additional Information" section of the form. It features a dropdown menu for "Why are you submitting a credit project to the Sage Grouse Habitat Conservation Program?" with the selected option being "I want to apply for a Stewardship Account grant". Below this is the "Credit Owner" section. It includes a "Customer" dropdown menu with the option "Select an existing Customer". Below the dropdown is a text input field containing "John Doe". There is a checkbox labeled "Select a customer from the dropdown list. If your desired option is not available, please add it to the list by checking this box". Below this are fields for "Additional Contact Name (Optional)" (containing "Jane Doe"), "Email (Optional)" (containing "john.jane.doe.ranch@gmail.com"), "Phone (Optional)", "Mailing Address (Optional)" (with fields for "Street Address", "City", "State", and "Zip"), and "Additional Contact Info (Optional)". At the bottom right are "Save" and "Save & Continue" buttons.

Once you have completed the Basics page, click the blue **Save & Continue** button on the lower right side of the page (as seen in the previous image) to proceed to the Activities page.

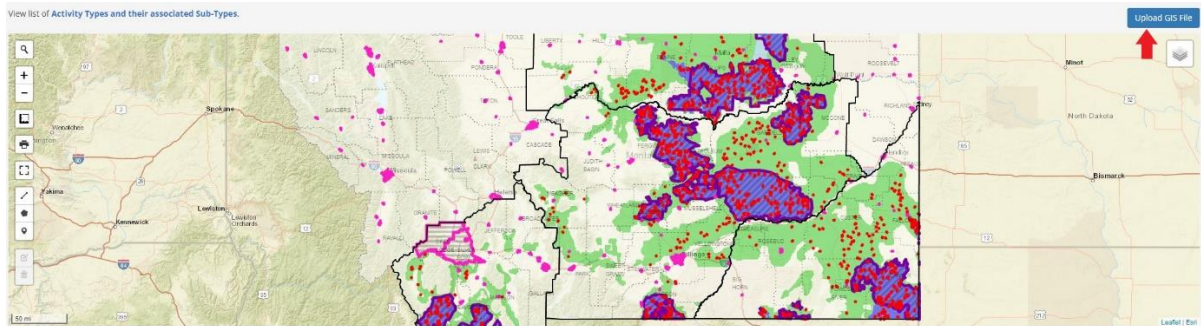
STEP #3 (Activities)

The Activities page is intended for applicants to accurately provide spatial data of their preservation project to the Program for review. It is critical that the spatial data correctly depicts the area from where the proposed project takes place. Accepted GIS file types that can be uploaded include Geodatabase, Keyhole Markup Language, or Shapefile.

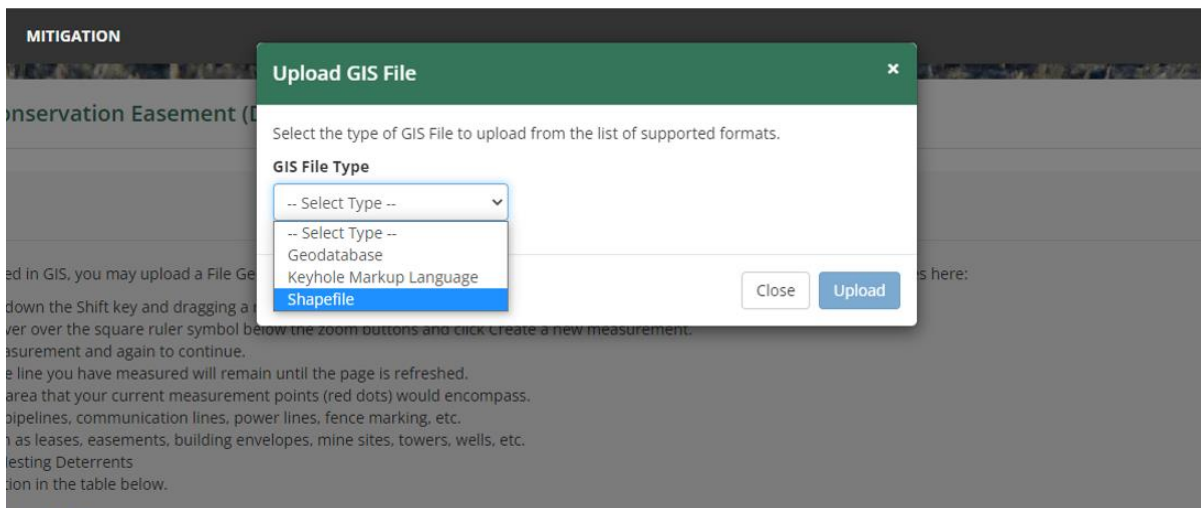
Next is an example of how to upload a GIS file to the Activities Page of your project. For this example, a shapefile was created from ArcGIS Pro software that has been compressed into a zipped folder. (A shapefile needs to be compressed for it to include all the necessary files associated with that shapefile).

Example How To:

- 1.) Click the blue **Upload GIS File** button.



- 2.) An Upload GIS File popup will appear. Select the **GIS File Type** from the dropdown list that your GIS file is formatted as.



- 3.) Click on **Choose File**.
- 4.) Locate where you saved your data to add it.
- 5.) Click the **Upload** button (see next image).

Upload GIS File

×

Select the type of GIS File to upload from the list of supported formats.

GIS File Type

Shapefile

GIS File

Choose File

Property Bo...y Example.zip

Supported extensions: .zip

Your file can contain polygons, points, and lines. The projection does not matter. We will re-project your geometries to Montana State Plane (32100).

Close

Upload

Your project will display as a polygon on the map on Activities page. (see next image)

View list of Activity Types and their associated Sub-Types.

Upload GIS file

Name	Feature	Type	*Width (ft)	Length (ft)	Area (acres)	EO Habitat Classes	Counties	TRS	Ownership	Notes
	Polygon	-- Select type --			3,047.466	EO-Core Area	Phillips	Township 26 North, Range 27 East, Section 36	Montana State Trust Lands, Private, US Bureau of Land Management	

*Enter Width for Mitigation Activities drawn as line features. The DDCT calculation will use this width.

Save

Save & Continue

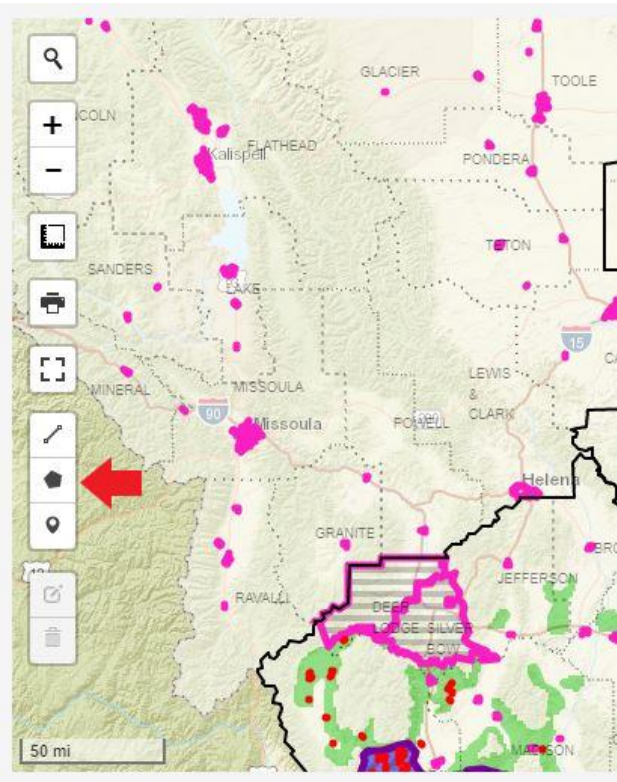
- 6.) In the box under **Name**, name the polygon feature.
- 7.) Click on the **Select type** list and select your Easement Type.
- 8.) If applicable, provide any notes in the **Notes** column.
- 9.) Once you have completed the Activities page, click the blue **Save & Continue** button on the lower right side of the page (as seen in the previous image) to proceed to the Questionnaire Page.

NOTE:

While it is possible to manually draw the boundaries of your preservation project using the polygon tool provided by the webapp (see image to left of this text box with red arrow), it could likely be difficult to depict the boundaries accurately. Therefore, it is recommended that applicants utilize GIS software programs that can create the accepted GIS file types.

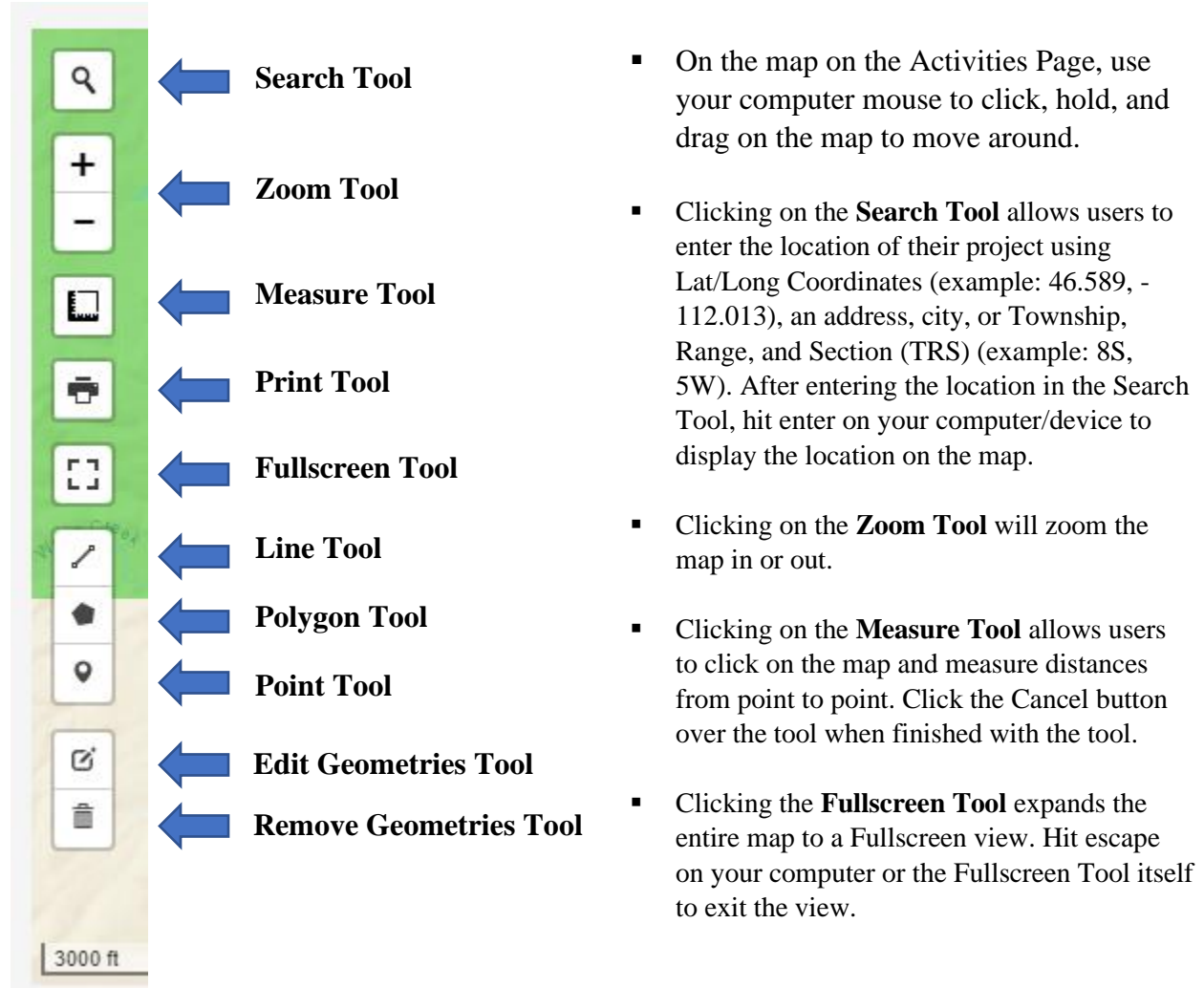
If you choose to manually draw the boundaries of your proposed preservation project using the polygon tool, refer to the **Activities Tools Info and Guide Chart** discussed in further detail.

Please consult the Program at sagegrouse@mt.gov for any needed assistance.



ACTIVITIES TOOLS INFO AND GUIDE CHART

The Tools (see next image) found on the left side of the map on the Activities Page are designed to allow applicants the opportunity to draw the geometries of their project activities using lines, polygons, and points. In doing so, applicants unable to upload a GIS file illustrating their project can use these tools instead to include the required spatial data for their pre-application proposal. Each tool and how to use it will be described in further detail to help applicants use them effectively.



- Clicking the **Line, Polygon, or Point Tools** allows users to draw the geometries of their project activities on the map. Users can click the Finish button over the tool when they are satisfied with their drawing or click Delete Last Point or Cancel to partially or entirely remove the geometries they are drawing. (Remember to fill out the Name and Feature Type for each feature in the columns below map)
- Clicking the **Edit Geometries Tool** or **Remove Geometries Tool** allows users to edit or remove any of the geometries they have drawn. For projects with multiple geometries, click the specific feature in the list below the map to specify which feature/geometry you wish to edit or remove. (The feature/geometry row you wish to select will highlight in yellow.)

- Clicking on the **Layers Tool** at the top right corner (see next image) of the map allows users to select numerous layers they wish to project onto the map. Feel free to select any of these layers that may help assist you in completing the Activities Page.



RESTORATION AND ENHANCEMENT COMPONENTS

As mentioned, the Pre-Application Proposal process is intended for those applicants interested in creating preservation projects through perpetual conservation easements, conservation leases, or contractual lease agreements. However, preservation projects may include a restoration and/or enhancement component capable of increasing the quantity and/or quality of sage grouse habitat.

If you have a restoration and/or enhancement component, enter the activity following the “How To” (#’s 1-9) discussed in Step 3 (Activities). You may also utilize the Activities Tools as discussed in the ACTIVITIES TOOLS INFO AND GUIDE CHART section on pages 10-11 to draw the geometries for your restoration and/or preservation project(s) if you are unable to upload the spatial data using the “Upload GIS File” button.

As an example, a ‘conifer removal’ would include the boundaries of the proposed area as a polygon feature. Whereas ‘fence marking’ would be entered as a line feature. Upload spatial data or utilize a geometry tool that best represents the spatial boundaries of your project.

Enter the Name and Select Type of your Restoration/Enhancement feature once you have added it. Enter any Notes if applicable. Then click Save & Continue when done.

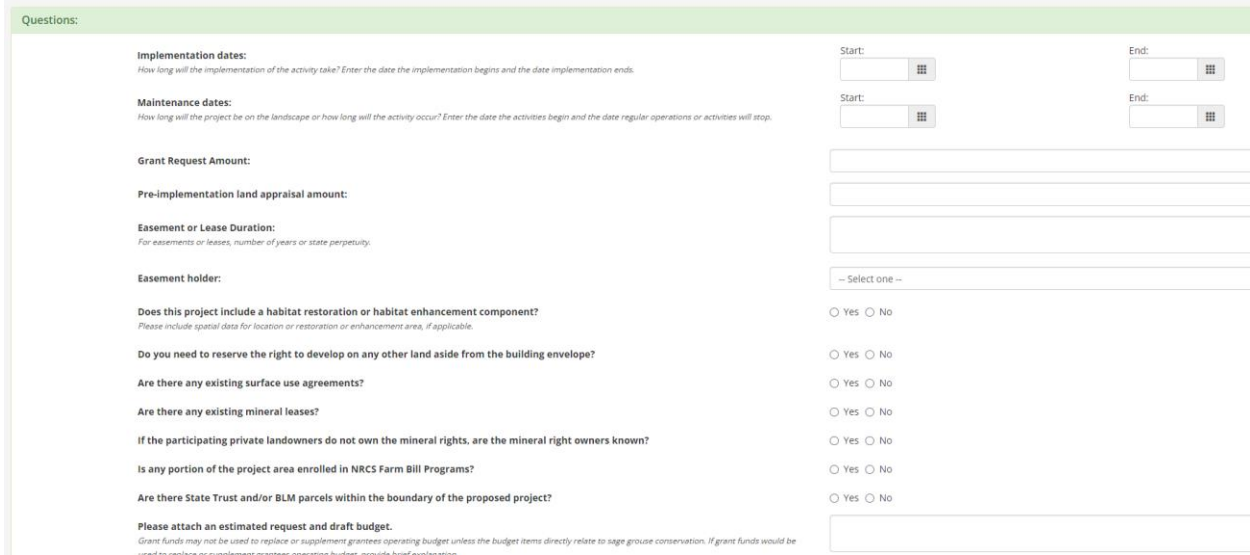
Activity Types for Restoration and Enhancement Projects often associated with Preservation Projects include:

- Aquatic Habitat Restoration
- Invasive Species Removal
- Mesic Habitat Restoration
- Seeding
- Conifer Removal
- Other Activity to Maintain or Improve Sagebrush Habitat
- Structure Removal

STEP #4 (Questionnaire)

The Questionnaire Page is determined based on the specific Activities you selected in the previous step (Step #3 Activities). These questions are intended to help guide the Program in the developing the Preliminary Review Report for this proposed preservation project. Answer each question listed.

(Example Questionnaire Page below)

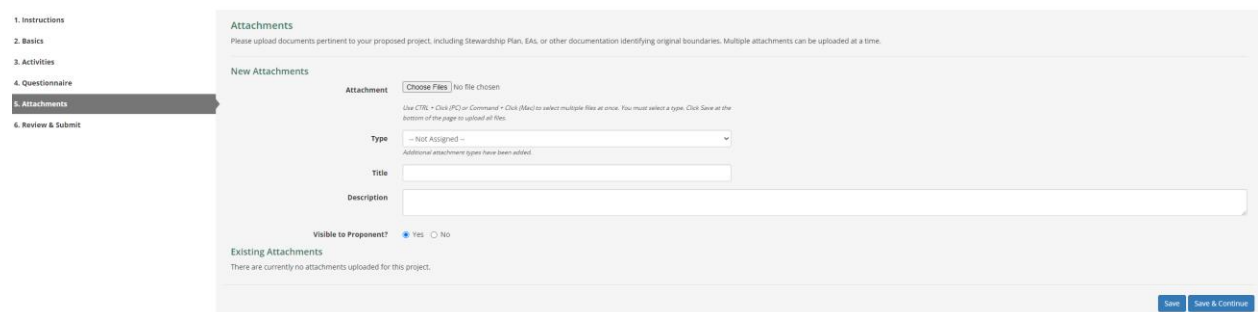


The screenshot shows a questionnaire form with a green header labeled "Questions:". The form is divided into two columns. The left column contains text-based questions with sub-headers: "Implementation dates:", "Maintenance dates:", "Grant Request Amount:", "Pre-implementation land appraisal amount:", "Easement or Lease Duration:", "Easement holder:", and a series of yes/no questions. The right column contains date pickers for "Start:" and "End:" at the top, followed by input fields for the amounts, a dropdown for the easement holder, and radio buttons for the yes/no questions. At the bottom right, there is a "Save & Continue" button.

Once you have completed the Questionnaire Page, click the blue **Save & Continue** button on the lower right side of the page to proceed to the Attachments Page.

STEP #5 (Attachments)

Applicants should include documents pertinent to their Pre-Application Proposal that may be useful for the Program's Preliminary Review Report that have not already been provided from the previous steps. However, see the 'Required Documents' needed for the Complete Application Process below to determine the documents that do not need to be uploaded during the Pre-Application Proposal process for Step #5.



The screenshot shows the "Attachments" page. On the left is a sidebar with a list of steps: 1. Instructions, 2. Basics, 3. Activities, 4. Questionnaire, 5. Attachments (highlighted), and 6. Review & Submit. The main content area is titled "Attachments" and includes a sub-header "New Attachments". It features a "Choose Files" button, a "Type" dropdown menu, and input fields for "Title" and "Description". There is also a "Visible to Proponent?" checkbox. At the bottom, there is a section for "Existing Attachments" and a "Save & Continue" button.

Click the **Choose Files** button to include the attachment you wish to provide.

Select the **Type** of attachment you are choosing to provide from the drop-down menu.

Provide a **Title** and **Description** of the attachment.

Click **Save**.

Once you have completed the Attachments Page, click the blue **Save & Continue** button on the lower right side of the page to proceed to the Review & Submit Page.

NOTE: The Pre-Application Proposal process precedes additional information that will be needed in the future for a **Complete Application**.

If you decide to submit a **Complete Application** after receiving the Program's Preliminary Review Report, the following documents should be submitted with the Complete Application. This information will assist during the evaluation process and would be required ultimately if selected for funding by MSGOT.

Proponents should return to the same conservation project they already submitted through the Montana Sage Grouse Habitat Conservation Program Project Consultation and Review Website to include additional information.

REQUIRED DOCUMENTS FOR A COMPLETE APPLICATION

(NOT NEEDED FOR PRE-APPLICATION PROPOSALS)

This list is provided here so that would-be applicants know what will be expected in the future.

- Project Design/Maps
- Final Spatial Data
- Letters of Support
- Site Management or Stewardship Plan
- Restoration Plan, if applicable
- Enhancement Plan, if applicable
- Site Monitoring Plan
- Itemized Detailed Budget, including request, matching sources of funds and in-kind contributions
- Easement or Lease Terms
- Market Appraisal for easements to determine the grant request amount
- Mineral Remoteness Review Report for easements
- Easement or Lease Acknowledgement Form

STEP #6 (Review & Submit)

After you have completed entering your proposed project (Steps 1-5), review the information you have provided on the Review & Submit Page. Once you are satisfied with the information you have provided, click the blue **Submit** button on the lower right side of the page.

From here the project will proceed into a review by the Program. The Program will compile this information into a Preliminary Review Report and provide it to would-be applicants who can then determine for themselves whether to further submit a Complete Application.

If a would-be applicant decides to submit a Complete Application after receiving the Program's Preliminary Review Report, those applicants will have access to their Conservation Project from the same account they used to create the project on the webapp at <https://sagegrouse.mt.gov/>

Thank you for submitting a Pre-Application Proposal!

Feel free to contact the Sage Grouse Program directly with any questions.