

# Conservation Project User Guide

## Montana Sage Grouse Habitat Conservation Program

### Website for Conservation Projects

Website Version SGv3.0 (<https://sagegrouse.mt.gov/>)

#### BACKGROUND

The Conservation Project User Guide document describes the process for submitting conservation projects for review (e.g., consultation) with the Montana Sage Grouse Habitat Conservation Program (hereafter, Program) through the Program's website (<https://sagegrouse.mt.gov/>). The submission process documented here is useful for anyone (e.g., project proponents) conducting conservation projects within state or federally-designated sage-grouse habitat that cover any of the following reasons:

1. Conservation projects applying for a Stewardship Account Grant,
2. Conservation projects requiring an agency authorization (state or federal), or
3. Conservation projects intended for Permittee-Responsible Mitigation.

The submission process differs for the three reasons listed above as the requirements for Program review and consultation differ based on the projects role within the Montana Mitigation System for Greater Sage-Grouse (hereafter, Mitigation System). Using the Conservation Project User Guide to identify the reason for implementation of a conservation project will help users navigate the project submission process effectively and reduce consultation time.

For more information regarding the Mitigation System, consult the Montana Mitigation System Policy Guidance Document for Greater Sage-Grouse (Version 1.0, October 2018) and the Montana Mitigation System Habitat Quantification Tool Technical Manual for Greater Sage-Grouse (Version 1.0, October 2018) available at the Program's website (<https://sagegrouse.mt.gov/Team>).

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## 1. INTRODUCTION

The greater sage-grouse (hereafter, sage-grouse) was once a candidate species for listing under the federal Endangered Species Act (hereafter, ESA) across its range in 11 western states. Montana and 10 other western states developed conservation strategies to conserve sage-grouse and address threats caused by habitat fragmentation, development, and loss of sagebrush. These state commitments led the U.S. Fish and Wildlife Service to finding that sage-grouse did not warrant listing under the ESA on October 2, 2015<sup>1</sup>.

Montana's Sage Grouse Conservation Strategy (hereafter, Montana's Conservation Strategy) is based on the collaborative work of the Montana Sage Grouse Habitat Conservation Advisory Council and supported by diverse stakeholders<sup>2</sup>. The 2015 Montana State Legislature passed the Greater Sage-Grouse Stewardship Act (hereafter, Stewardship Act) and Executive Orders 12-2015<sup>3</sup> and 21-2015<sup>4</sup> (collectively hereafter, EO; <https://sagegrouse.mt.gov/About>). Taken together, the Stewardship Act and the EO establish Montana's Mitigation System and require the Montana Sage Grouse Habitat Conservation Program (hereafter, Program) to review all proposed activities in sage-grouse habitat designated as Core Area, General Habitat, or Connectivity Area (collectively hereafter, designated sage-grouse habitat).

Montana's Mitigation System provides a flexible, creative approach to either conserving sage-grouse habitat or offsetting impacts to development in service to Montana's Conservation Strategy. The Mitigation System's currency is debits and credits. Mitigation credits are created by removing or limiting threats to sage-grouse habitat quantity and/or quality through conservation actions, such as preservation, restoration, or enhancement actions.

Currently, credits may be produced through conservation projects funded by Stewardship Account Grants or created and used by Project Developers conducting their own compensatory mitigation projects to offset development impacts (i.e., Permittee-Responsible Mitigation). Conservation projects receive credit only for actions that meet all necessary eligibility requirements. Eligibility requirements and criteria ensure that credit-generating projects will support the long-term health and maintenance of sage-grouse populations and habitats. The Program, with direction, oversight, and approval from the Montana Sage Grouse Oversight Team (hereafter, MSGOT), determines whether proposed projects meet all eligibility requirements and works collaboratively with project proponents. For more information, consult the Montana Mitigation System Policy Guidance Document for Greater Sage-Grouse<sup>5</sup> (Version 1.0, October 2018; hereafter, Policy Guidance Document).

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<sup>1</sup> 80 FR 59857 (Oct. 2, 2015).

<sup>2</sup> Montana Sage-Grouse Work Group (FWP). 2005. Management Plan and Conservation Strategies for Sage Grouse in Montana – Final Rev. 2-1-2005.

<sup>3</sup> State of Montana Office of the Governor Executive Order No. 12-2015 (Sept. 8, 2015).

<sup>4</sup> State of Montana Office of the Governor Executive Order No. 21-2015 *Erratum* (Dec. 21, 2015).

<sup>5</sup> Montana Sage Grouse Habitat Conservation Program. 2018a. Montana Mitigation System Policy Guidance Document for Greater Sage-Grouse. Version 1.0. Montana Department of Natural Resources and Conservation, Helena, MT. Available at: [https://sagegrouse.mt.gov/documents/1\\_Final\\_MT\\_Policy\\_Guidance\\_October4-2018\\_compressedV11.pdf](https://sagegrouse.mt.gov/documents/1_Final_MT_Policy_Guidance_October4-2018_compressedV11.pdf) (4/8/2022).

## 1.1. Purpose of the Conservation Project User Guide

The Conservation Project User Guide describes the process for submitting conservation projects for review (e.g., consultation) with the Program through the Program's website (<https://sagegrouse.mt.gov/>). The submission process documented here is useful for anyone (e.g., project proponents) conducting conservation projects within state or federally-designated sage-grouse habitat that cover any of the following reasons:

1. Conservation projects applying for a Stewardship Account Grant,
2. Conservation projects intended for Permittee-Responsible Mitigation, or
3. Conservation projects requiring an agency authorization (state or federal).

The submission process differs for the three reasons listed above as the requirements for Program review and consultation differ based on the projects role within Montana's Mitigation System. To support these three conservation project submission reasons, the Program's website offers a customized and orderly process for project proponents to provide information to the Program. The website is designed to support streamlined and efficient Program consultations. Using the Conservation Project User Guide to identify the reason for submitting a conservation project will help project proponents navigate the website's project submission process effectively, and along with providing complete project information, help minimize consultation time with the Program, and ultimately reach their project implementation sooner.

For more information regarding Montana's Mitigation System, consult the Policy Guidance Document and the Montana Mitigation System Habitat Quantification Tool Technical Manual for Greater Sage-Grouse<sup>6</sup> (Version 1.0, October 2018; hereafter HQT Technical Manual) available at the Program's website (<https://sagegrouse.mt.gov/Team>).

*For term definitions, please refer to the Conservation Project User Guide's [Glossary](#).*

## 1.2. Reasons for Submitting a Conservation Project

Montana's Mitigation System provides an approach to mitigation decision-making that incentivizes voluntary conservation measures that strive to maintain, enhance, restore, expand, and benefit sage-grouse habitat and populations to avoid a future ESA listing of sage-grouse. Therefore, conservation projects are vital for the successful implementation of the Mitigation System. Program consultation is necessary for all projects when located entirely or partially on state or federally designated sage-grouse habitat *and* that require a state or federal permit. Within the Mitigation System, there are two primary types of projects:

- **Conservation Projects:** projects which remove or limit threats to sage-grouse habitat quantity and/or quality through preservation, restoration, or enhancement actions.

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<sup>6</sup> Montana Sage Grouse Habitat Conservation Program. 2018b. Montana Mitigation System Habitat Quantification Tool Technical Manual for Greater Sage-Grouse. Version 1.0. Montana Department of Natural Resources and Conservation, Helena, MT. Available at: [https://sagegrouse.mt.gov/documents/MT\\_HQT\\_Oct2018v1p0\\_09Oct2018.pdf](https://sagegrouse.mt.gov/documents/MT_HQT_Oct2018v1p0_09Oct2018.pdf) (4/8/2022).

- **Development Projects:** projects which include the conversion of formerly suitable habitat to grasslands, croplands, mining, well pads, roads, or other physical disturbance that renders the habitat unusable for sage-grouse. **Development projects should not be entered as conservation projects.**

If a proposed project is determined to be a development project, project proponents will need to follow the instructions described in the Development Project User Guide.

If a proposed project is determined to be a conservation project, project proponents then need to identify their reason(s) for submitting their project to the Program for review and/or consultation ([Table 1](#)):

1. Stewardship Account Grants: “I want to apply for a Stewardship Account grant.”
  - Project proponents interested in applying for a Stewardship Account Grant to fund the implementation and maintenance of a conservation project.
  - Project proponents may submit their proposed projects through a request for proposals issued by the Program under Montana’s Stewardship Account granting process.
  - Stewardship Account Grant projects may include preservation, restoration, and/or enhancement activities, in combination or individually.
2. Permittee-Responsible Mitigation: “I want to offset the impacts of development projects.”
  - Project proponents interested in conducting their own conservation projects to offset impacts to sage-grouse habitat from development projects.
  - These projects are implemented and maintained without the use of funding from the Stewardship Account.
  - Project proponents are responsible for the financial obligations associated with implementing and maintaining the conservation project(s) to successfully offset the impacts from the associated development project(s).
  - Permittee-Responsible Mitigation projects may include preservation, restoration, and/or enhancement activities, in combination or individually.
3. Consultation needed for state or federal permit applications: “My project is located in sage grouse habitat, but its primary purpose is not sage grouse mitigation.”
  - Project proponents requiring state and/or federal authorization or permits for projects located within designated sage-grouse habitat but that are not interested in generating credits because of eligibility.
  - These projects are implemented and maintained without the use of funding from the Stewardship Account.
  - These projects may include conservation activities beneficial to sage-grouse habitat but that may not be implemented for the primary purpose of sage-grouse habitat conservation or mitigation.

After determining the primary reason for submitting a conservation project, project proponents will then need to determine if their project is located within designated sage-grouse habitat ([Section 2. Getting Started](#)). From there, they can navigate to the appropriate section within this document for more

instructions on the project submission process as it pertains to the required workflow associated with their given project submission reason ([Table 1](#)).

**Table 1.** Contents of the Conservation Project User Guide document help project proponents determine which section (and associated pages) they should review based on their reason(s) for submitting a conservation project for consultation with the Program.

<b>Conservation Project User Guide Contents</b>	
<p><b>Section 2. Getting Started</b></p> <p>Pages 9-13</p>	<p>Information for All Conservation Projects:</p> <ul style="list-style-type: none"> <li>➤ Workflow for determining if consultation with the Program is necessary</li> <li>➤ Website access and orientation</li> <li>➤ Overview of project submission process</li> </ul>
<p><b>Section 3. Stewardship Account Grants</b></p> <p>Pages 14-30</p>	<p>Pre-Application Proposal Process:</p> <ul style="list-style-type: none"> <li>➤ Proponents interested in applying for funding of a conservation project from the Stewardship Account.</li> <li>➤ Projects may include preservation, restoration, and/or enhancement activities, in combination or individually.</li> </ul>
	<p>Complete Application Proposal Process:</p> <ul style="list-style-type: none"> <li>➤ Proponents who have submitted a Pre-Application Proposal and have received their Preliminary Review Report from the Program may decide to move forward with completing the application for a Stewardship Account Grant.</li> </ul>
<p><b>Section 4. Permittee-Responsible Mitigation Projects</b></p> <p>Pages 31-43</p>	<p>Creating a new permittee-responsible mitigation project:</p> <ul style="list-style-type: none"> <li>➤ Proponents interested in conducting their own conservation project(s) to offset impacts to sage-grouse habitat from development project(s).</li> <li>➤ Projects may include preservation, restoration, and/or enhancement activities, in combination or individually.</li> </ul>
<p><b>Section 5. Conservation Project's Primary Purpose is Not Sage Grouse Mitigation</b></p> <p>Pages 44-55</p>	<p>Creating a new project when the primary purpose is not sage-grouse mitigation:</p> <ul style="list-style-type: none"> <li>➤ Proponents requiring permits for projects located in designated sage-grouse habitat but interested in generating credits.</li> <li>➤ Projects may include conservation activities beneficial to sage-grouse habitat but not implemented for the primary purpose of sage-grouse habitat mitigation.</li> </ul>

### 1.3. Conservation Project Types

There are three conservation project types within the Mitigation System and are not dependent on the proposed project's reason for Program review and/or consultation.

#### 1. Preservation Projects

- Projects which remove a threat to, or prevent the decline of, sage-grouse habitat.
- They support the avoidance of future sage-grouse habitat loss or fragmentation by a voluntary or legal removal or preventative action of identified threats such as land subdivision or land conversion.
- They may be created through perpetual conservation easements, conservation leases, or contractual lease agreements.

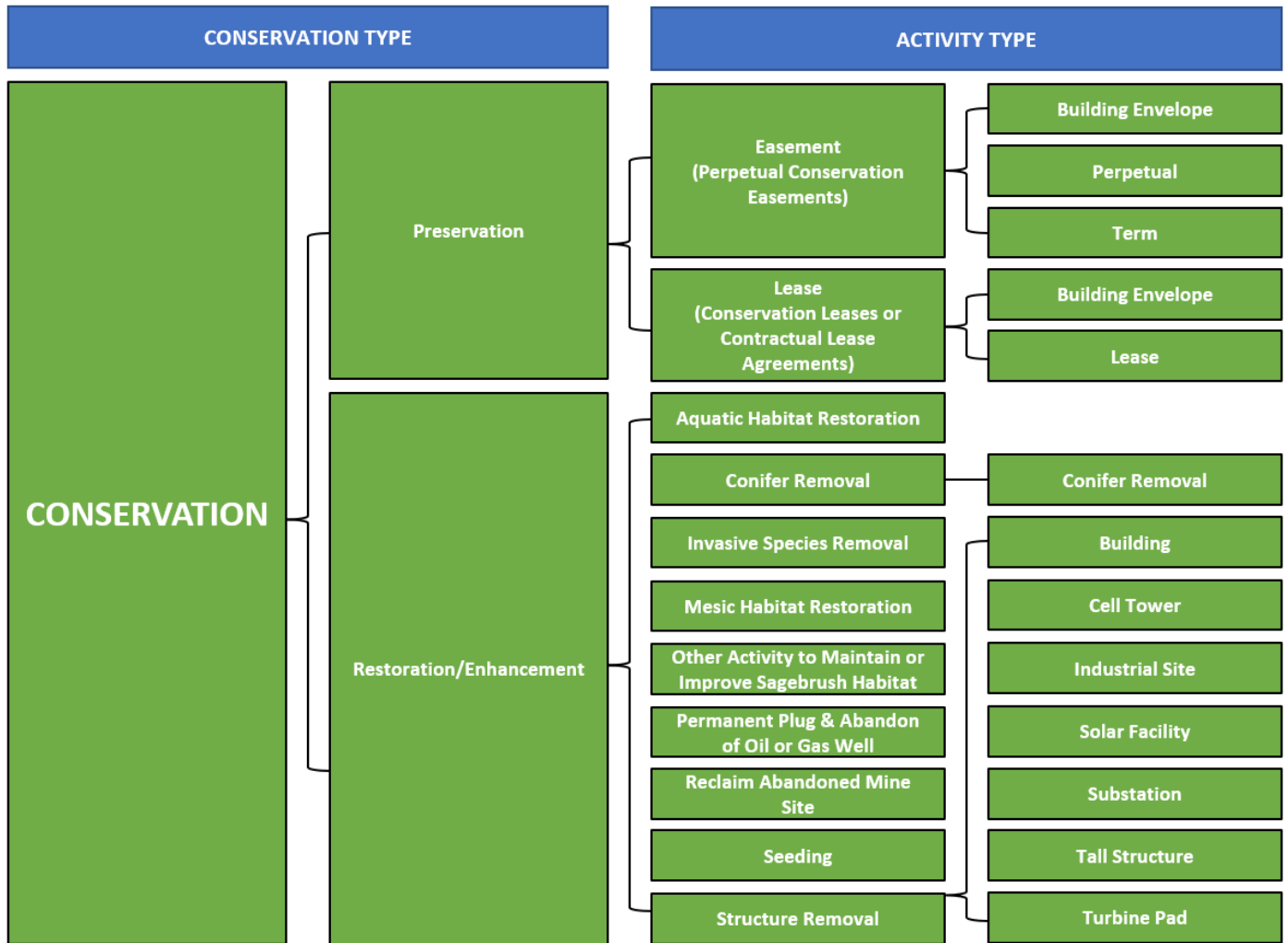
#### 2. Restoration Projects

- Projects which assist in the recovery of sage-grouse habitat that has been degraded, damaged, or destroyed to the approximate pre-degradation conditions.
- Examples include, but are not limited to:
  - The establishment of suitable sage-grouse habitat on abandoned mining claims or industrial sites,
  - Eradication of invasive plant species,
  - Removal of encroaching conifers,
  - Removal of abandoned or obsolete anthropogenic structures (e.g., power lines, towers),
  - Conversion of cropland back to rangeland with a sagebrush component, or
  - Restoration of wet meadows by restoring proper hydrology and plant communities.

#### 3. Enhancement Projects

- Projects which increase or improve the quality and/or quantity of degraded sage-grouse habitat or which increase the quality of sage-grouse habitat over its current value.
- Examples include, but are not limited to, improvement of existing suitable sage-grouse habitat by:
  - Adding a sagebrush component to non-native plant communities,
  - Adding a sagebrush component to existing rangeland, or
  - Increasing native forb diversity in mesic areas.

Within the Program's website, each conservation project type has associated activity types and sub-types. See [Figure 1](#) for a visual representation of the project type and activity type associations. See [Table 3](#) for a list of associated activity types and their accepted feature types (e.g., point, line, polygon).



**Figure 1.** Conservation project types are associated with various activity types which aim to remove or limit threats to sage-grouse habitat quantity and/or quality.




## 2. GETTING STARTED: INFORMATION FOR ALL CONSERVATION PROJECTS


All proponents of conservation projects must determine if their project is located entirely or partially within designated sage-grouse habitat. If projects are not at least partially located within designated sage-grouse habitat, they will not need to be submitted to the Program for review or consultation. This section provides information for determining a projects proximity to designated sage-grouse habitat and provides an orientation for the Program’s website for conservation projects.

### 2.1. Determining if Consultation is Necessary

The Program’s website home page can be accessed without having to login. When you visit the Program’s website, you will see links at the top of the webpage that will take you to informational pages about the Program, MSGOT, Grants (i.e., Stewardship Account Grants), Frequently Asked Questions (under the Help tab), and a map of designated sage-grouse habitat (Map tab). These informational pages can also be accessed by clicking on the links under the images located at the center of the home page.

To determine whether your conservation project would occur in designated sage-grouse habitat, please review the Montana Sage Grouse Habitat Conservation Map (hereafter, Habitat Conservation Map) by clicking on the **‘Map’** link located at the top of the Program’s website. The Habitat Conservation Map allows you to zoom in on your area of interest by using the **‘Zoom’** buttons (‘+’, ‘-’) on the upper left side of the map. Use the mouse cursor and hover over each button to see a pop-up window with a description of each button’s function. You can search for your proposed project area by using the **‘Search’** bar above the **‘Zoom’** buttons. This allows for searching by area name (e.g., Glasgow, MT), by Township, Range land parcels by entering “<township number><township direction> <range number><range direction>” (e.g., 2S 4W), and by latitude and longitude by entering “<latitude>, <longitude>” (e.g., 46.8174, -109.3773).

You can select different map backgrounds (e.g., basemaps, views) by clicking on one of the background layers from the legend on the top right side of the map (). The available backgrounds are Aerial, Street, and Terrain views.

If you determine that your project is outside of designated sage-grouse habitat, you are encouraged to either take a screen shot of the map location or print the map for documentation to submit to the state permitting agencies, if required. To print the map, click on the **‘Print’** button (). You will have the ability to choose between Landscape, Portrait, or Custom Extent. The printed map will exhibit the layers you have currently selected and displayed on the map. You can then attach this map along with your state permit application.

### 2.2. Logging in to the Program’s Website

If consultation with the Program is necessary because your project is at least partially located within designated sage-grouse habitat and you either 1) need to obtain a state permit or authorization and/or 2) you would like to create credits through one of the avenues described above, you will need to enter project information into the Program’s website. This will require setting up a secure login to access the

project application side of the website. It is strongly recommended that you access and use the Program's website on a desktop or laptop computer. Mobile devices are not recommended due to screen resolution limitations. No special software is needed. If you have a problem entering information or saving data on the website, try using a different browser such as Chrome or Firefox.

**\*Information Security Notice\***

The Program's website does not contain any Personally Identifiable Information or classified information.

The Program's website **is access protected** (through ePass and Okta), and along with role assignment of users, prevents users from accessing other users' information.

Users' information will never be sold.

**2.2.1. Create a Secure Login Account for Montana.gov through the <https://sagegrouse.mt.gov/> website.**

To access the project application side of the Program's website, you will need to login with a secure account. If this is your first time logging into the Program's website, you will need to create an Okta account for <https://login.mt.gov> through the Program's website. Through this secure login, the State of Montana provides a convenient and secure service with the following benefits to Montana's businesses and citizens:

- Allows access to all authorized government services with one username and password,
- Provides customization options for <https://login.mt.gov> to personalize the services page,
- Shows customers other government services that may be useful to them, and
- In the future, will grant customers access into authorized federal government services.

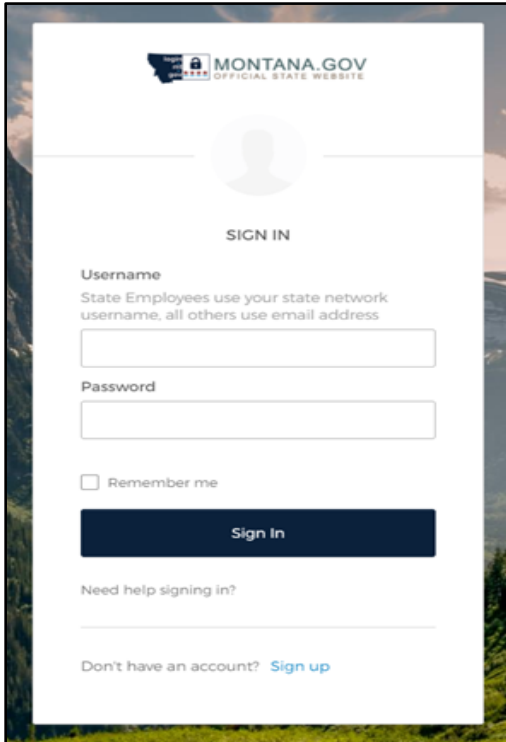
Creating an account is easy and allows you to manage your project information in a secure environment using one username and password. Save this information and keep it handy as you will need it to login each time you return to the Program's website. If you forget your username or password, you can request a new password or get username hints on the login site. This information will be sent to the email identified when you created your account.

If you currently have an ePass account:

1. Click on the '**Login**' button on the dark gray menu bar in the upper right corner of the Program's website
2. Activate your new Okta account by entering your ePass username and password when prompted.
3. Your username is the same email address previously used with your ePass account.
4. You will then receive an email containing a link to create a new password for your newly activated Okta account.

If you do not have an ePass account:

1. Click on the **‘Login’** button on the dark gray menu bar in the upper right corner of the Program’s website.
2. Click the **‘Sign Up’** link to create an Okta account.
3. You can also visit <https://login.mt.gov> to create an account or login via Microsoft, Google, or Facebook identity providers.



**NOTE:** After activating or creating your new Okta account, you may need to return to the Program’s website and login again.

Please contact the Program at [sagegrouse@mt.gov](mailto:sagegrouse@mt.gov) for assistance.

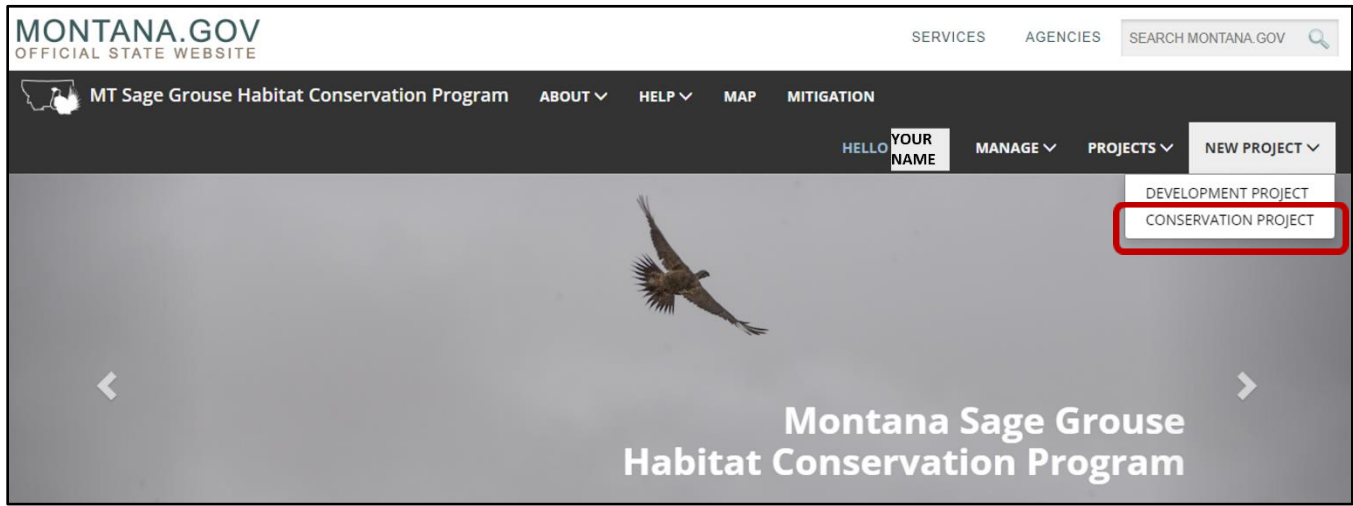
### 2.2.2. How to Create a New Conservation Project

After you are logged into the Program’s website, you will see additional tabs appear in the dark gray menu bar at the top of the website. These tabs will be helpful in accessing your account and project submission information.

To create a new conservation project application:

1. Click on the **‘New Project’** tab in the upper right corner of the dark gray menu bar.
2. Select **‘Conservation Project’** from the drop-down list.

3. You will then be directed to the beginning of the conservation project application page: **‘Propose a conservation project in sage grouse habitat’**.



### 2.3. Overview of the Conservation Project Submission Process

The general process for submitting projects to the Program for review and/or consultation is similar for all types of conservation projects. The following outlines the main pages you will encounter during the application process for your proposed project:

1. Instructions

- The Instructions page helps guide you through the project submission/application process
- You can return to this page for guidance at any time during the application process by clicking on the **‘1. Instructions’** tab along the left side of the page.
- There are links to many helpful documents on this page, including an [FAQ](#) and [Information About the Montana Mitigation HQT Basemap](#).

2. Basics

- The Basics page allows you to information about your proposed project, such as a detailed description of the project’s proposed activities.
- You will also enter contact information and your reason for submitting the project.

3. Activities

- The Activities page allows you to submit the location and type of your project’s proposed activities through an interactive map.
- You will also enter some additional information for each proposed activity.
- A proposed project may have more than one activity and activity type.
  - For example, you may be proposing a conservation easement with reseeded portions. In this case, you should have two activities entered on the map.

4. Questionnaire

- The Questionnaire page allows you to answer specific questions based on the activity types you selected for the proposed activities entered on the Activities page.
- The Questionnaire page is dynamic, and the content is driven by the content entered on the Activities page.

5. Attachments

- The Attachments page allows you to add supporting files, such as documents, photos, or permit applications, to provide more information about your project.

6. Review & Submit

- The Review & Submit page provides you an opportunity to review a summary of your proposed project before you submit it for review.

**NOTE:** As long as you click ‘**Save**’ before leaving each page of the project application, you do not need to complete the application in one session. Your work will be saved and available to you the next time you login.

**HELP:** If you run into any problems or have questions, please contact the Program at 406-444-6340 or email the Program at [sagegrouse@mt.gov](mailto:sagegrouse@mt.gov).

### 3. STEWARDSHIP ACCOUNT GRANTS

This process is intended for applicants interested in applying for funding from the Stewardship Account through a Stewardship Account Grant. Stewardship Account Grant applications may include multiple components containing preservation, restoration, and/or enhancement activities capable of increasing the quantity and/or quality of sage-grouse habitat. Common Stewardship Account Grant applications may include perpetual conservation easements, conservation leases, contractual lease agreements, or restoration projects such as reseeded and conifer encroachment. No individual component (preservation, restoration, or enhancement) is required to apply for funding from the Stewardship Account. However, all proposed credit-generating projects must meet certain eligibility requirements ([Table 2](#)).

**Table 2.** Eligibility requirements for credit-generating projects.

Eligibility Requirements	Criteria
<p><b>Additionality:</b> Conservation actions are additional.</p>	<ul style="list-style-type: none"> <li>▪ Credit provided for outcomes that exceed baseline, including avoided loss of sage-grouse or sage-grouse habitat</li> <li>▪ Exceeds pre-existing, non-EO related legal obligations</li> <li>▪ Use of public conservation funds other than from the Stewardship Account may be eligible to generate credits (determined in case-by-case basis)</li> </ul>
<p><b>Duration and Durability:</b> Project benefits are durable.</p>	<ul style="list-style-type: none"> <li>▪ Legal protection of site</li> <li>▪ No imminent threat</li> <li>▪ Benefits expected to meet or exceed duration of impact</li> <li>▪ Financial assurances</li> <li>▪ Site plan</li> </ul>
<p><b>Appropriate Site Selection and Conservation Actions:</b> Consistent with <i>Policy Guidance Document</i> and respective federal requirements.</p>	<ul style="list-style-type: none"> <li>▪ Located within Core, Connectivity, or General Habitat or the equivalent designations of federal land management agencies (e.g., BLM)</li> <li>▪ Will “maintain, enhance, restore, expand, or benefit sage-grouse habitat and populations”</li> <li>▪ Consistent with EO-12-2015, the Act, administrative rules, and MSGOT guidance; consistent with federal requirements if the project is on federal land.</li> </ul>

Applications for Stewardship Account Grants go through a two-step process: 1) a Pre-Application Proposal and 2) a Complete Application Proposal. Following the submission of a Pre-Application Proposal, the Program begins a preliminary review that results in the Preliminary Review Report. During the preliminary review, the Program uses the Habitat Quantification Tool (hereafter, HQT) and applicable policy to estimate the amount of habitat quality and quantity (e.g., functional acres gained, credits) the proposed project could be expected to produce for the lifetime of the projects (for more

details, see the Policy Guidance Document and the HQT Technical Manual). The Program compiles those results along with other ecological metrics related to the proposed project into a Preliminary Review Report and shares the report with potential Stewardship Account Grant applicants. After receiving and reviewing the report, applicants can decide to continue with a Complete Application Proposal where additional information will be required for MSGOT review or decide not to continue with the process.

### **3.1. Creating a New Grant Application: Pre-Application Proposal Process**

The Program requests the following information to prepare a Preliminary Review Report for potential applicants who are considering whether to apply for grant funding from the Stewardship Account.

**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 materials, including final spatial data and supporting information.

Pre-Application Proposals must be submitted using the Program’s website (<https://sagegrouse.mt.gov/>). This will allow sufficient time for the Program to complete HQT calculations and return Preliminary Review Reports to support potential applicants’ decision to submit a Complete Application Proposal.

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

The following is a complete guide for those initiating a proposed project for funding from the Stewardship Account.

#### **3.1.1. STEP #1: Instructions**

The Instructions page will help guide you (i.e., the project applicant) through the submission process. There are links to many helpful guides including the [FAQ](#) and [Information About the Montana Mitigation HQT Basemap](#) (see screenshot below).

You can return to this page for guidance at any time by clicking on the ‘**1. Instruction**’ button on the left side of the page. Once you have reviewed the Instructions page, click the blue ‘**Continue**’ button on the lower right side of the page to proceed to the Basics page.



**1. Instructions**

2. Basics

3. Activities

4. Questionnaire

5. Attachments

6. Review & Submit

## Instructions

The project proposal submission process has a few parts:


**Basic Information About Your Project**  
Describe your project involving permitted activities proposed in sage grouse habitats designated as core (blue), general (green), or connectivity (light-blue) habitats. If you're not sure which habitat zone your project is in, click the map to the right before entering Basic Information. For program details please see our FAQ.


**Activities**  
TBD

**Questionnaire: Project and Activity Description Details**  
Once your proposed activities are mapped and described, you will need to answer some questions based on your activity types.

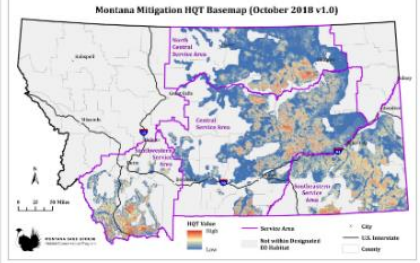
**Save Your Project for Later, Save and Continue, or Submit for Review**  
You'll have a chance to review a summary of your proposed project before you submit it for consultation. You do not need to complete your submission in one session – your work will be saved and the next time you log in, you'll be able to resume where you left off.

**Help**  
[Information About the Montana Mitigation HQT Basemap](#)  
If you run into any snags or have questions, please contact us.





Make sure your project is in sage grouse habitat



Mitigation HQT Basemap (October 2018 v1.0)

### 3.1.2. STEP #2: Basics

The Basics page begins the process of describing and documenting your proposed project. It is important to be as thorough as possible in your answers to avoid the need for submitting additional information at a later date, which will slow down the review process.

On this page you will be able to provide: a name for your proposed project, a thorough description of your proposed project, contact information, credit owner contact information, and the purpose for conducting your proposed project. Please review the following sections for more information about each piece of information requested on the Basics page.

#### 3.1.2.1. Project Information:

On the Basics page, you will need to create a **‘Project Name’** and provide a description of the proposed project (see screenshot below).

The Program encourages you to be as descriptive as possible when detailing your proposed project. The Program needs to understand what habitat benefits are proposed and the duration of those benefits on the landscape. More information is always better than less information. If the Program is not provided with sufficient information, the Pre-Application Proposal will be returned to you and the Program will ask you to provide the missing information.



For a streamlined review process, the Program recommends you include the following items in the project description:

- Describe the purpose of the project and its proposed activities,
- If the project includes a restoration or enhancement component, describe the methods (and machinery, if applicable) that will be used during implementation and/or monitoring phases,
- Describe the current landscape and the expected post-project implementation landscape,
- Describe the expected time frames for the implementation and/or monitoring phases, and
- Provide information about the necessary permits (if applicable) for your project implementation.

**Project Information**

**Project Name:**

**Description:**

*Describe your complete project, not just portions of the project on federal or state land.*

**3.1.2.2. Project Contact Information:**

The contact information entered in this section should be of the person whom the Program corresponds with throughout the review process. The website should auto-fill the contact information for you using the information you provided for your login access (either through ePass or Okta). If needed, please update your project contact information, including email, phone, mailing address, and if applicable, additional contact information (see screenshot below).

**Project Contact Information**

**Name:** <Your Name>

**Email:**  **Phone:**

**Mailing Address:**

**Additional Contact Info:**

*Describe and provide phone/email for people other than yourself that we might need to coordinate with while reviewing your project*

3.1.2.3. Additional Information:

In the Additional Information section, please identify the primary reason for submitting your proposed project to the Program for review (see screenshot below). Please be sure to select **‘I want to apply for a Stewardship Account grant’** from the drop-down as this is a pre-application proposal for a Stewardship Account Grant.

Additional Information

Why are you submitting a credit project to the Sage Grouse Habitat Conservation Program?  
Please choose one:

--Select a statement below--

--Select a statement below--

My project is located in sage grouse habitat but its primary purpose is not sage grouse mitigation I want to offset the impacts of development projects

I want to apply for a Stewardship Account grant

3.1.2.4. Credit Owner:

The official Credit Owner for Stewardship Account Grant projects is MSGOT. Please scroll through the drop-down list for **‘Customer’** to find and select **‘MSGOT’**.

Once you have completed the Basics page, click the blue **‘Save & Continue’** button on the lower right side of the page to proceed to the Activities page or click **‘Save’** if you need to exit your application.

Credit Owner

Customer: MSGOT

Select a customer from the dropdown list. If your desired option is not available, please add it to the list by checking this box

Additional Contact Name (Optional): Last Name, First Name

Email (Optional): Phone (Optional):

Mailing Address (Optional): Street Address City -- State -- Zip

Additional Contact Info (Optional):

Describe and provide phone/email for people other than yourself that we might need to coordinate with while reviewing your project

Save Save & Continue

### 3.1.3. STEP #3: Activities

#### 3.1.3.1. Activity Types:

Selecting the appropriate activity type for your proposed project is very important. The website will tailor the questions presented later in the Questionnaire page based on the specific activity type selected. If you select the wrong activity type, you will be prompted to answer potentially non-relevant questions about your project and you may miss out on questions required for an accurate review of your project. This may result in a prolonged review process. This may also require you to re-enter all your information due to the information being specifically related to a given activity type.

Applications for a Stewardship Account Grant may include preservation, restoration, and/or enhancement project types. An applicant may propose a project which includes multiple activity types. For example, a conservation project may contain a conservation easement with a reseeded component. This would qualify as a preservation and enhancement project. The applicant must include spatial data and information for all proposed activities.

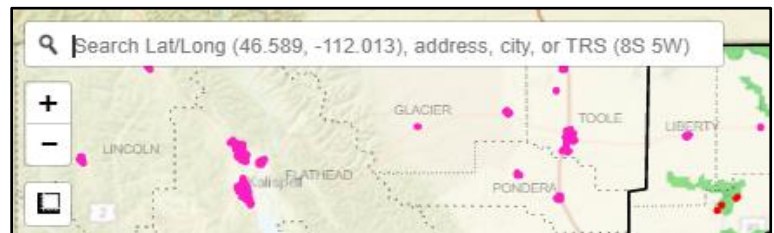
**Table 3** provides additional information useful for determining your activity type(s). Each activity type allows for a specific feature type (i.e., point, line, polygon) to spatially represent the proposed activity. For example, burying a powerline is only applicable with a line feature. However, removing conifers can only be depicted using a polygon feature.

If you are unsure which activity type to select for a given proposed activity, contact the Program to discuss which type(s) best represents the activities associated with your proposed project.

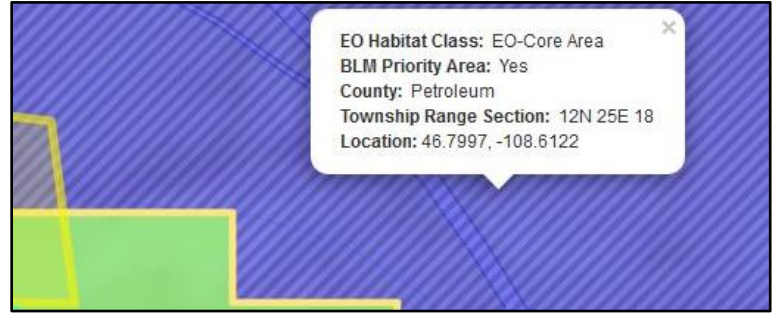
#### 3.1.3.2. Activities Page Map:

The Activities page is intended for you to provide accurate spatial data of your proposed project activities to the Program for review. It is critical that the spatial data correctly depicts the shape, scale, and location for the proposed project activities. Follow the instructions below to add or create your spatial data:

1. Within the Activities page map, navigate to your project's general location by using the 'Search' bar in the upper left corner and the 'Zoom' buttons. You can search by street address, Township and Range (PLSS), town name, etc.

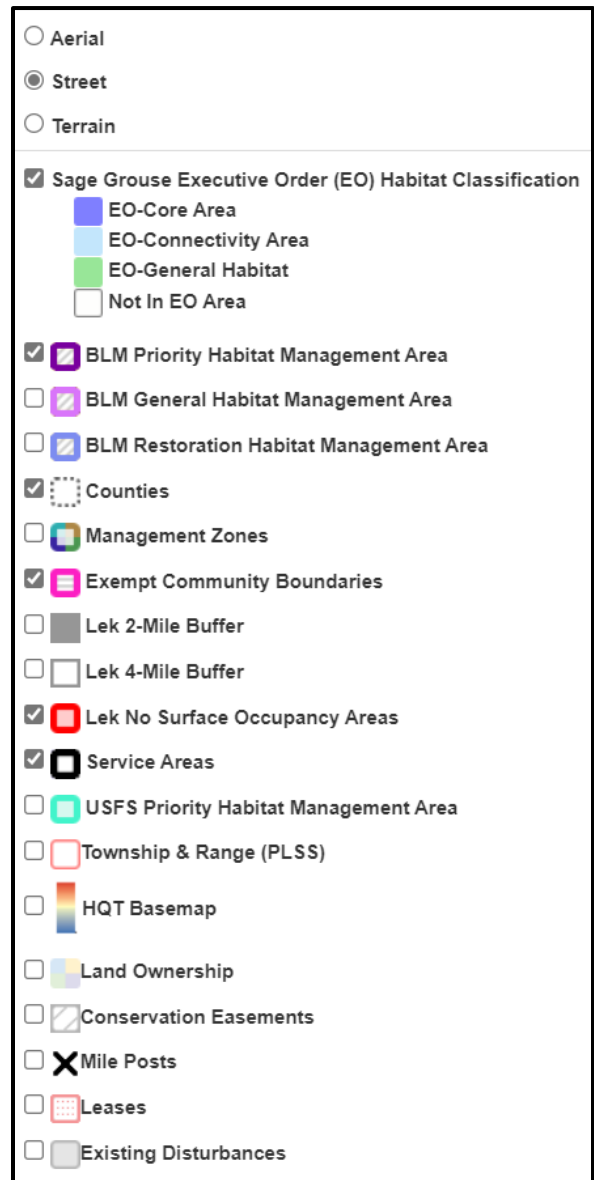


2. **NOTE:** the mouse cursor can be used to display information for a given location on the map by clicking your mouse anywhere on the map. The information displayed in the pop-up window is not for a given feature but is based on the where the cursor is located.



3. Get to know the Activities page map to customize your data entry experience:

- a. There are many data layer options to help you locate your proposed project. Hold your cursor over the **'Layers'** button (☰) at the top right corner of the map to open the legend and layers window. In this window, you can select layers to display on the map. The first three radio-button selections (Aerial, Street, and Terrain) offer different background basemap options. In some cases, viewing topographical details might be easier if other data layers are switched off.
- b. The Program encourages you to experiment to find the combination of data layers that best suits your map viewing preferences and data entry purposes.
- c. Additional data layers in the menu that can be toggled on and off are shown in the screenshot to the right.



### 3.1.3.3. *Entering Spatial Data:*

There are two options for entering spatial data depicting your proposed project activities:

1. Upload GIS files (e.g., upload spatial data)
2. Draw proposed activities using the **‘Drawing Tools’**

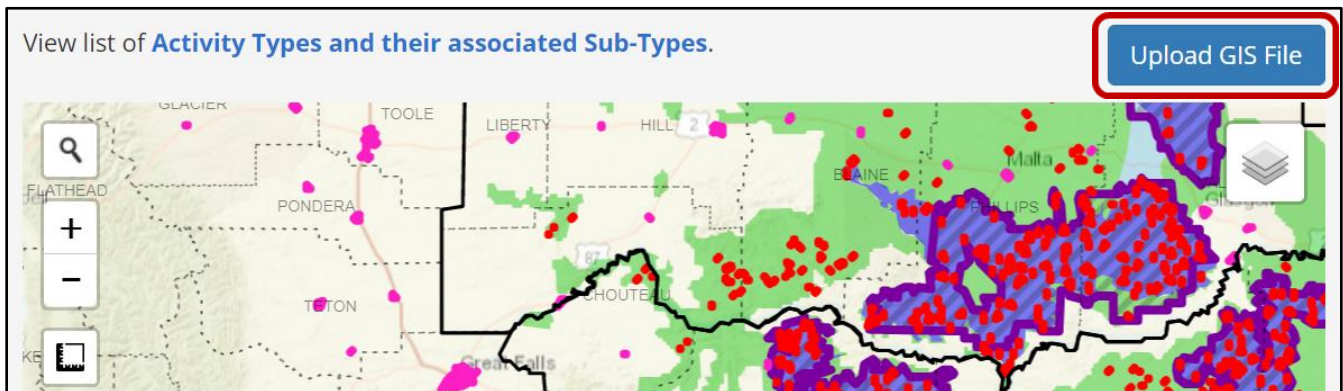
#### 3.1.3.3.1. *Option 1: Uploading Spatial Data*

Uploading spatial data allows you to submit your proposed project’s spatial data by uploading shapefiles or geodatabases generated using Geographic Information Systems (GIS) software (e.g., ArcGIS, QGIS). Spatial data files need to be compressed (i.e., zipped) before uploading. After successfully uploading the compressed file(s), the spatial data will be displayed on the map. Note: accepted GIS file types that can be uploaded in compressed files include Geodatabase, Keyhole Markup Language, or Shapefile.

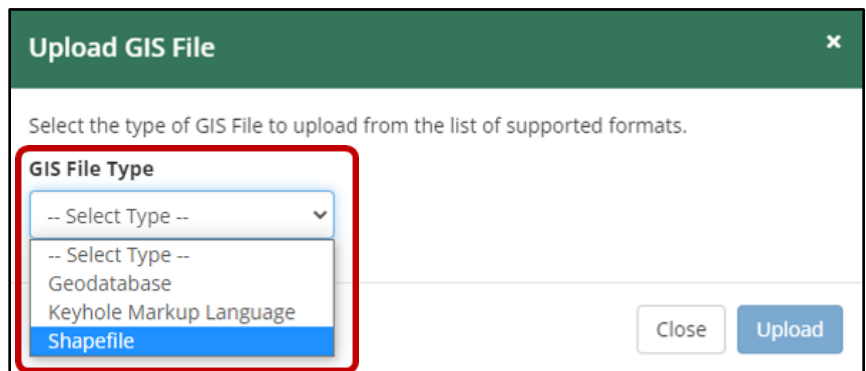
#### **Option 1: Uploading Spatial Data Example**

The following example starts with a compressed file of a shapefile created using ArcGIS Pro. A single feature requires several files to display. For this reason, spatial data must be compressed to ensure all necessary associated files are included in the upload for proper display of the uploaded shapefile.

1. Click the blue **‘Upload GIS File’** button above the map



2. In the **‘Upload GIS File’** pop-up window, select the **‘GIS File Type’** from the drop-down list that represents the format of the GIS file you intend to upload.





3. Click on **‘Choose File’**.

4. Locate where you saved your data to select it for upload.

5. Click the blue **‘Upload’** button in the bottom right of the pop-up window.

6. Your project will display as a blue-hatched polygon on the Activities page map (see screenshot below).

7. In the box under **‘Name’**, provide a name for the polygon feature.

8. Click on the **‘Select type’** drop-down list to select the most appropriate Activity Type for your proposed activity.

9. If applicable, provide any notes in the **‘Notes’** column.

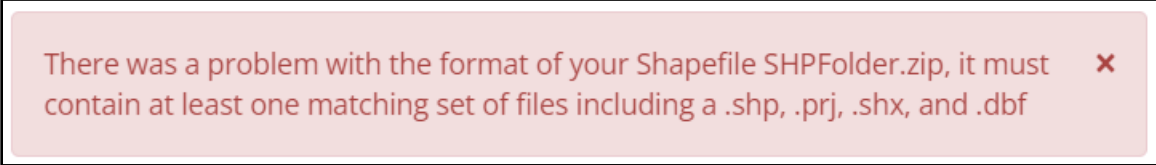
- a. Width (ft) is required only for line features (e.g., pipeline, road). A minimum default of 10 feet is necessary in order for the line feature to be adequately captured during the HQT analysis.

10. Once you have completed the Activities page, click the blue **‘Save & Continue’** button on the lower right side of the page to proceed to the Questionnaire page.

Name	Feature	Type	*Width (ft)	Length (ft)	Area (acres)	EO Habitat Classes	Counties	TRS	Ownership	Notes
	Polygon	-- Select type --			4,716.122	EO-Core Area	Garfield	Township 19 North, Range 41 East, Sectio... More	Montana State Trust Lands, Private, US Bureau of Land Management	

*\*Steps 6 through 10\**

11. NOTE: if you receive an error after attempting to upload the compressed GIS file (see screenshot below), make sure that the compressed folder contains at least the four mentioned file types: **‘.shp’, ‘.prj’, ‘.shx’, and ‘.dbf’**. Make sure to compress just the GIS files and *not* the file folder that contains them.



#### 3.1.3.3.2. Option 2: Drawing your Activities

This option allows you to use the Activities page map to create your project’s spatial data directly within the map. The Activities page map contains drawing tools located on the left side of the map. The drawing tools are designed to provide opportunities to draw the features of proposed activities using lines (↷), polygons (⬠), and points (📍). The full suite of map tools includes a **‘Search’** bar, **‘Zoom’** buttons (+, -), **‘Measurement’** tool (📏), **‘Print’** tool (🖨️), **‘View Fullscreen’** map option (🗖️), **‘Edit activity geometries’** tool (✎), and **‘Remove activity geometries’** tool (🗑️).

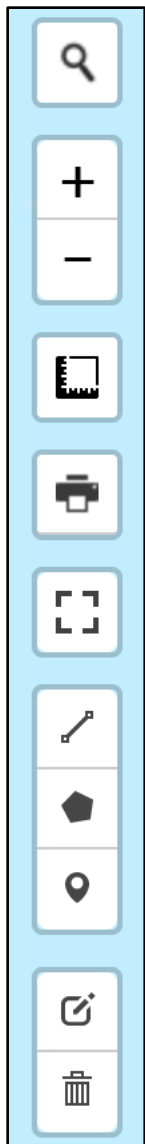
**NOTE:** While it is possible to draw the boundaries of your proposed project using the **‘Draw an activity as a polygon’** tool (⬠) within the Activities page map, it may be difficult to accurately depict the boundaries. Therefore, using Desktop GIS software (e.g., ArcGIS, QGIS) is recommended to create accurate GIS data to upload.

If you choose to draw the boundaries of your proposed project within the Activities page map using the **‘Draw an activity as a polygon’** tool, refer to the **‘Activities Page Map Tools’** section below.

Please consult the Program at [sagegrouse@mt.gov](mailto:sagegrouse@mt.gov) for assistance.

#### 3.1.3.3.3. Activities Page Map Tools

The Activities page map tools are found on the left side of the map (see diagram below). They are designed to allow you the opportunity to draw the geometries of your proposed project activities using lines, polygons, and points. In doing so, applicants unable to upload a GIS file illustrating their proposed project can use the Activities page map tools instead to include the required spatial data for their Pre-Application Proposal. Each tool and its description are described in further detail below for ease of use.



⇐ **Search Tool:** type a location, click enter to navigate map to specified location

⇐ **Zoom Tool:** click the ‘+’ or ‘-’ buttons to zoom map in or out

⇐ **Measurement Tool:** measure distances from point to point

⇐ **Print Tool:** print the map view

⇐ **View Fullscreen Tool:** expand the map view from embedded within the Activities page to a fullscreen view

⇐ **Drawing Tools:** draw geometries representing activities associated with a proposed project.

- The **Line Tool** for roads, pipelines, fences, etc.
- Use the **Polygon Tool** for buildings, crops, yards, area, etc.
- Use the **Point Tool** for perching, nesting deterrents.

⇐ **Edit Geometries Tool** or **Remove Geometries Tool:** edit or remove, respectively, any of the drawn geometries

#### 3.1.4. STEP #4: Questionnaire

The content presented in the Questionnaire page is determined based on the specific Activity Type(s) you selected in the previous step ([Section 3.1.3. Step #3: Activities](#)). The questions are intended to help guide the development of the Preliminary Review Report for a proposed grant application. Answer each question listed. See an example of the Questionnaire page for a perpetual conservation easement in the screenshot below.

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.





**Activity: Conservation Easement Boundary**

Type	Feature	Area	EO Habitat Classes	Counties	TRS	Ownership	Notes
Easement - Perpetual	Polygon	6,866.675 acres	EO-Core Area	Garfield	Township 19 North, Range 41 East, Sections 1, 2, 3, 4, 5, 8, 9, 10, 11, 12, 13, 14, 15, 16, 24<br... <a href="#">More</a>	Montana State Trust Lands, Private, US Bureau of Land Management	


**Questions:**


**Implementation dates:**  
*How long will the implementation of the activity take? Enter the date the implementation begins and the date implementation ends.*

Start:  

End:  

**Maintenance dates:**  
*How long will the project be on the landscape or how long will the activity occur? Enter the date the activities begin and the date regular operations or activities will stop.*

Start:  

End:  

### 3.1.5. STEP #5: Attachments

The Attachments page allows you to include files pertinent to your Pre-Application Proposal that include information not previously provided that may be useful for the Program’s preliminary review. However, see the [3.2.5. Review the Attachments](#) section of [Section 3.2. Complete Application Proposal Process](#) to determine the documents that do not need to be uploaded during the Pre-Application Proposal process.

Follow the steps below to attach files and refer to the screenshot below for additional context:

1. Click the **‘Choose Files’** button to navigate to and select the attachment you wish to provide
2. Select the file **‘Type’** of the attachment from the drop-down list
3. Provide a **‘Title’** for the attachment and a **‘Description’** of the attachment
4. To upload additional attachments, click **‘Save’** and the attachment will then appear under the Existing Attachments section of the Attachments page
5. To upload the selected attachment and continue to the Review & Submit page, click **‘Save & Continue’**

**Attachments**

Please upload documents pertinent to your proposed project, including Stewardship Plan, EAs, or other documentation identifying original boundaries. Multiple attachments can be uploaded at a time. Edit

---

**New Attachments**

**Attachment** Choose Files No file chosen

*Use CTRL + Click (PC) or Command + Click (Mac) to select multiple files at once. You must select a type. Click Save at the bottom of the page to upload all files.*

**Type** -- Not Assigned -- ▼  
*Additional attachment types have been added.*

**Title**

**Description**

---

**Existing Attachments**

There are currently no attachments uploaded for this project.

Save Save & Continue

**NOTE:** The Pre-Application Proposal precedes the Complete Application, which requires additional information.

If, after reviewing the Program’s Preliminary Review Report, you decide to submit a **Complete Application**, documents listed in [Section 3.2.5. Review the Attachments](#) should be submitted at that time. Such documentation will assist the Program during the evaluation process and, if selected for a Stewardship Grant by

### 3.1.6. STEP #6: Review & Submit

After you completed entering the information for your proposed project (Steps #1-5), review the information you have provided on the Review & Submit page. Please carefully review your project’s information to ensure you have 1) an accurate spatial representation of your project’s proposed activity or activities, 2) a thorough description of the proposed project, and 3) identified all aspects of the proposed project. 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 Pre-Application Proposal will proceed into a preliminary review by the Program. Once completed, a Preliminary Review Report will be provided to you so that you can determine whether to submit a Complete Application Proposal. The Preliminary Review Report will include preliminary metrics for the proposed project if implemented, including 1) the preliminary Raw HQT Score as computed by the HQT, 2) the estimated number of credits after application of 40% baseline to the Raw HQT Score, and the estimated Stewardship Account Grant amount based on the number of credits created at \$13/credit with a 3% Net Present Value applied.

If you decide to submit a Complete Application Proposal after receiving and reviewing the Program’s Preliminary Review Report, then you will have access to the proposed project from the same account you used to create the Pre-Application Proposal.

If you decide to modify your Pre-Application Proposal, you can access the project application from the same account they used to create the application. However, after the project application has been

submitted to the Program for preliminary review, the project application must be ‘returned’ to you by the Program prior to any editing you wish to make. Collaboration between the applicant and the Program will allow submitted projects to be modified. Feel free to contact the Program directly with any questions.

### 3.2. Complete Application Proposal Process

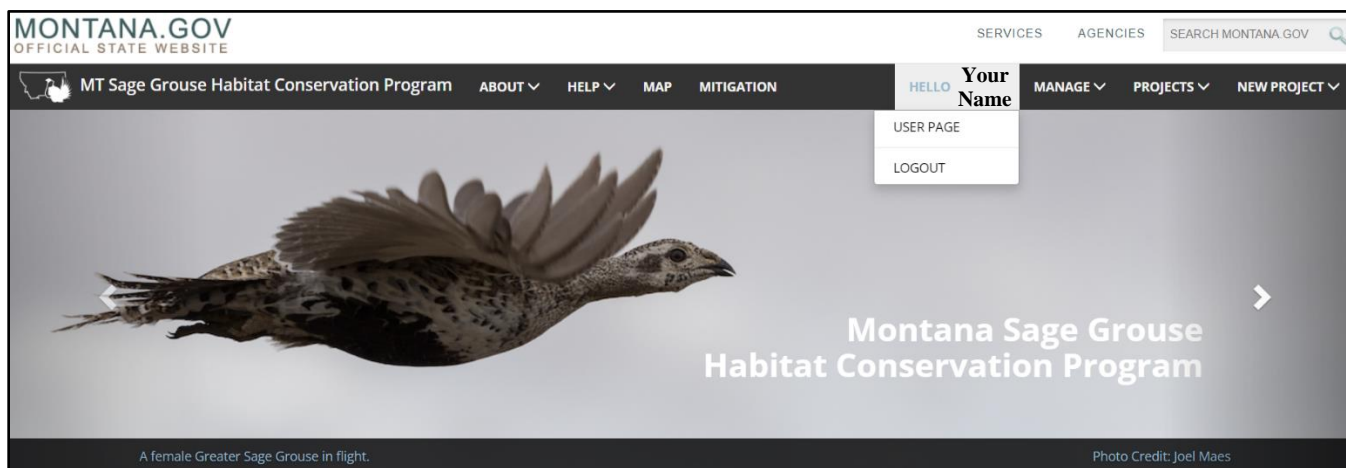
Project applicants who have received a Preliminary Review Report from the Program and are interested in continuing the Stewardship Account Grant application process should continue with submitting a Complete Application Proposal using the Program’s website at <https://sagegrouse.mt.gov/>.

If you opt to submit a Complete Application Proposal, you should return to the same Pre-Application Proposal project you submitted through the Program’s website and include additional information for a Complete Application Proposal.

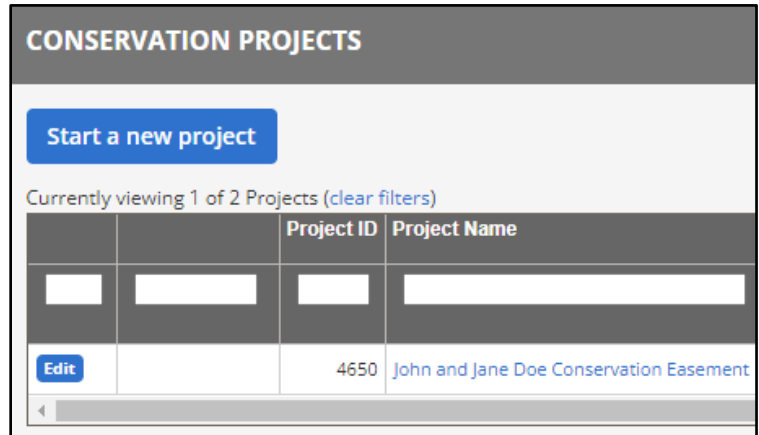
Once you have logged into your account on the Program’s website, you will have access to your existing project(s).

#### 3.2.1. How to Access Your Existing Project

1. Click the ‘**Hello <Your Name>**’ in the upper right corner of the main gray banner.
2. Click ‘**User Page**’ from the drop-down menu.



3. You will be directed to your User Page containing your contact information and any projects you have submitted or are currently in the process of submitting that have been previously saved to the Program’s website.
4. Locate your project by scrolling down to the **Conservation Projects** section on the User Page (see screenshot to the right).
5. Click on the ‘**Edit**’ button to open your project.
6. You will then be directed to the project’s page with access to all the project pages, including Instructions, Basics, Activities, Questionnaire, Attachments, and Review & Submit pages.



**NOTE:** Applicants who have submitted a project will not have access to that project until after the Program has reviewed it. Once a project has been fully reviewed, the Program will place the project into a ‘**Returned**’ or ‘**Information Request**’ status. Applicants will then be able to access that project for editing.

### 3.2.2. Review the Basics

Review the content about your proposed project on the Basics page and make any necessary edits. Consider that your project description adequately 1) describes problems or threats specifically identified at the project location, 2) describes what actions the project will undertake and how such actions will address the threats and satisfy the stated goals and objectives of the project, 3) describes the benefits to be achieved if the project is implemented, and 4) describes sage-grouse problems/threats being addressed by the project and why the project is necessary.

Click ‘**Save & Continue**’ when satisfied with the information on the Basics page.

### 3.2.3. Review the Activities

Review the Activities page. The final spatial data should correctly depict the area from where the proposed project will occur, including any modifications to the pre-application spatial data. Make sure that any areas encompassed by the project boundary that are not included in the easement or lease are excluded from the spatial data. For example, a building envelope should be excluded from the polygon representing the easement/lease. Restoration or enhancement areas may be included inside or outside your easement/lease boundary. Check for accuracy in the spatial data for restoration and/or enhancement projects, if any.

Click ‘**Save & Continue**’ when satisfied with the information on the Activities page.

### **3.2.4. Review the Questionnaire**

Review the answers provided to the questions on the Questionnaire page and make any necessary edits. Click **'Save & Continue'** when satisfied with the information on the Questionnaire page.

### **3.2.5. Review the Attachments**

Review the attachments you previously uploaded and add any additional attachments required for the Completed Application Proposal. Required documents/information needed for a Complete Application Proposal include:

1. Project Design/Maps
2. Letters of Support
3. Site Management or Stewardship Plan
4. Restoration Plan, if applicable
5. Enhancement Plan, if applicable
6. Site Monitoring Plan
7. Itemized Detailed Budget, include requested amount, matching sources of funding amount(s), and in-kind contribution amount(s)
8. Easement or Lease Terms
9. Market Appraisal (only required for easements)
10. Mineral Remoteness Review Report (only required for easements)
11. Easement or Lease Acknowledgement Form

#### *3.2.5.1. Site Monitoring Plan*

All conservation projects require monitoring to determine effectiveness relative to the statutory purposes of the Stewardship Act to conserve sage-grouse habitat and populations. Identify the monitoring program and protocols that are in place or will be in place to assess and quantify the results achieved by the project. Identify entities responsible for monitoring. Include both short-term and long-term monitoring plans. A Project Close-out Report will be required for each project upon completion to allow tracking of expenditures and attainment of results. Photos, summaries, etc., may be required. Approximately two pages of Narrative or less. Attach additional documentation if needed.

Follow the instruction in [STEP #5: Attachments](#) of the Pre-Application Proposal Process section above for instructions on uploading documents.

### **3.2.6. Final Review & Submit**

To assist with your final review prior to submitting, the Program's website generates the content on the Review & Submit page based on all the information your submitted in the previous pages. Before submitting, please carefully review your project to ensure you have 1) an accurate spatial representation of your entered activity or activities, 2) a thorough description of the proposed project, and 3) identified all aspects of the proposed project.

You may also decide to save your project and submit it at a later date. This can be done clicking the **'Save'** button and your project will be available to you through your **User Page** whenever you return to the website. Alternatively, you may decide to withdraw your project and can do so at any time. The project information will be stored on the website.

Click the **'Submit'** button on the lower right side of the page when satisfied with the information on the Review & Submit page.

## 4. PERMITTEE-RESPONSIBLE MITIGATION PROJECTS

For Permittee-Responsible Mitigation projects, the development project proponent (i.e., project developer) is responsible for ensuring that compensatory mitigation activities are completed and successful. The project developer works directly with the Program and MSGOT and is the entity that undertakes all mitigation actions and retains liability and responsibility to ensure offsets for debits are in place for the duration of the permitted activity. Examples of Permittee-Responsible Mitigation projects may include preservation, restoration, and/or enhancement projects. See [Table 2](#) for eligibility requirements for proposed credit-generating projects.

Following the submission of a Permittee-Responsible Mitigation project through the Program's website, the Program reviews the proposed project. During the review, the Program uses the HQT and applicable policy to estimate the amount of habitat quality and quantity (e.g., functional acres gained, credits) the proposed project could be expected to produce for the lifetime of the project (for more details, see the Policy Guidance Document and the HQT Technical Manual). The credits generated from the proposed project are then applied to 1) decrease the debit obligation if fewer credits are generated than debits or 2) eliminate the debit obligation altogether if an equal number or greater of credits are generated than debits.

Project developers should be aware that to generate credits, a mitigation site will need to occur in designated state or federal sage-grouse habitat (i.e., Executive Order 21-2015 or identified in federal land use plans) and meet all eligibility requirements ([Table 2](#)).

The Program requests the following information to accurately review a proposed Permittee-Responsible Mitigation project.

### 4.1. STEP #1: Instructions

The Instructions page will help guide you (i.e., the project developer) through the submission process. There are links to many helpful guides including the [FAQ](#) and [Information About the Montana Mitigation HQT Basemap](#) (see screenshot below).

You can return to this page for guidance at any time by clicking on the **'1. Instruction'** button on the left side of the page. Once you have reviewed the Instructions page, click the blue **'Continue'** button on the lower right side of the page to proceed to the Basics page.



**1. Instructions**

2. Basics

3. Activities

4. Questionnaire

5. Attachments

6. Review & Submit

## Instructions

The project proposal submission process has a few parts:

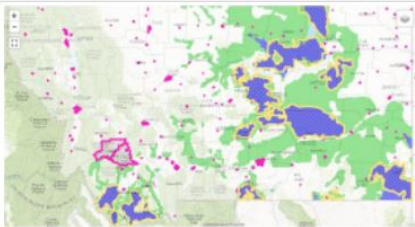
**Basic Information About Your Project**  
Describe your project involving permitted activities proposed in sage grouse habitats designated as core (blue), general (green), or connectivity (light-blue) habitats. If you're not sure which habitat zone your project is in, click the map to the right before entering Basic Information. For program details please see our [FAQ](#).

**Activities**  
TBD

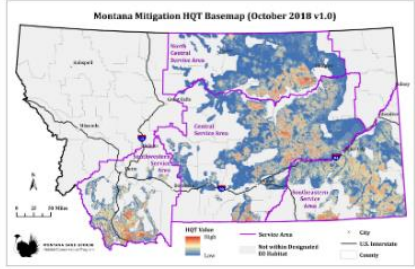
**Questionnaire: Project and Activity Description Details**  
Once your proposed activities are mapped and described, you will need to answer some questions based on your activity types.

**Save Your Project for Later, Save and Continue, or Submit for Review**  
You'll have a chance to review a summary of your proposed project before you submit it for consultation. You do not need to complete your submission in one session – your work will be saved and the next time you log in, you'll be able to resume where you left off.

**Help**  
[Information About the Montana Mitigation HQT Basemap](#)  
If you run into any snags or have questions, please contact us.



Make sure your project is in sage grouse habitat



Mitigation HQT Basemap (October 2018 v1.0)

Continue

## 4.2. STEP #2: Basics

The Basics page begins the process of describing and documenting your proposed mitigation project. It is important to be as thorough as possible in your answers to avoid the need for submitting additional information at a later date, which will slow down the review process.

On this page you will be able to provide: a name for your proposed project, a thorough description of your proposed project, contact information, credit owner contact information, and the purpose for conducting your proposed project. Please review the following sections for more information about each piece of information requested on the Basics page.

### 4.2.1. Project Information:

On the Basics page, you will need to create a **‘Project Name’** and provide a description of the proposed project (see screenshot below).

The Program encourages you to be as descriptive as possible when detailing your proposed project. The Program needs to understand what habitat benefits are proposed and the duration of those benefits on the landscape. More information is always better than less information. If the Program is not provided with sufficient information, the proposed project will be returned to you and the Program will ask you to provide the missing information.



For a streamlined review process, the Program recommends you include the following items in the project description:

- Describe the purpose of the project and its proposed activities,
- If the project includes a restoration or enhancement component, describe the methods (and machinery, if applicable) that will be used during implementation and/or monitoring phases,
- Describe the current landscape and the expected post-project implementation landscape,
- Describe the expected time frame for the implementation and/or monitoring phases, and
- Provide information about the necessary permits for your project implementation.

**Project Information**

**Project Name:**

**Description:**

*Describe your complete project, not just portions of the project on federal or state land.*

#### 4.2.2. Project Contact Information:

The contact information entered in this section should be of the person whom the Program corresponds with throughout the review process. The website should auto-fill the contact information for you using the information you provided for your login access (either through ePass or Okta). If needed, please update your project contact information, including email, phone, mailing address, and if applicable, additional contact information (see screenshot below).

**Project Contact Information**

**Name:** <Your Name>

**Email:**  **Phone:**

**Mailing Address:**

**Additional Contact Info:**

*Describe and provide phone/email for people other than yourself that we might need to coordinate with while reviewing your project*

### 4.2.3. Additional Information:

In the Additional Information section, please identify the primary reason for submitting your proposed project to the Program for review (see screenshot below). Please be sure to select **‘I want to offset the impacts of development projects’** from the drop-down list. You can then specify the development project ID for which these credits will be used or select **‘No’** when asked **‘Do you have a specific development project these credits should be applied to’**.

**Additional Information**

Why are you submitting a credit project to the Sage Grouse Habitat Conservation Program?  
Please choose one:

I want to offset the impacts of development projects

Do you have a specific development project these credits should be applied to?  Yes  No

What is the Development Project ID for which these credits will be used?

### 4.2.4. Credit Owner:

The Credit Owner is the party who will own the credits. If you or your company have previously entered any type of project (development or conservation) through the Program’s website, the name will be available for selection in the drop-down list of Customers (see screenshot below). Click on the desired name and the information will be auto-filled. If you are a new Customer, you can add your name to the list by checking the check-box and typing your name or company name in the text box that appears. The name will be stored and available in the list for your future project proposals. Add any additional contact information, if needed.

Once you have completed the Basics page, click the blue **‘Save & Continue’** button on the lower right side of the page to proceed to the Activities page or click **‘Save’** if you need to exit your application.

**Credit Owner**

**Customer:**

*Select a customer from the dropdown list. If your desired option is not available, please add it to the list by checking this box*

**Additional Contact Name (Optional):**

**Email (Optional):**

**Phone (Optional):**

**Mailing Address (Optional):**

**Additional Contact Info (Optional):**

*Describe and provide phone/email for people other than yourself that we might need to coordinate with while reviewing your project*

### 4.3. STEP #3: Activities

#### 4.3.1. Activity Types:

Selecting the appropriate activity type for your proposed project is very important. The website will tailor the questions presented later in the Questionnaire page based on the specific activity type selected. If you select the wrong activity type, you will be prompted to answer potentially non-relevant questions about your project and you may miss out on questions required for an accurate review of your project. This may result in a prolonged consultation process. This may also require you to re-enter all your information due to the information being specifically related to a given activity type.

Proposed projects may include preservation, restoration, and/or enhancement project types. A project developer may propose a project which includes multiple project types and activity types. For example, a proposed project may contain a conservation easement with a reseeding component. This would qualify as a preservation and enhancement project. The project developer must include spatial data and information for all proposed projects and associated activities.

[Table 3](#) provides additional information useful for determining your activity type(s). Each activity type allows for a specific feature type (i.e., point, line, polygon) to spatially represent the proposed activity. For example, burying a powerline is only applicable with a line feature. However, removing conifers can only be depicted using a polygon feature.

If you are unsure which activity type to select for a given proposed activity, contact the Program to discuss which type(s) best represents the activities associated with your proposed project.

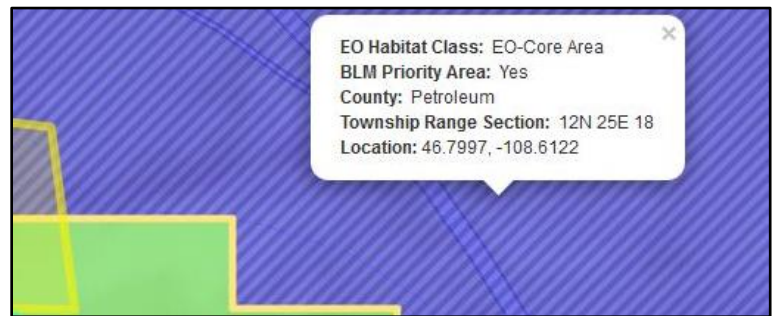
### 4.3.2. Activities Page Map:

The Activities page is intended for you to provide accurate spatial data of your proposed project activities to the Program for review. It is critical that the spatial data correctly depicts the shape, scale, and location for the proposed project activities. Follow the instructions below to add or create your spatial data:

1. Within the Activities page map, navigate to your project's general location by using the 'Search' bar in the upper left corner and the 'Zoom' buttons. You can search by street address, Township and Range (PLSS), town name, etc.

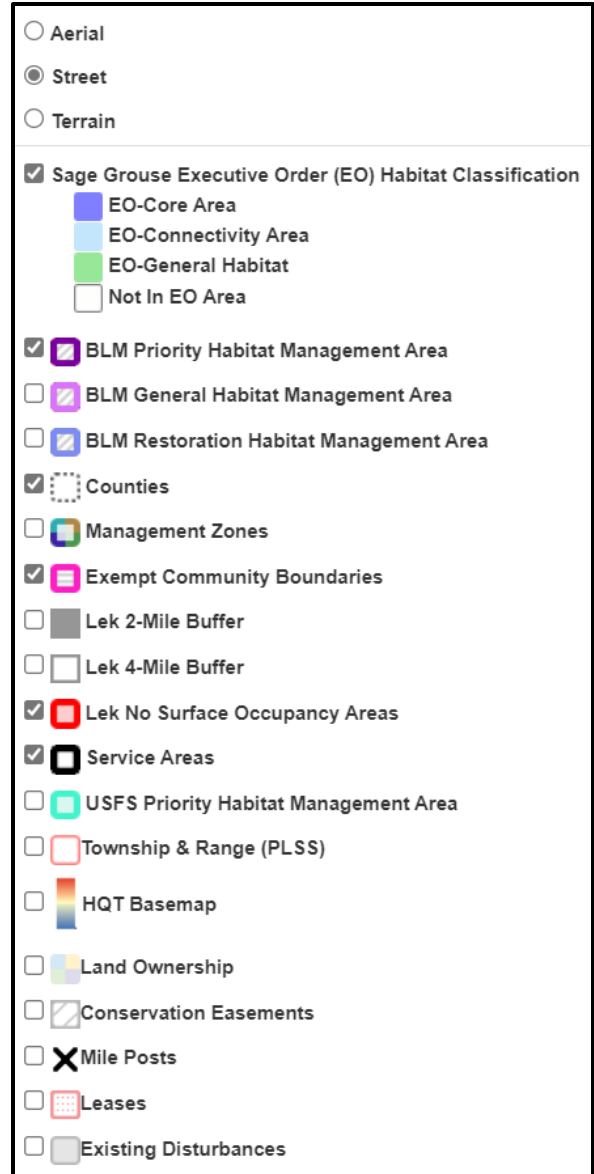


2. **NOTE:** the mouse cursor can be used to display information for a given location on the map by clicking your mouse anywhere on the map. The information displayed in the pop-up window is not for a given feature but is based on the where the cursor is located.



4. Get to know the Activities page map to customize your data entry experience:

- a. There are many data layer options to help you locate your proposed project. Hold your cursor over the **‘Layers’** button (☰) at the top right corner of the map to open the legend and layers window. In this window, you can select layers to display on the map. The first three radio-button selections (Aerial, Street, and Terrain) offer different background basemap options. In some cases, viewing topographical details might be easier if other data layers are switched off.
- b. The Program encourages you to experiment to find the combination of data layers that best suits your map viewing preferences and data entry purposes.
- c. Additional data layers in the menu that can be toggled on and off are shown in the screenshot to the right.



### 4.3.3. Entering Spatial Data:

There are two options for entering spatial data depicting your proposed project activities:

- 1. Upload GIS files (e.g., upload spatial data)
- 2. Draw proposed activities using the **‘Drawing Tools’**

#### 4.3.3.1. Option 1: Uploading Spatial Data

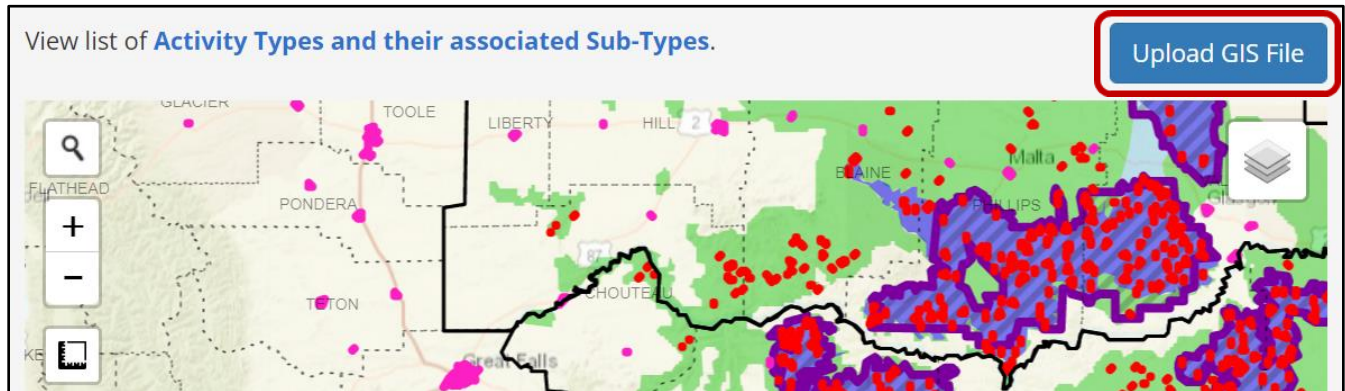
Uploading spatial data allows you to submit your proposed project’s spatial data by uploading shapefiles or geodatabases generated using Geographic Information Systems (GIS) software (e.g., ArcGIS, QGIS). Spatial data files need to be compressed (i.e., zipped) before uploading. After successfully uploading

the compressed file(s), the spatial data will be displayed on the map. Note: accepted GIS file types that can be uploaded in compressed files include Geodatabase, Keyhole Markup Language, or Shapefile.

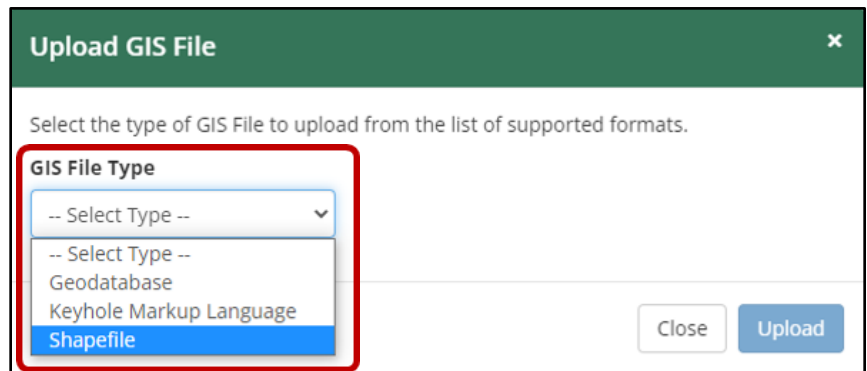
### **Option 1: Uploading Spatial Data Example**

The following example starts with a compressed file of a shapefile created using ArcGIS Pro. A single feature requires several files to display. For this reason, spatial data must be compressed to ensure all necessary associated files are included in the upload for proper display of the uploaded shapefile.

1. Click the blue **'Upload GIS File'** button above the map



2. In the **'Upload GIS File'** pop-up window, select the **'GIS File Type'** from the drop-down list that represents the format of the GIS file you intend to upload.

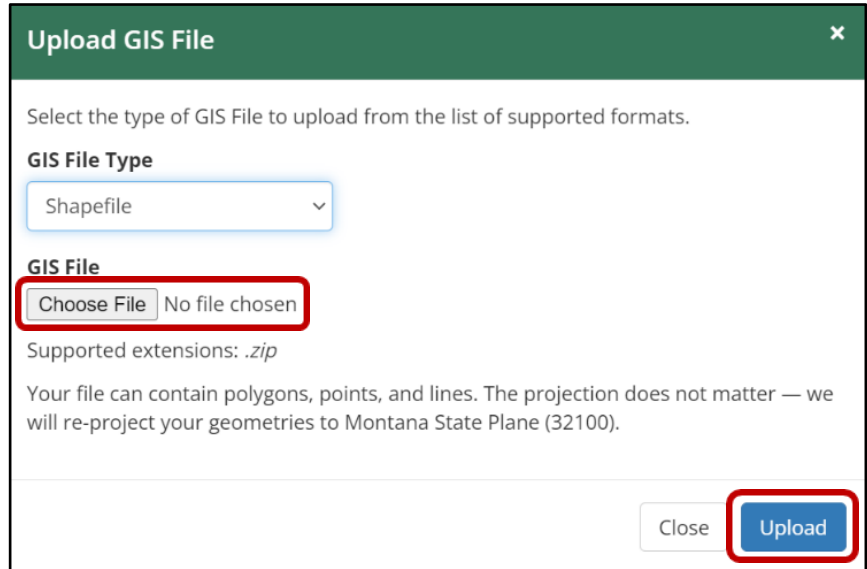




3. Click on **‘Choose File’**

4. Locate where you saved your data to select it for upload.

5. Click the blue **‘Upload’** button in the bottom right of the pop-up window.



6. Your project will display as a blue-hatched polygon on the Activities page map (see example below).

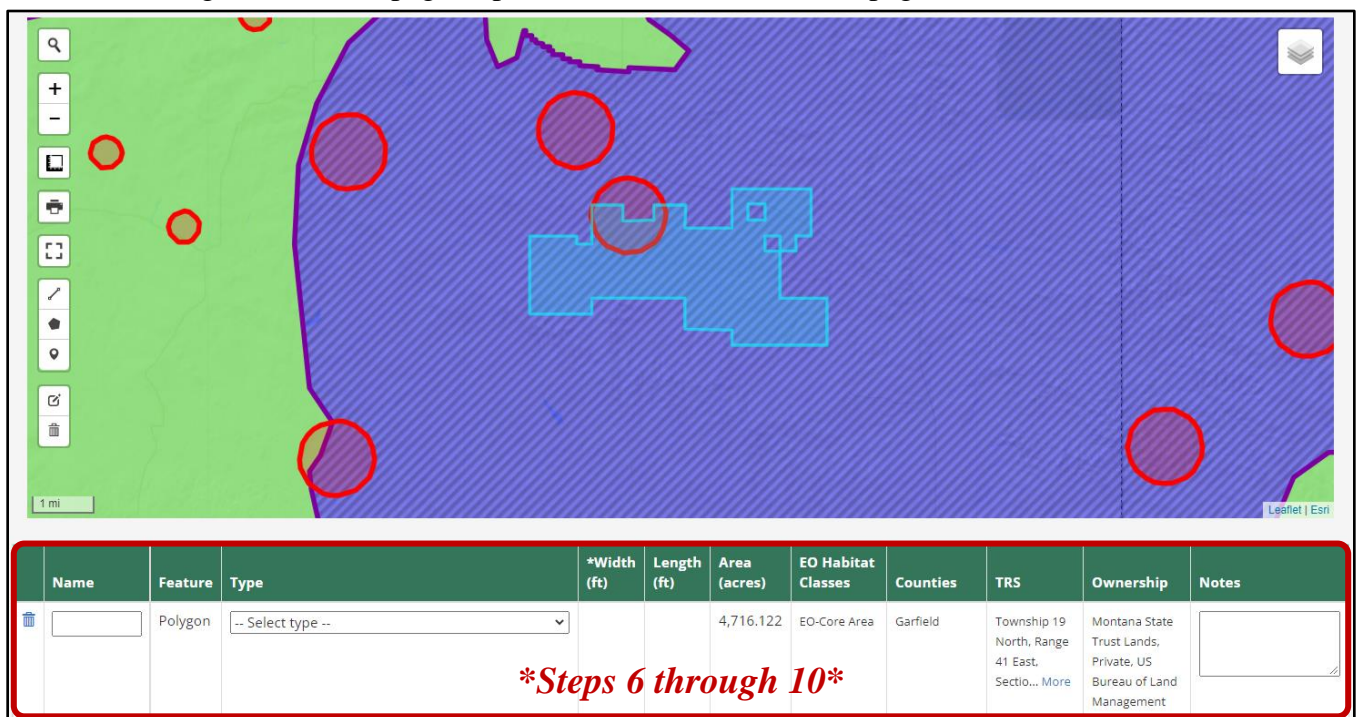
7. In the box under **‘Name’**, provide a name for the polygon feature.

8. Click on the **‘Select type’** drop-down list to select the most appropriate Activity Type for your proposed activity.

9. If applicable, provide any notes in the **‘Notes’** column.

- a. Width (ft) is required only for line features (e.g., pipeline, road). A minimum default of 10 feet is necessary in order for the line feature to be adequately captured during the HQT analysis.

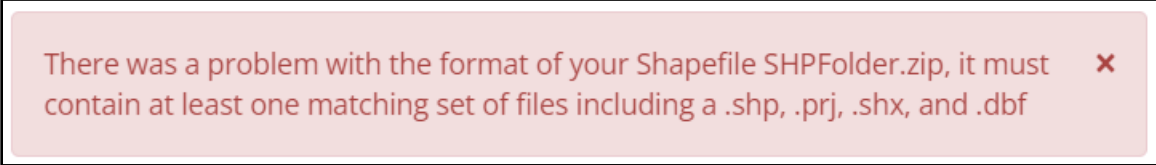
10. Once you have completed the Activities page, click the blue **‘Save & Continue’** button on the lower right side of the page to proceed to the Questionnaire page.



Name	Feature	Type	*Width (ft)	Length (ft)	Area (acres)	EO Habitat Classes	Counties	TRS	Ownership	Notes
	Polygon	-- Select type --			4,716.122	EO-Core Area	Garfield	Township 19 North, Range 41 East, Sectio... More	Montana State Trust Lands, Private, US Bureau of Land Management	

*\*Steps 6 through 10\**

11. NOTE: if you receive an error after attempting to upload the compressed GIS file (see screenshot below), make sure that the compressed folder contains at least the four mentioned file types: **‘.shp’, ‘.prj’, ‘.shx’, and ‘.dbf’**. Make sure to compress just the GIS files and *not* the file folder that contains them.



#### 4.3.3.2. *Option 2: Drawing your Activities*

This option allows you to use the Activities page map to create your project’s spatial data directly within the map. The Activities page map contains drawing tools located on the left side of the map. The drawing tools are designed to provide opportunities to draw the features of proposed activities using lines (↗), polygons (⬠), and points (📍). The full suite of map tools includes a **‘Search’** bar, **‘Zoom’** buttons (+, -), **‘Measurement’** tool (📏), **‘Print’** tool (🖨), **‘View Fullscreen’** map option (🗉), **‘Edit activity geometries’** tool (✎), and **‘Remove activity geometries’** tool (🗑).

**NOTE:** While it is possible to draw the boundaries of your proposed project using the **‘Draw an activity as a polygon’** tool (⬠) within the Activities page map, it may be difficult to accurately depict the boundaries. Therefore, using Desktop GIS software (e.g., ArcGIS, QGIS) is recommended to create accurate GIS data to upload.

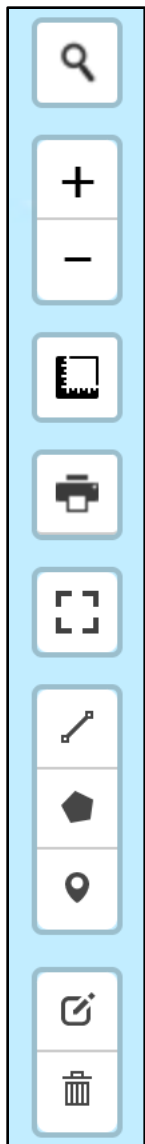
If you choose to draw the boundaries of your proposed project within the Activities page map using the **‘Draw an activity as a polygon’** tool, refer to the **‘Activities Page Map Tools’** section below.

Please consult the Program at [sagegrouse@mt.gov](mailto:sagegrouse@mt.gov) for assistance.

#### 4.3.3.3. *Activities Page Map Tools*

The Activities page map tools are found on the left side of the map (see diagram below). They are designed to allow you the opportunity to draw the geometries of your proposed project activities using lines, polygons, and points. In doing so, applicants unable to upload a GIS file illustrating their proposed project can use the Activities page map tools instead to include the required spatial data for their proposed project review with the Program. Each tool and its description are described in further detail below for ease of use.





⇐ **Search Tool:** type a location, click enter to navigate map to specified location

⇐ **Zoom Tool:** click the ‘+’ or ‘-’ buttons to zoom map in or out

⇐ **Measurement Tool:** measure distances from point to point

⇐ **Print Tool:** print the map view

⇐ **View Fullscreen Tool:** expand the map view from embedded within the Activities page to a fullscreen view

⇐ **Drawing Tools:** draw geometries representing activities associated with a proposed project.

- The **Line Tool** for roads, pipelines, fences, etc.
- Use the **Polygon Tool** for buildings, crops, yards, area, etc.
- Use the **Point Tool** for perching, nesting deterrents.

⇐ **Edit Geometries Tool** or **Remove Geometries Tool:** edit or remove, respectively, any of the drawn geometries

#### 4.4. STEP #4: Questionnaire

The content presented in the Questionnaire page is determined based on the specific Activity Type(s) you selected in the previous step ([Section 4.3. Step #3: Activities](#)). The questions are intended to help provide information relevant to the Program’s review. Answer each question listed. See an example of the Questionnaire page for a buried power line in the screenshot below.

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.

Activity: Buried Power Line

Type	Feature	Area	EO Habitat Classes	Counties	TRS	Ownership	Notes
Bury or Remove Powerline - Bury or Remove Powerline	Line	1.929 acres	EO-Core Area	Garfield	Township 19 North, Range 41 East, Sections 9, 10	Private	

**Questions:**

**Implementation dates:**  
*How long will the implementation of the activity take? Enter the date the implementation begins and the date implementation ends.*

Start:

End:

**Maintenance dates:**  
*How long will the project be on the landscape or how long will the activity occur? Enter the date the activities begin and the date regular operations or activities will stop.*

Start:

End:

**Is the power line being removed or buried?**

**Why is the power line being buried or removed?**

**What is the voltage size (kV)?**

**Will you need bore holes?**  Yes  No

**Are you removing existing poles?**  Yes  No

**Will you be working within an existing right-of-way?**  Yes  No

**Will you undertake reseeding and/or weed control?**

**How many years will the site be monitored post treatment?**

#### 4.5. STEP #5: Attachments

The Attachments page allows you to include files pertinent to your proposed project that include information not previously provided that may be useful for the Program’s review.

Follow the steps below to attach files and refer to the screenshot below for additional context:

1. Click the **‘Choose Files’** button to navigate to and select the attachment you wish to provide
2. Select the file **‘Type’** of the attachment from the drop-down list
3. Provide a **‘Title’** for the attachment and a **‘Description’** of the attachment
4. To upload additional attachments, click **‘Save’** and the attachment will then appear under the Existing Attachments section of the Attachments page
5. To upload the selected attachment and continue to the Review & Submit page, click **‘Save & Continue’**

### Attachments

Please upload documents pertinent to your proposed project, including Stewardship Plan, EAs, or other documentation identifying original boundaries. Multiple attachments can be uploaded at a time. Edit

---

#### New Attachments

**Attachment**  HQT Quick ...ments.docx

Use CTRL + Click (PC) or Command + Click (Mac) to select multiple files at once. You must select a type. Click Save at the bottom of the page to upload all files.

**Type**  Additional attachment types have been added.

**Title**

**Description**

---

#### Existing Attachments

There are currently no attachments uploaded for this project.

#### 4.6. STEP #6: Review & Submit

After you completed entering the information for your proposed project (Steps #1-5), review the information you have provided on the Review & Submit page. Please carefully review your project’s information to ensure you have 1) an accurate spatial representation of your project’s proposed activity or activities, 2) a thorough description of the proposed project, and 3) identified all aspects of the proposed project. 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 proposed project will proceed into a review by the Program. The Program will examine the information provided and run a preliminary HQT to determine the potential number of credits that could be created from the proposed project.

If you decide to modify your proposed project, you can access your proposed project from the same account you used to create the proposed project. However, after the proposed project has been submitted to the Program for review, the proposed project must be ‘returned’ to you by the Program prior to any editing you wish to make. Collaboration between the project developer and the Program will allow submitted projects to be modified. Feel free to contact the Program directly with any questions.

## **5. CONSERVATION PROJECT'S PRIMARY PURPOSE IS NOT SAGE-GROUSE MITIGATION**

Projects not being submitted for Stewardship Account Grants nor as Permittee-Responsible Mitigation projects may still require consultation with the Program if a state or federal permit is required for the project. These projects must be entered through the Program's website.

Project proponents may or may not be interested in generating credits due to eligibility requirements. If you have questions about credit eligibility, please contact the Program.

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 uploaded attachments, will be saved for you.

The Program requests the following information to accurately review your submitted project.

### **5.1. STEP #1: Instructions**

The Instructions page will help guide you (i.e., the project proponent) through the submission process. There are links to many helpful guides including the [FAQ](#) and [Information About the Montana Mitigation HQT Basemap](#) (see screenshot below).

You can return to this page for guidance at any time by clicking on the **'1. Instruction'** button on the left side of the page. Once you have reviewed the Instructions page, click the blue **'Continue'** button on the lower right side of the page to proceed to the Basics page.

**1. Instructions**

2. Basics

3. Activities

4. Questionnaire

5. Attachments

6. Review & Submit

## Instructions

The project proposal submission process has a few parts:

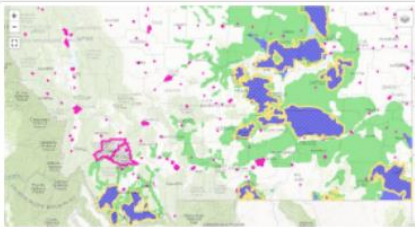
**Basic Information About Your Project**  
Describe your project involving permitted activities proposed in sage grouse habitats designated as core (blue), general (green), or connectivity (light-blue) habitats. If you're not sure which habitat zone your project is in, click the map to the right before entering Basic Information. For program details please see our [FAQ](#).

**Activities**  
TBD

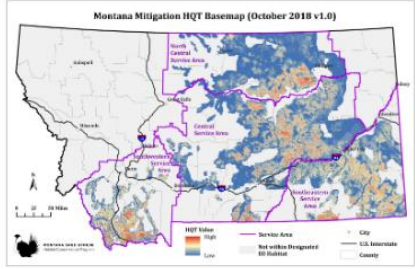
**Questionnaire: Project and Activity Description Details**  
Once your proposed activities are mapped and described, you will need to answer some questions based on your activity types.

**Save Your Project for Later, Save and Continue, or Submit for Review**  
You'll have a chance to review a summary of your proposed project before you submit it for consultation. You do not need to complete your submission in one session – your work will be saved and the next time you log in, you'll be able to resume where you left off.

**Help**  
[Information About the Montana Mitigation HQT Basemap](#)  
If you run into any snags or have questions, please contact us.



Make sure your project is in sage grouse habitat



Mitigation HQT Basemap (October 2018 v1.0)

Continue

## 5.2. STEP #2: Basics

The Basics page begins the process of describing and documenting your proposed project. It is important to be as thorough as possible in your answers to avoid the need for submitting additional information at a later date, which will slow down the review process.

On this page you will be able to provide: a name for your proposed project, a thorough description of your proposed project, contact information, credit owner contact information, and the purpose for conducting your proposed project. Please review the following sections for more information about each piece of information requested on the Basics page.

### 5.2.1. Project Information:

On the Basics page, you will need to create a **‘Project Name’** and provide a description of the proposed project (see screenshot below).

The Program encourages you to be as descriptive as possible when detailing your proposed project. The Program needs to understand what habitat benefits are proposed and the duration of those benefits on the landscape. More information is always better than less information. If the Program is not provided with sufficient information, the proposed project will be returned to you and the Program will ask you to provide the missing information.

For a streamlined review process, the Program recommends you include the following items in the project description:

- Describe the purpose of the project and its proposed activities,
- If the project includes a restoration or enhancement component, describe the methods (and machinery, if applicable) that will be used during implementation and/or monitoring phases,
- Describe the current landscape and the expected post-project implementation landscape,
- Describe the expected time frame for the implementation and/or monitoring phases, and
- Provide information about the necessary permits for your project implementation.

**Project Information**

Project Name:

Description:

*Describe your complete project, not just portions of the project on federal or state land.*

### 5.2.2. Project Contact Information:

The contact information entered in this section should be of the person whom the Program corresponds with throughout the review process. The website should auto-fill the contact information for you using the information you provided for your login access (either through ePass or Okta). If needed, please update your project contact information, including email, phone, mailing address, and if applicable, additional contact information (see screenshot below).

**Project Contact Information**

Name: <Your Name>

Email:  Phone:

Mailing Address:  Street Address  City  -- State --

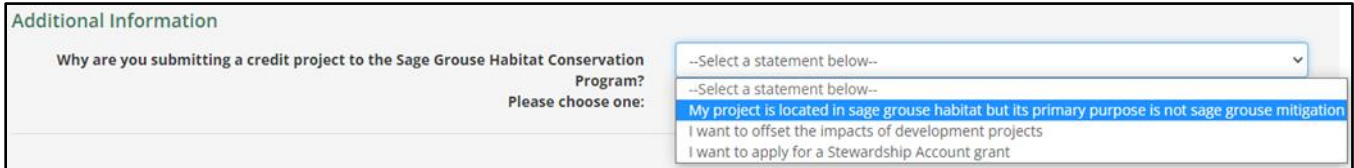
Zip

Additional Contact Info:

*Describe and provide phone/email for people other than yourself that we might need to coordinate with while reviewing your project*

### 5.2.3. Additional Information:

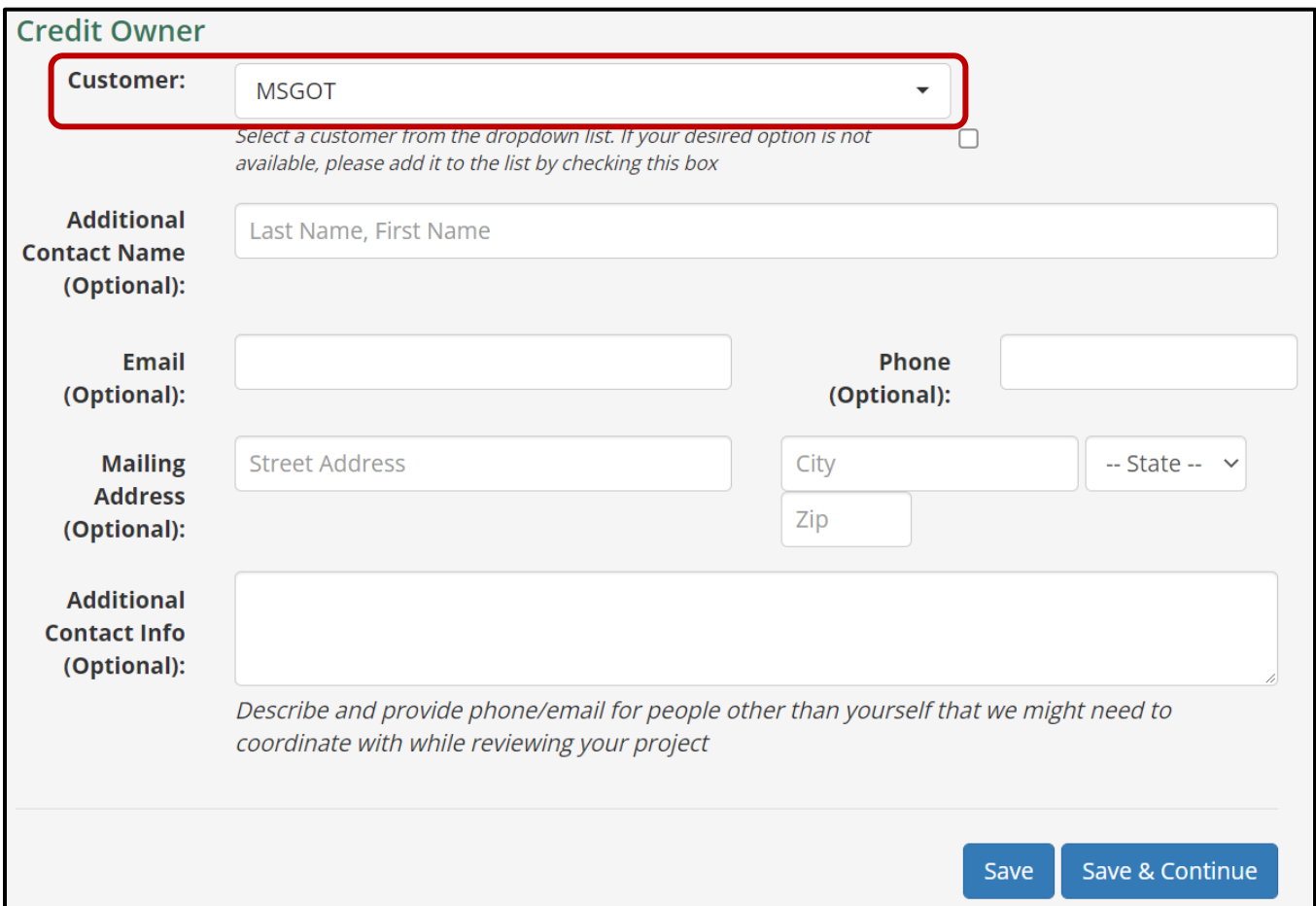
In the Additional Information section, please identify the primary reason for submitting your proposed project to the Program for review. Because this is a project NOT intended for a Stewardship Account Grant nor is it intended to offset debits accrued by development projects, select **‘My project is located in sage grouse habitat, but its primary purpose is not sage grouse mitigation’** from the drop-down list (see screenshot below).



### 5.2.4. Credit Owner:

The Credit Owner for these types of conservation projects is MSGOT. Please scroll through the drop-down list for **‘Customer’** to find and select **‘MSGOT’**.

Once you have completed the Basics page, click the blue **‘Save & Continue’** button on the lower right side of the page to proceed to the Activities page or click **‘Save’** if you need to exit your application.





## 5.1. STEP #3: Activities

### 5.1.1. Activity Types:

Selecting the appropriate activity type for your proposed project is very important. The website will tailor the questions presented later in the Questionnaire page based on the specific activity type selected on this page. If you select the wrong activity type, you will be prompted to answer potentially non-relevant questions about your project and you may miss out on questions required for an accurate review of your project. This may result in a prolonged review process. This may also require you to re-enter all your information due to the information being specifically related to a given activity type.

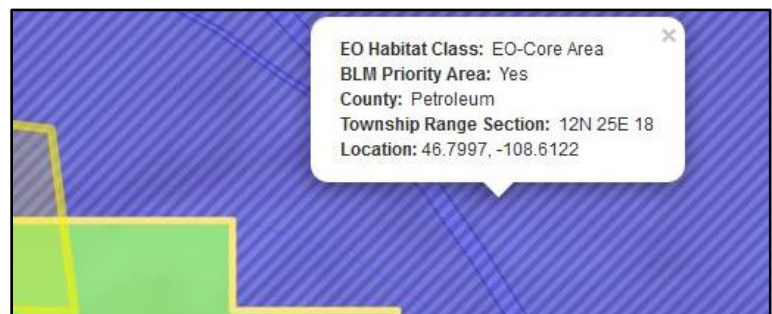
**Table 3** provides additional information useful for determining your activity type(s). Each activity type allows for a specific feature type (i.e., point, line, polygon) to spatially represent the proposed activity. For example, burying a powerline is only applicable with a line feature. However, removing conifers can only be depicted using a polygon feature.

If you are unsure which activity type to select for a given proposed activity, contact the Program to discuss which type(s) best represents the activities associated with your proposed project.

### 5.1.2. Activities Page Map:

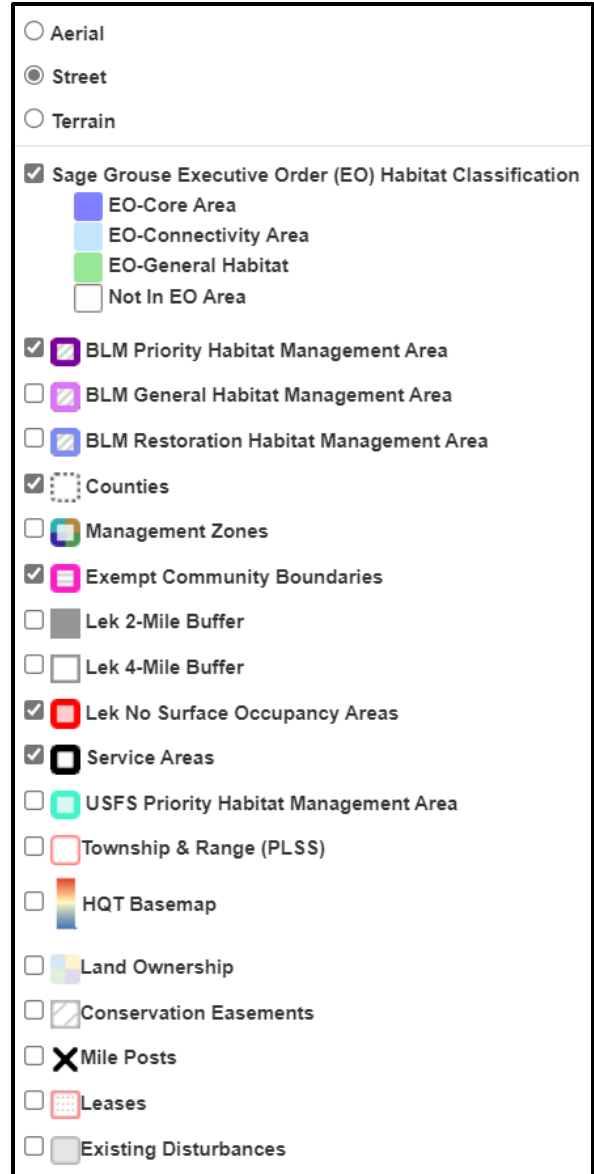
The Activities page is intended for you to provide accurate spatial data of your proposed project activities to the Program for review. It is critical that the spatial data correctly depicts the shape, scale, and location for the proposed project activities. Follow the instructions below to add or create your spatial data:

1. Within the Activities page map, navigate to your project's general location by using the 'Search' bar in the upper left corner and the 'Zoom' buttons. You can search by street address, Township and Range (PLSS), town name, etc.
2. **NOTE:** the mouse cursor can be used to display information for a given location on the map by clicking your mouse anywhere on the map. The information displayed in the pop-up window is not for a given feature but is based on the where the cursor is located.



5. Get to know the Activities page map to customize your data entry experience:

- a. There are many data layer options to help you locate your proposed project. Hold your cursor over the **‘Layers’** button (☰) at the top right corner of the map to open the legend and layers window. In this window, you can select layers to display on the map. The first three radio-button selections (Aerial, Street, and Terrain) offer different background basemap options. In some cases, viewing topographical details might be easier if other data layers are switched off.
- b. The Program encourages you to experiment to find the combination of data layers that best suits your map viewing preferences and data entry purposes.
- c. Additional data layers in the menu that can be toggled on and off are shown in the screenshot to the right.



### 5.1.3. Entering Spatial Data:

There are two options for entering spatial data depicting your proposed project activities:

1. Upload GIS files (e.g., upload spatial data)
2. Draw proposed activities using the **‘Drawing Tools’**

#### 5.1.3.1. Option 1: Uploading Spatial Data

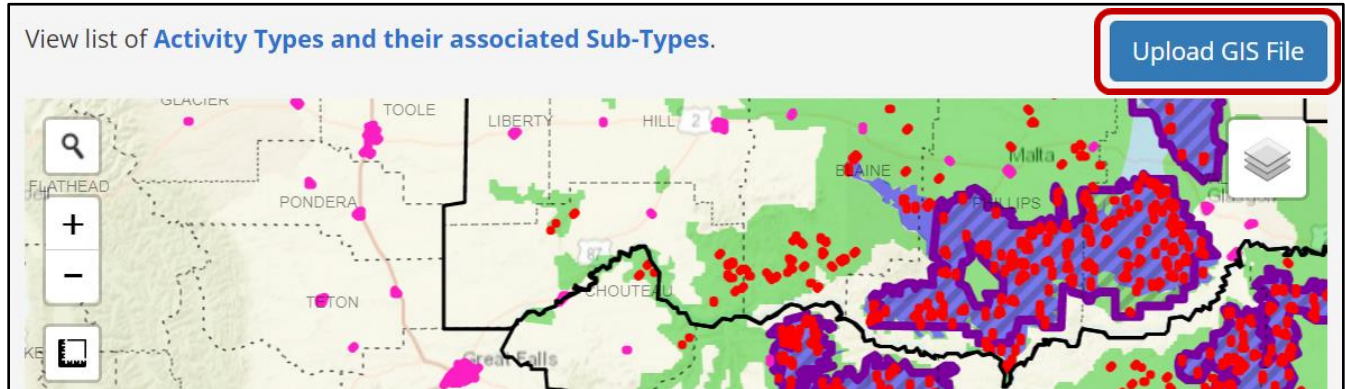
Uploading spatial data allows you to submit your proposed project’s spatial data by uploading shapefiles or geodatabases generated using Geographic Information Systems (GIS) software (e.g., ArcGIS, QGIS). Spatial data files need to be compressed (i.e., zipped) before uploading. After successfully uploading

the compressed file(s), the spatial data will be displayed on the map. Note: accepted GIS file types that can be uploaded in compressed files include Geodatabase, Keyhole Markup Language, or Shapefile.

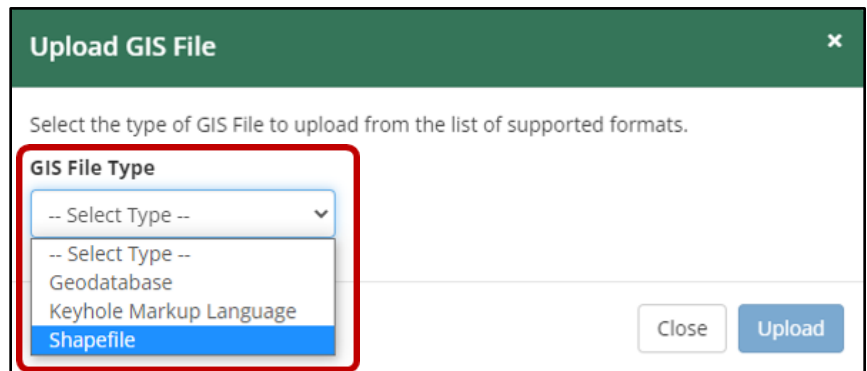
### **Option 1: Uploading Spatial Data Example**

The following example starts with a compressed file of a shapefile created using ArcGIS Pro. A single feature requires several files to display. For this reason, spatial data must be compressed to ensure all necessary associated files are included in the upload for proper display of the uploaded shapefile.

1. Click the blue **'Upload GIS File'** button above the map



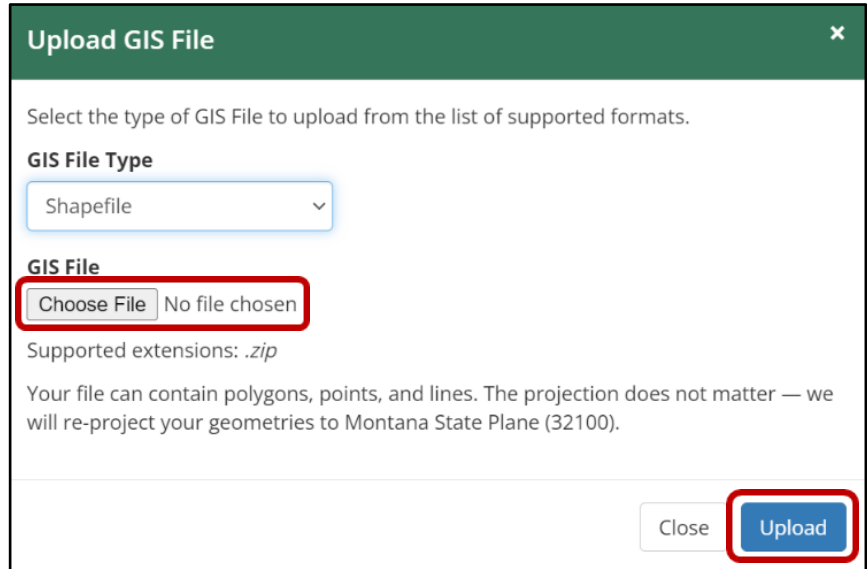
2. In the **'Upload GIS File'** pop-up window, select the **'GIS File Type'** from the drop-down list that represents the format of the GIS file you intend to upload.



3. Click on **‘Choose File’**

4. Locate where you saved your data to select it for upload.

5. Click the blue **‘Upload’** button in the bottom right of the pop-up window.



6. Your project will display as a blue-hatched polygon on the Activities page map (see example below).

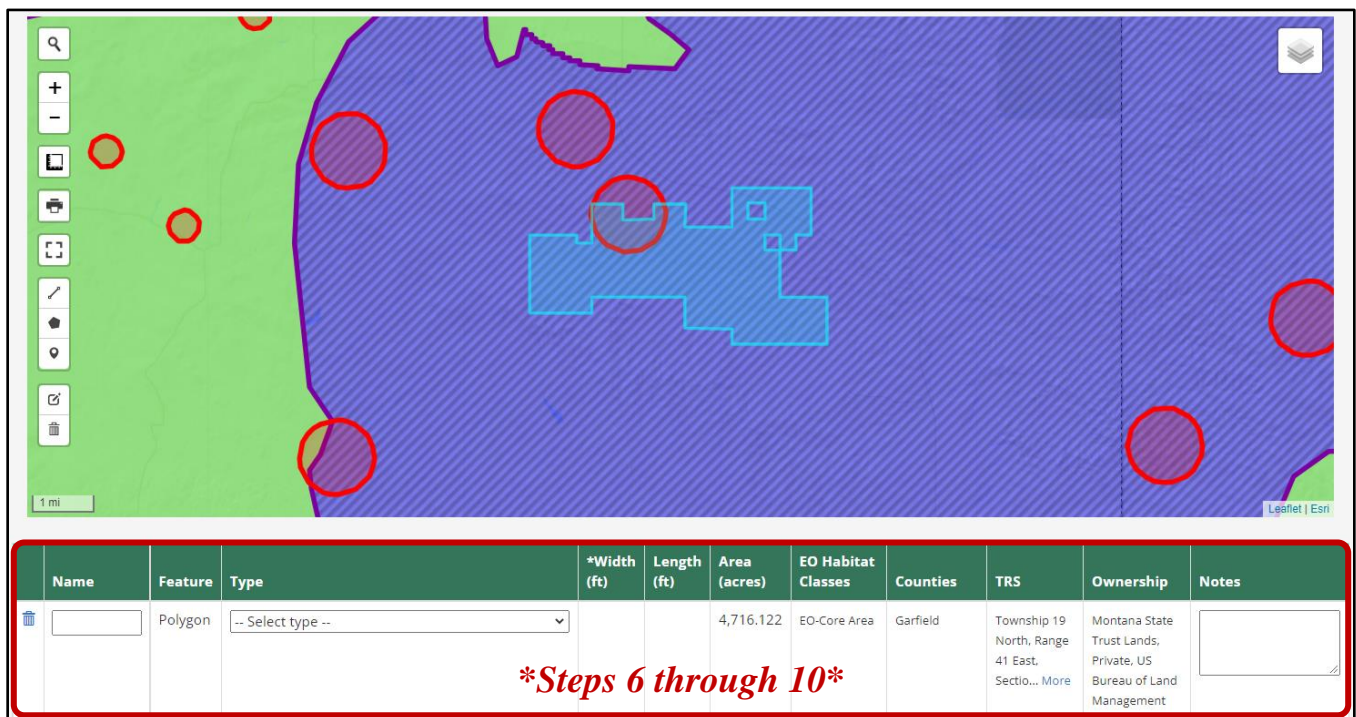
7. In the box under **‘Name’**, provide a name for the polygon feature.

8. Click on the **‘Select type’** drop-down list to select the most appropriate Activity Type for your proposed activity.

9. If applicable, provide any notes in the **‘Notes’** column.

- a. Width (ft) is required only for line features (e.g., pipeline, road). A minimum default of 10 feet is necessary in order for the line feature to be adequately captured during the HQT analysis.

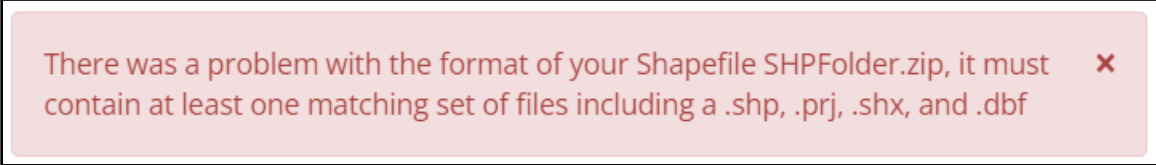
10. Once you have completed the Activities page, click the blue **‘Save & Continue’** button on the lower right side of the page to proceed to the Questionnaire page.



Name	Feature	Type	*Width (ft)	Length (ft)	Area (acres)	EO Habitat Classes	Counties	TRS	Ownership	Notes
	Polygon	-- Select type --			4,716.122	EO-Core Area	Garfield	Township 19 North, Range 41 East, Sectio... More	Montana State Trust Lands, Private, US Bureau of Land Management	

*\*Steps 6 through 10\**

11. NOTE: if you receive an error after attempting to upload the compressed GIS file (see screenshot below), make sure that the compressed folder contains at least the four mentioned file types: **‘.shp’, ‘.prj’, ‘.shx’, and ‘.dbf’**. Make sure to compress just the GIS files and *not* the file folder that contains them.



#### 5.1.3.1. Option 2: Drawing your Activities

This option allows you to use the Activities page map to create your project’s spatial data directly within the map. The Activities page map contains drawing tools located on the left side of the map. The drawing tools are designed to provide opportunities to draw the features of proposed activities using lines (↖), polygons (◆), and points (●). The full suite of map tools includes a **‘Search’** bar, **‘Zoom’** buttons (+, -), **‘Measurement’** tool (L), **‘Print’** tool (P), **‘View Fullscreen’** map option (F), **‘Edit activity geometries’** tool (E), and **‘Remove activity geometries’** tool (X).

**NOTE:** While it is possible to draw the boundaries of your proposed project using the **‘Draw an activity as a polygon’** tool (◆) within the Activities page map, it may be difficult to accurately depict the boundaries. Therefore, using Desktop GIS software (e.g., ArcGIS, QGIS) is recommended to create accurate GIS data to upload.

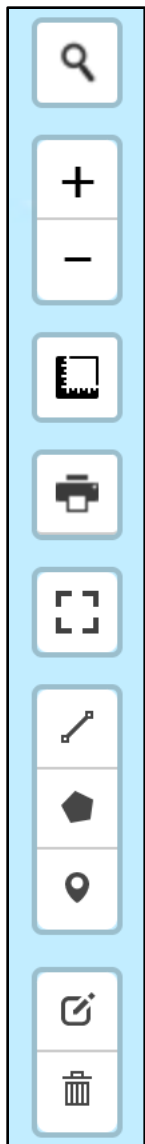
If you choose to draw the boundaries of your proposed project within the Activities page map using the **‘Draw an activity as a polygon’** tool, refer to the **‘Activities Page Map Tools’** section below.

Please consult the Program at [sagegrouse@mt.gov](mailto:sagegrouse@mt.gov) for assistance.

#### 5.1.3.2. Activities Page Map Tools

The Activities page map tools are found on the left side of the map (see diagram below). They are designed to allow you the opportunity to draw the geometries of your proposed project activities using lines, polygons, and points. In doing so, project proponents unable to upload a GIS file illustrating their proposed project can use the Activities page map tools instead to include the required spatial data for their proposed project. Each tool and its description are described in further detail below for ease of use.





⇐ **Search Tool:** type a location, click enter to navigate map to specified location

⇐ **Zoom Tool:** click the ‘+’ or ‘-’ buttons to zoom map in or out

⇐ **Measurement Tool:** measure distances from point to point

⇐ **Print Tool:** print the map view

⇐ **View Fullscreen Tool:** expand the map view from embedded within the Activities page to a fullscreen view

⇐ **Drawing Tools:** draw geometries representing activities associated with a proposed project.

- The **Line Tool** for roads, pipelines, fences, etc.
- Use the **Polygon Tool** for buildings, crops, yards, area, etc.
- Use the **Point Tool** for perching, nesting deterrents.

⇐ **Edit Geometries Tool** or **Remove Geometries Tool:** edit or remove, respectively, any of the drawn geometries

### 5.1. STEP #4: Questionnaire

The content presented in the Questionnaire page is determined based on the specific Activity Type(s) you selected in the previous step ([Section 5.1. Step #3: Activities](#)). The questions are intended to help provide information relevant to the Program’s review. Answer each question listed. See an example of the Questionnaire page for a permanent plug and abandoned oil or gas well in the screenshot below.

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.

Activity: Plug & Abandon Well

Type	Feature	Area	EO Habitat Classes	Counties	TRS	Ownership	Notes
Permanent Plug and Abandon of Oil or Gas Well - Permanent Plug and Abandon of Oil or Gas Well	Polygon	1,516 acres	EO-Core Area	Garfield	Township 19 North, Range 41 East, Section 10	Private	

Questions:

**Implementation dates:**  
*How long will the implementation of the activity take? Enter the date the implementation begins and the date implementation ends.*

Start:

End:

**Maintenance dates:**  
*How long will the project be on the landscape or how long will the activity occur? Enter the date the activities begin and the date regular operations or activities will stop.*

Start:

End:

**What type of well are you plugging and abandoning?**

**Will all infrastructure be removed?**  
 Yes  No

**Will you undertake reseeding and/or weed control?**

**How many years will the site be monitored post treatment?**

## 5.2. STEP #5: Attachments

The Attachments page allows you to include files pertinent to your proposed project that include information not previously provided that may be useful for the Program’s review.

Follow the steps below to attach files and refer to the screenshot below for additional context:

1. Click the **‘Choose Files’** button to navigate to and select the attachment you wish to provide
2. Select the file **‘Type’** of the attachment from the drop-down list
3. Provide a **‘Title’** for the attachment and a **‘Description’** of the attachment
4. To upload additional attachments, click **‘Save’** and the attachment will then appear under the Existing Attachments section of the Attachments page
5. To upload the selected attachment and continue to the Review & Submit page, click **‘Save & Continue’**



### Attachments

Please upload documents pertinent to your proposed project, including Stewardship Plan, EAs, or other documentation identifying original boundaries. Multiple attachments can be uploaded at a time. Edit

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#### New Attachments

**Attachment** Choose Files HQT Quick ...ments.docx

Use CTRL + Click (PC) or Command + Click (Mac) to select multiple files at once. You must select a type. Click Save at the bottom of the page to upload all files.

**Type** -- Not Assigned -- v

Additional attachment types have been added.

**Title**

**Description**

---

#### Existing Attachments

There are currently no attachments uploaded for this project.

Save
Save & Continue

### 5.3. STEP #6: Review & Submit

After you completed entering the information for your proposed project (Steps #1-5 above), review the information you have provided on the Review & Submit page. Please carefully review your project’s information to ensure you have 1) an accurate spatial representation of your project’s proposed activity or activities, 2) a thorough description of the proposed project, and 3) identified all aspects of the proposed project. 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 proposed project will proceed into a review by the Program. The Program will examine the information provided and consult with you throughout the process.

If you decide to modify your proposed project, you can access your proposed project from the same account you used to create the proposed project. However, after the proposed project has been submitted to the Program for review, the proposed project must be ‘returned’ to you by the Program prior to any editing you wish to make. Collaboration between the project developer and the Program will allow submitted projects to be modified. Feel free to contact the Program directly with any questions.

## 6. GLOSSARY

**Additionality:** Conservation benefits of a conservation action or measure that improve upon the baseline condition of the impacted species or its habitat in a manner that is demonstrably new and would not have occurred without the pre-listing conservation action.

**Baseline:** The pre-existing condition of a resource, at all relevant scales, as quantified by application of the HQT. For preservation credit sites, baseline is set as 60% of the total functional acres protected by the easement or lease, so that 40% of the functional acres becomes available as credits.

**Compensatory Mitigation:** Actions that provide compensation for unavoidable adverse residual impacts to species or their habitat and when taken in advance of the impact through activities that preserve, enhance, restore, and/or establish sage-grouse habitat through the Montana Mitigation System.

**Connectivity Area, State of Montana:** An area that provides an important linkage among populations of sage-grouse, particularly between Core Areas or priority populations in adjacent state and across international borders.

**Conservation Actions:** Actions that preserve, enhance, restore, establish, and/or avoid the likely future loss of sage-grouse habitat functionality by reducing or eliminating threats to that habitat.

**Conservation Project:** Project which removes or limits threats to sage-grouse habitat quantity and/or quality through preservation, restoration, or enhancement actions.

**Core Area, State of Montana:** An area that has the highest conservation value for sage-grouse and has the greatest number of displaying male sage-grouse and associated sage-grouse habitat, as presently delineated by Executive Order 21-2015.

**Credit:** A defined unit of trade representing the accrual or attainment of resource functions or values at a proposed project site.

**Credit Project:** Conservation actions, including enhancement, restoration, creation, or preservation taken by an entity on a mitigation credit project site.

**Debit:** A defined unit of trade representing the loss of resource functions or value at an impact or project site. The unit of measure is the same as that for a credit within a specific mitigation system.

**Debit Project:** A development action proposed in designated sage-grouse habitat that requires state or federal agency review, approval, or authorization and is required to avoid, minimize, reclaim, and/or compensate for impacts to sage-grouse habitat.

**Development Project:** project which includes the conversion of formerly suitable habitat to grasslands, croplands, mining, well pads, roads, or other physical disturbance that renders the habitat unusable for sage-grouse.

**Durability:** The maintenance of the effectiveness of a mitigation measure and/or a compensatory mitigation site for the duration of the impacts from the associated development or land use, including resource, administrative, and financial considerations.

**Endangered Species Act:** The Endangered Species Act (ESA) prohibits the import, export, or taking of fish, wildlife, and plants that are listed as threatened or endangered species. The ESA provides for adding species to and removing them from the list of threatened and endangered species, and for preparing and implementing plans for their recovery. It provides for interagency cooperation to avoid take of listed species and for issuing permits for otherwise prohibited activities. The ESA also provides for cooperation with States, including authorization of financial assistance. Lastly, the ESA implements the provisions of the Convention on International Trade in Endangered Species of Wild Flora and Fauna (CITES; 16 U.S.C. 1531-1544).

**Enhancement:** An increase or improvement in quality, value, or extent (of a resource) that has been degraded or could be managed to increase the value of that habitat over its current value.

**Establishment:** Introduction or re-introduction of a resource at a site.

**Financial Assurance:** A financial instrument, including but not limited to an endowment, bond, contingency fund, insurance policy, or other type of suitable guarantee, that helps ensure that mitigation projects are completed according to plan, that resources are available to correct or replace unsuccessful projects, and that long-term Stewardship Account funds are available for the life of the project.

**Functional Acre:** The single unit of value that expresses the assessment of quantity (acreage) and quality (function) of habitat or projected habitat through the quantification of a set of local and landscape conditions. A functional acre is the metric for outputs from the HQT and forms the basis for quantifying, expressing, and exchanging credits and debits. One functional acre is equivalent to one credit or debit in the mitigation marketplace, respectively.

**General Habitat, State of Montana:** An area providing habitat for sage-grouse but not identified as a Core Area or Connectivity Area.

**Geographic Information System (GIS):** a computer mapping system designed to capture, store, manipulate, analyze, manage, and present all types of geographical data.

**Habitat Function:** The degree of effectiveness of a sage-grouse habitat component to provide services for sage-grouse use and survival. The HQT measure increase or decrease in habitat function to quantify management or debit project impacts to habitat.

**Habitat Quantification Tool (HQT):** The scientific method used to evaluate vegetation and environmental conditions related to the quality and quantity of sage-grouse habitat and to quantify and calculate the value of credits and debits.

**Legal Protection:** The enforceable agreements to protect conservation benefits provided at a mitigation project site, which may include easements, deed restrictions, or other enforceable and durable contractual agreements, typically entered into by a property owner and/or third-party holder and filed with the applicable county.

**Mesic Habitat:** Sage-grouse habitat containing a moderate amount of moisture with unique plant and insect species not found in upland habitat (high or hilly habitat drier than mesic areas).

**Minimization:** Minimizing impacts by limiting the degree or magnitude of the action and its implementation.

**Monitoring:** The process of observing and recording environmental conditions and changes in environmental conditions over space and time.

**Montana Mitigation System:** The framework of the Montana Mitigation System Policy Guidance Document for Greater Sage-Grouse and Montana Mitigation System Habitat Quantification Tool Technical Manual for Greater Sage-Grouse processes.

**Montana Mitigation System Habitat Quantification Tool Technical Manual for Greater Sage-Grouse (HQT Technical Manual):** defines the processes and information necessary to quantify losses of sage-grouse habitat caused by development, and alternatively, to quantify habitat gains resulting from activities which restore, enhance, or preserve sage-grouse habitat.

**Montana Mitigation System Policy Guidance Document for Greater Sage-Grouse (Policy Guidance Document):** defines the processes and information necessary to create, buy, or sell mitigation credits suitable for meeting sage-grouse mitigation requirements within the State of Montana.

**Net Present Value:** The difference between the present values of cash inflows and outflows over a period of time. It aims to determine the present value of future payments.

**Offset:** The act of fully compensating for environmental impacts; accomplished through observance of the mitigation hierarchy, including compensatory mitigation.

**Permittee-Responsible Mitigation:** A compensatory mitigation site that provides ecological functions and services established as part of the conservation actions associated with a Project Developer's action. The Project Developer retains responsibility for ensuring that the required conservation actions are completed and successful. Each Permittee-Responsible Mitigation site is linked to the specific activity that required the offset. Permittee-Responsible Mitigation approved for a specific action is not transferable and cannot be used for other mitigation needs.

**Permitting Agencies:** Agencies that fund or issue permits for projects that may impact sage-grouse habitat, including the Montana state agencies, Montana State Trust Lands, U.S. Forest Service, and the Bureau of Land Management.

**Preservation:** The removal of a threat to, or preventing the decline of, resources. Preservation may include the application of new protective designations on previously unprotected land or the relinquishment or restraint of a lawful use that adversely impacts resources.

**Project Developer:** An entity proposing an action that will result in a debit.

**Raw HQT Score:** Final project score produced from the HQT that reflects the total Functional Acres gained for a credit project.

**Reclamation:** Rectifying the impact by repairing, rehabilitating, or restoring the affected environment.

**Restoration:** The process of assisting the recovery of a resource (including its values, services, and/or functions) that has been degraded, damaged, or destroyed to the condition that would have existed if the resource had not been degraded, damaged, or destroyed.

**Site Management Plan (Site Plan):** A document provided prior to signing of the mitigation instrument or agreement which identifies the extent, type, and description of all proposed conservation actions associated with a credit project.

**Stewardship Plan:** Identifies a long-term person or entity (i.e., steward) of a credit project, stewardship goals and activities, the amount and source of funds needed for an endowment to maintain the site for the duration of the project life, and documentation of the time needed to implement the full stewardship plan.

## APPENDIX A. CONSERVATION ACTIVITY TYPES

**Table 3.** Conservation project types, associated activity types and sub-types with their accepted feature type for spatial representation of conservation activities.

Project Type	Activity Type	Associated Sub-Types	Feature Type
Preservation	Easement	Building Envelope	Polygon
		Perpetual	Polygon
		Term	Polygon
	Lease	Building Envelope	Polygon
		Lease	Polygon
Restoration or Enhancement	Aquatic Habitat Restoration		Polygon
	Conifer Removal	Access Road	Line
		Conifer Removal	Polygon
	Bury or Remove Communication Line		Line
	Bury or Remove Existing Pipeline	Oil and Gas	Line
		Water	Line
	Bury or Remove Powerline		Line
	Fence Marking		Line
	Invasive Species Removal		Polygon
	Mesic Habitat Restoration		Polygon
	New Grazing System Watering Pipeline		Line
	Other Activity to Maintain or Improve Sagebrush Habitat		Line or Polygon
	Perching and Nesting Deterrents		Point
	Permanent Plug and Abandon of Oil or Gas Well		Polygon
	Reclaim Abandoned Mine Site		Polygon
	Road Removal		Line
	Seeding		Polygon
	Structure Removal	Building	Polygon
		Cell Tower	Polygon
		Industrial Site	Polygon
Solar Facility		Polygon	
Substation		Polygon	
Tall Structure		Polygon	
Turbine Pad		Polygon	

## **APPENDIX B. LIST OF ACRONYMS**

**BLM:** U.S. Bureau of Land Management

**EO:** Executive Orders 12-2015 and 21-2015

**GIS:** Geographic Information System

**HQT:** Habitat Quantification Tool

**MSGOT:** Montana Sage Grouse Oversight Team

**PLSS:** Public Land Survey System