



Montana Trail Stewardship Grant Program 2022 Grant Application Guidelines

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SUMMARY OF 2022 CHANGES TO MTSGP

FWP adjusts the MTSGP on an annual basis to better meet program goals and constituent needs.

In 2022, several changes were made to the 2022 Montana Trail Stewardship Grant Program. The table below discusses these changes and identifies a location within this document where additional information may be found.

Change	Description
Application Cycle Dates	The 2022 application cycle dates are December 15, 2021 – February 15, 2022. In 2021, the cycle opened in early November and closed in early February.
Project Dates	The project timeline for 2022 is 1 year shorter than the timeline for 2021. Projects awarded for 2022 must complete project work by October 15, 2024.
Max Funding Request	The maximum funding request for MTSGP is \$75,000 in 2022. In 2021, it was \$50,000.
Award Levels	Roughly 75% of all MTSGP available funds will be awarded to the top ranked projects at full funding levels. Roughly 25% of all MTSGP available funds will be awarded to the second tier of top ranked projects at 75% of the funding request.
30/30 Allocations	The MTSGP will allocate at least 30% of all annual funding to uses related to motorized recreation and at least 30% to uses related to nonmotorized recreation. If eligible requests for uses in either category do not total 30% of all available annual funding, the balance of the allocation may be reallocated to any other project type.
Application Review Process	Additional details have been included to clarify the MTSGP review process.
Priority Project Areas	Preference for priority project areas has been removed from the MTSGP.
Outdoor Recreation Accessibility	Language relating to ADA has been changed to language regarding outdoor recreation accessibility.
Ineligible Winter Grooming Expenses	Clarification on eligible and ineligible winter grooming expenses has been provided. No changes to eligibility have occurred.
Volunteer Trail Coordinator Eligibility	Clarification on eligibility of volunteer trail coordinators has been provided. No changes to eligibility have occurred.
Ineligible Project Types	Clarification on eligible and ineligible project types has been provided. No changes to eligibility have occurred.
Definitions	Definitions have been provided for a trail and a shared-use path. Projects must meet these definitions to be eligible for funding.
Procurement Processes	MTSGP award recipients will need to follow Limited Solicitation processes, unless contracting with a youth conservation corps entity or the recipient organization has adopted any part of the Procurement Act.

GRANT PROGRAM OVERVIEW

The Montana Trail Stewardship Grant Program (MTSGP) is a state program that provides funding for the development, renovation, and maintenance of motorized and nonmotorized recreational trails and trailside facilities throughout Montana and in its communities (23-2-108 and 23-2-109, MCA). The MTSGP is administered by Montana Fish, Wildlife & Parks.

Program Background

The MTSGP was authorized by Senate Bill 24 in the 2019 Legislative Session. Funding for the program comes from \$1.37 of Montana's \$9.00 light vehicle registration fee.

Eligible Funding Areas

- ▶ New trail and shared-use path construction
- ▶ Rehabilitation and maintenance of existing trails and shared-use paths, including grooming of trails for motorized and nonmotorized winter recreation
- ▶ Construction and maintenance of trailside and trailhead facilities, including but not limited to bridges, fencing, parking, bathrooms, latrines, picnic shelters, interpretation, trail signs, and trailside weed management

Development of trail safety and education programs, design and engineering, equipment¹ purchases, or land acquisitions are not eligible. See [Appendix A](#) for more eligible/ineligible funding areas.

30/30 Allocations

The MTSGP will allocate at least 30% of all annual funding to uses related to motorized recreation and at least 30% to uses related to nonmotorized recreation. If eligible requests for uses in either category do not total 30% of all available annual funding, the balance of the allocation may be reallocated to any other project type. Eligible requests are those which have passed preliminary review. At the time of application, the applicant determines the motorized and nonmotorized recreation uses, by percentage, for their project. Applications may have project work for both motorized and nonmotorized uses.

Definitions

A **trail** means a thoroughfare or track across land or snow, used for recreational purposes such as:

- ▶ Pedestrian activities, including wheelchair use
- ▶ Skating or skateboarding
- ▶ Equestrian activities, including carriage driving
- ▶ Nonmotorized snow trail activities, including skiing
- ▶ Bicycling or use of other human-powered vehicles
- ▶ Aquatic or water activities²
- ▶ Motorized vehicular activities, including all-terrain vehicle riding, motorcycling, snowmobiling, use of off-road light trucks, or use of off-road motorized vehicles

¹ "Equipment" is defined as an article of nonexpendable, tangible property having a useful life of more than five years and with an acquisition cost that exceeds \$1,000.

² Water trails are eligible for funding. Water trails are designated routes for watercraft along a lake, river, canal, or bay. In order to be eligible for funding, a water trail must 1) be open to non-motorized watercraft; 2) include access sites that are open to the public; 3) have developed information and trail data; and 4) be actively supported, managed, and/or maintained by at least one organization that can serve as the source of information and management.

A **shared-use path**, as defined in [60-3-302 MCA](#), means a multiuse path that is separated from motorized vehicular traffic by an open space, pavement markings, or a barrier within a highway or other road right-of-way and that is usable for transportation purposes by pedestrians, runners, bicyclists, skaters, equestrians, and other nonmotorized users. A **sidewalk**, as defined in [61-8-102 MCA](#), is not a shared-use path or a trail.

Available Funding

The amount of available funding is expected to be approximately \$1.0 million. Applicants may request up to \$75,000 in grant funds.

Eligible Applicants

Grant applicants may include federal, tribal, state, county, or municipal agencies (including school districts), and nonprofit recreational associations and clubs. An organization can submit only one grant application per grant cycle.

Project Start

Projects may begin once the Contract Agreement is signed in July 2022. Project expenses incurred prior to the start date are ineligible for reimbursement or match.

*The MTSGP is a reimbursement program. If awarded, an entity may receive reimbursement only **after** the entity has expended funds on an eligible expense and submitted adequate documentation.*

Match Requirement

Each project must have a ratio of 90% MTSGP funds to 10% matching funds. Matching funds may be cash or in-kind.

Application and Project Period

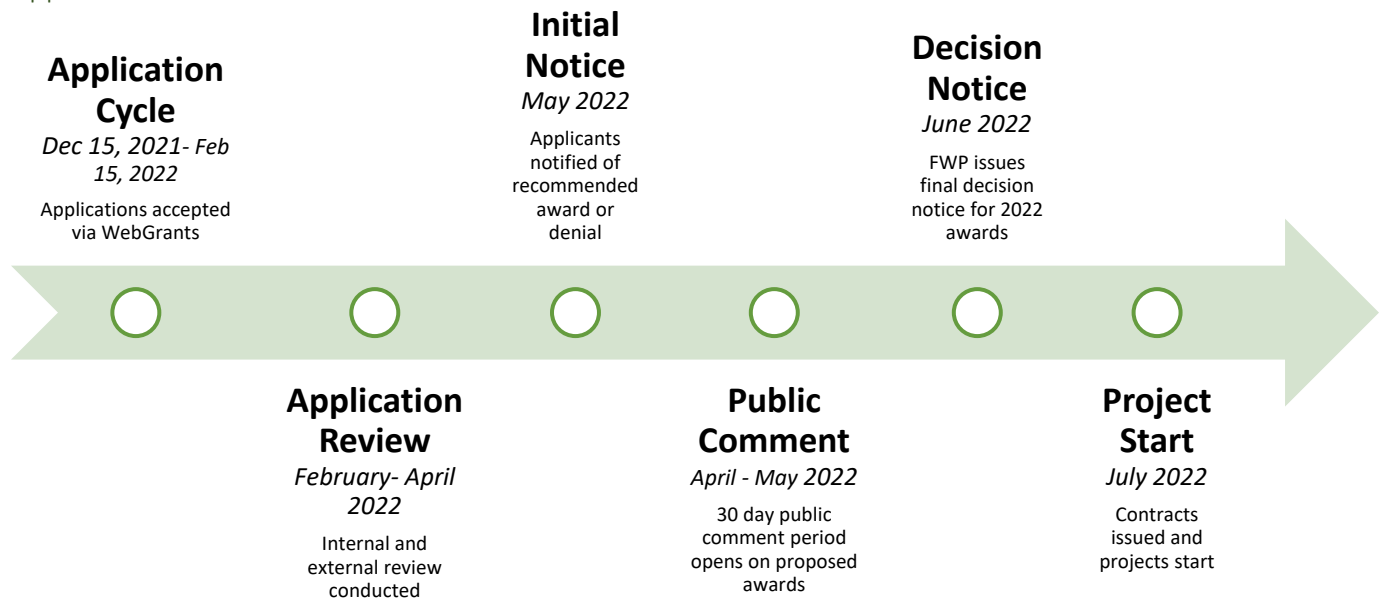
The application period is open December 15, 2021 to February 15, 2022 at 3:00pm MST.

Applications are accepted via WebGrants at funding.mt.gov. Successful MTSGP projects will be announced in April.

Project Close

The deadline to expend project funds or matching funds and complete project work is October 15, 2024. All reimbursement requests and a final report are due by December 31, 2024.

Application and Review Timeline



For More Information

Visit the MTSGP Webpage: <https://fwp.mt.gov/aboutfwp/grant-programs/trail-stewardship>

Contact the Program Manager, Carissa Beckwith: carissa.beckwith@mt.gov or 406-444-3343

GENERAL REQUIREMENTS

Documentation of Project Support/Approval

General letters of support are not required. Letters of commitment are required for some project types and activities. See [Appendix B](#) for a logic model on documentation requirements. Contact the Program Manager if you are unsure what is required for your project.

- ▶ **If the applicant is a nonprofit organization**, you must provide a copy of meeting minutes or a letter from the organization's leadership committing to the project if funding is awarded.
- ▶ **If your proposed project takes place on land not owned by the entity applying for funding**, you must provide:
 - Permission to access the land: a current Collection Agreement, Land Use Agreement, or other such legal document demonstrating landowner permission for your organization to access and use the land. If the documentation is not current, you must provide a letter from the entity affirming their commitment to enter into such an agreement before the project start date (July).
 - Permission to conduct specific project work on the land: If the agreement does not specify the type of work or timeframe that you may do work, additional documentation is required to demonstrate that your project is allowable. For example, if you have a Collection Agreement for winter grooming but plan to use funds to install culverts—and installation of culverts is not specified in the Collection Agreement—additional documentation is required.
 - Permission for the public to access the land: [Landowner Permissions, Easements, and Public Access](#).
- ▶ **If your application references a match commitment from another entity** (cash, donation, volunteer labor, etc.), you must provide a current letter or other such documentation from the entity stating their commitment to this specific MTSGP project.
- ▶ **If your application references any other type of commitment from another entity** (e.g. a commitment to maintenance), you must provide a current letter or other such documentation from the entity stating their commitment to this specific project.

No other documentation of support is required to apply although Letters of Support are accepted. If you choose to submit any Letters of Support, be sure they meet the following requirements:

- ▶ Letters are typed
- ▶ Letters are from an organization, not an individual (unless an individual is expressing a commitment to the project or landowner is an adjacent, affected landowner)
- ▶ Letters are signed and dated
- ▶ Letters are current and reference the specific project/grant year for which you are applying
- ▶ Letters are unique

Landowner Permissions, Easements, and Public Access

The public must be assured legal access to trails and trail-related facilities developed or maintained with State funds. Applications without adequate landowner permissions will be considered incomplete and will not be considered for funding. The program places a higher value on longer-term easements or agreements that have the potential of allowing for public access in perpetuity.

Private Property

On the application, you must include an owner-signed legal easement or lease agreement that will allow public access to the area/trail for a minimum of fifteen years *past the time of application*. For the 2022 application cycle, all agreements must allow public access until at least 2037. The exception is for winter grooming operations; winter grooming operations on private land must include an easement or legal agreement that will allow for winter grooming for a term of at least five years.

Public Land

On the application, you must include documentation of approval for the project from the corresponding land management agency (e.g. a Collection Agreement or letter of support from the land management agency).

In each case above, if the agreement will expire before the MTSGP project start date, the application should also include a letter/documentation from the landowner or land management agency stating its intent to reissue the agreement in time for project work to begin.

Right-of-Way, Railroad Certifications, and Public Utility Certifications

Each application must include all necessary public right-of-way, railroad, and/or public utility certifications or confirm that no such certifications are required for the project. All certifications must be guaranteed at the time of application for your project to be considered for funding.

If your project includes trail construction or improvements along any State Highway right-of-way, you must contact your local Montana Department of Transportation (MDT) office and follow all applicable requirements. Typically, applicants working along a State Highway will need to submit an Encroachment Permit with the application or a Letter of Intent stating that the project has been approved by MDT.

Coordination and certification with a railroad and/or public utility must include certification of one of the following:

- ▶ No railroad/utility facilities will be affected
- ▶ All railroad/utility work will be completed prior to the start of project work
- ▶ Arrangements are in place to have railroad/utility work undertaken during project work

APPLICATION REVIEW AND SCORING CRITERIA

All award decisions will be made in late Spring 2022 by FWP. The MTSGP application review process consists of multiple steps.

Review Panels

Internal Review Panel: 2-3 FWP employees, including the MTSGP program manager, a representative from the Financial Assistance and Compliance Bureau, and/or another representative of the agency.

State Trails Advisory Committee (STAC): a group of individuals (members) appointed by the Governor and agency officials from the state and federal government (advisors) who represent diversified trail interests throughout Montana. Read more on the STAC webpage. Members serve three-year terms.

Application Review Process

Internal Review – Preliminary Review: The MTSGP program manager, as part of and in conjunction with the Internal Review Panel, performs a technical review of each application. The preliminary review rubric can be found in [Appendix C](#). Applications which do not pass preliminary review will not be reviewed by the State Trails Advisory Committee or considered for funding.

Internal Review Panel – Review: Internal Review Panel members also review the overall application based on the MTSGP Scoring Criteria and provide individual scores per criterion.

Internal Review Panel – Meeting: The Internal Review Panel meets to determine which applications did not meet preliminary review requirements based upon the preliminary review rubric. Changes to the self-reported applicant percentages for motorized and nonmotorized use are discussed; all changes must be approved by the Panel.

State Trails Advisory Committee Review: State Trails Advisory Committee (STAC) members review all applications that passed preliminary review as determined at the Internal Review Panel’s meeting. Committee members give each application an overall project score based on the Scoring Criteria.

Average application scores for both the Internal Review Panel and STAC are collected. From these two averages, one overall average score per project is placed in a ranked recommendation list which includes summarized notes from reviewers. This ranked recommendation list is provided to STAC and Internal Review Panel members prior to the Funding Decision Meeting. This ranked recommendation list will include recommended funding per project based upon that project’s ranking. This cycle,

- ▶ Roughly 75% of all available funding for MTSGP in 2022 will fully fund the top-ranked projects based upon the ranked recommendation list of average scores. Top-ranked projects may experience small budget reductions due to ineligible project expenses or other budget issues.
- ▶ Roughly 25% of all available funding for MTSGP in 2022 will fund, at 75% of their request, the next tier of projects by ranked recommendation.
- ▶ The ranked recommendation list will be adjusted, as necessary, to meet the 30% guaranteed allocation levels for motorized and nonmotorized projects by allocating the necessary funds to the next highest ranked project in a category until the 30% allocation is met.

Funding Decision Meeting: The STAC and Internal Review panelists meet to review the ranked recommendation list. At the funding decision meeting, a project may only be moved upwards, downwards, or removed from consideration within the ranked recommendation list if:

- New concerns about the project have materialized that were not brought to attention during the review period
- Documentation required prior to the review meeting was not provided by the applicant;
- A MEPA review of the project found the applicant's [MEPA analysis](#) to be unsatisfactory; or,
- A project moving within the ranked recommendation list for one of the above reasons has resulted in the 30/30 requirement not being met. **Should this occur, the process identified above will be followed to meet the 30/30 requirement.**

Any movement of a project within the ranked recommendation list requires a majority vote by STAC members and must be supported by the appropriate rationale, above. A finalized list of recommended awards is determined by majority vote of STAC members.

Recommended Awards: The final recommended list is provided to the Parks & Outdoor Recreation Division Administrator for consideration. FWP's list of recommended MTSGP awards is then opened for public comment. At this time, applicants are notified of their recommended award.

FWP Decision Notice: At the close of the public comment period, the MTSGP Program Manager incorporates all public comments into a FWP Decision Notice. This Notice is published by the Parks & Outdoor Recreation Division Administrator. At this time, all recommended awards are finalized as official awards.

Application Scoring Criteria

Internal Review Panel members will give each criterion a base score of 0-10 (10 being "Excellent or Very Strongly Agree"). The base score is then multiplied by the criterion weight, which yields the score for that criterion. State Trails Advisory Committee members give one overall score based on the combined Scoring Criteria.

▶ **Access and Connectivity (x1)**

The proposed project is accessible by the public and improves the public's connection to existing trails and/or natural, cultural, historical, and recreational areas.

▶ **Recreational Opportunity (x2)**

The proposed project provides expanded recreational opportunity(s) for a variety of user groups. Additional consideration will be given to projects providing increased recreational access for nontraditional trail users (e.g. persons with disabilities, senior citizens, etc.).

▶ **Need for Project (x2)**

The application shows a clear need/demand for the proposed project. Need/demand may be demonstrated with planning documents, formal agreements, research/data, photos, letters of support, etc.

▶ **Benefits of Proposed Project (x2)**

The application identifies and justifies unique benefits of the proposed project. Such benefits may include:

- Protection and enhancement of natural resources
- Cultural or natural resource interpretation, ethics, safety, education, etc.
- Development of partnerships to carry out the project, future project maintenance

▶ **Short- and Long-term Maintenance (x1)**

The application demonstrates a commitment to short-term and long-term maintenance of the proposed project. The application describes a maintenance plan and identifies the party(s) responsible. If applicable, letters of commitment are provided from any entity that will perform or share in the maintenance of the proposed project.

▶ **Application Quality/Clarity (x1)**

The application provides a clear and complete overview of the proposed project, budget, and timeline. Responses are specific to the proposed project, grammar/spelling errors are minimal, and the budget is detailed and justified.

ENVIRONMENTAL REVIEW REQUIREMENTS

MTSGP projects must meet Montana Environmental Policy Act (MEPA) requirements to be eligible for funding. Applicants may upload environmental review documents from within a three-year timeframe. Any documents dated January 2019 and newer will be considered acceptable. On the application, you must attach relevant environmental review documentation regardless of whether the documentation has been submitted with another grant program's application.

Non-Public Land Projects: Environmental Review Requirements by Project Category

For entities *not working on state, federal, or tribal land*, use the categories and descriptions below to determine what project type(s) are associated with your project proposal. As referenced below, "trail" includes shared-use paths. Environmental requirements per project category are included. If your proposed project includes work in several project categories, you must complete the most stringent environmental documentation requirements. For instance, if your snowmobile grooming project also includes summer trail maintenance (brushing), you must complete a Categorical Exclusion document.

Construction and Improvement

Description: New construction and improvement of trails or trailside facilities:

- ▶ Any new trail tread proposed, including creation of a new trail, widening of an existing trail, or resurfacing an existing trail
- ▶ Construction of new trail structures (e.g. new culverts/drainage structures, bridges)
- ▶ Construction of new trailhead/trailside structures (e.g. latrines, picnic areas, parking areas)
- ▶ Placement of sheds/structures beyond an established building footprint

Environmental Documentation Requirements: A proposed project must undergo a MEPA Environmental Analysis (EA). On the application, you must attach the Environmental Analysis Form located on the <https://fwp.mt.gov/aboutfwp/grant-programs/trail-stewardship>. Other forms may be accepted if they include an analysis equal to or greater than what is found in FWP's EA Form.

Maintenance and Repair

Description: General maintenance and repair on established trails or trailside facilities:

- ▶ Grooming for cross-country ski areas on existing, approved groomed routes
- ▶ Brushing, clearing of vegetation from previously established trail corridor
- ▶ Repair of trail tread and trail structures (e.g. drainage structures) to their previous condition
- ▶ Replacement of trail signage or placement of signage within an established trail corridor or trailhead/trailside facility
- ▶ Weed management within an established trail corridor
- ▶ Other activities identified as "maintenance" in the landowner's management/maintenance plan

Environmental Documentation Requirements: A proposed project may qualify for a Categorical Exclusion (CE). Applicants must complete all steps in the document. On the application, you must attach one of the Categorical Exclusion Forms located on the [Program Website](#).

Grooming for Snowmobile Areas on Existing Routes

Description: Grooming on existing snowmobile routes as approved by the land management agency.

Environmental Documentation Requirements: A proposed project that only includes grooming of existing, approved routes at a snowmobile area requires no environmental review. Such projects are exempt from environmental review under MEPA ([23-2-657 \(2\), MCA](#)).

Public Lands Projects: Environmental Review Requirements

Except for those proposing only snowmobile area grooming, entities proposing work on state, federal, or tribal public lands must consult the appropriate land management agency(s) for environmental documentation. It is the applicant's responsibility to collect and review the documentation to ensure it is relevant to their proposed project and from within a three-year timeframe. On the application, entities working on public lands must attach environmental documentation signed/approved by the appropriate land management agency. Entities working on US Forest Service lands may utilize the US Forest Service Categorical Exclusion form located on the [Program Website](#).

A proposed project that only includes grooming of existing, approved routes at a snowmobile area on public lands requires no environmental review. Such projects are exempt from environmental review under MEPA (23-2-657 (2), MCA).

Tribal entities conducting work on tribal lands do not need to submit any MEPA documentation.

Tiering from Other Environmental Documents

When appropriate, a proposed project's environmental review may be tiered from an existing environmental review. Land management agencies, for example, often tier their documentation for proposed projects from more-encompassing environmental documents (e.g. a forest-level Environmental Analysis, Travel Plan, Decision Notice, etc.). If you are tiering your environmental review from another document, attach a letter to your application and include the following information.

- ▶ The name of the document from which your environmental review is being tiered. In addition, attach either the document itself to your application or, if it is available online, you may link to it in the letter.
- ▶ A summary of the project impacts as discussed in the document. Unless the document is specific to the proposed project, reference where in the document each discussion can be found.
- ▶ If any negative impacts were identified, include a summary of mitigation measures that will be taken to reduce negative impacts.
- ▶ If the environmental review document is not from within a three-year timeframe, include a statement of revalidation from the agency that conducted the original review.

Compliance with Existing Laws, Regulations, Policies, and Ordinances

All projects seeking funding from the MTSGP must comply with existing federal, state, and jurisdictional laws, regulations, and ordinances. If applicable, such compliance should be discussed and demonstrated on the project's environmental review documentation.

FWP encourages public involvement in all proposed MTSGP projects. The MTSGP does not require applicants to post a legal notice and conduct a 30-day public comment period to apply to the program. At the time of application, however, the applicant should be able to demonstrate it has involved the public, adjacent landowners, and other interested parties in the proposed project planning/approval. Public participation documentation may be uploaded with an application.

BUDGET AND MATCHING FUNDS

See [Appendix D](#) for more details regarding match, reimbursed expenses, and documentation that will be required to receive reimbursement if an award is made.

Creating a Budget in WebGrants

When applying for MTSGP funding in WebGrants, you will be instructed to fill out two budget forms: the Budget Form and the Funding Strategy Narrative Form. The WebGrants Budget Form should summarize your budget numbers. The WebGrants Funding Strategy Narrative Form should detail budget line items and provide short narratives about your funding strategy. Be sure the information on your Budget and Funding Strategy Narrative Forms is clear, detailed, and justified.

All applicants should be aware of FWP Purchasing Guidelines if proposing to use program funds or match to purchase any materials and/or services from a single vendor over \$5,000. For more information, see the [Purchasing Guidelines Section](#).

Match Requirements

Entities must ensure matching funds meet FWP requirements. Applications that do not include the minimum amount of match may not meet preliminary review requirements.

To meet FWP requirements, matching funds must:

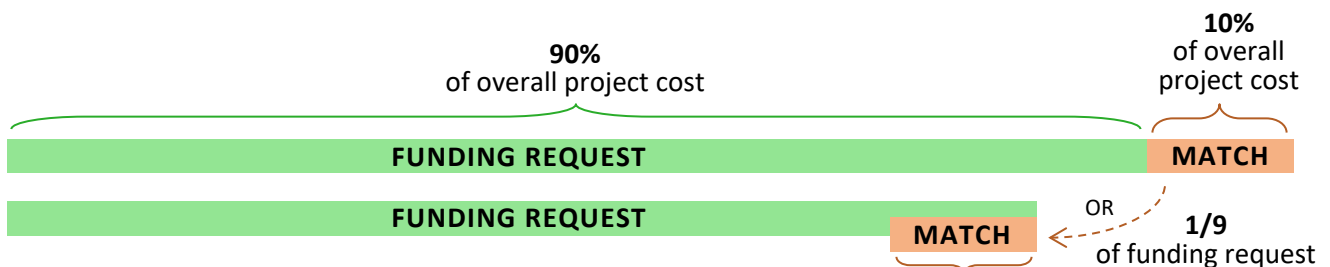
- ▶ Be an eligible MTSGP activity
- ▶ Be clearly tied to the proposed project scope
- ▶ Be incurred after the project start date (except design/engineering costs which may be incurred up to twelve months before the project start date)
- ▶ Be guaranteed at the time of application
- ▶ Have a total value of at least 10% of the total project cost (funding request plus match)

Within the WebGrants application, match items should be categorized as Sponsor Funds or In-Kind Contributions, according to the descriptions below.

Sponsor Funds: The cash an entity has guaranteed to spend on the proposed project, including materials and salary it will use on the proposed project. Partner organization materials and salaries are also considered sponsor funds.

In-Kind Contributions: The value of volunteer labor, donated professional services, donated materials, etc. For calendar year 2022, general volunteer labor may be calculated at \$25/hour.

The minimum amount of match shown on an application must be 10% of the total project cost (funding request plus match), which is equal to 1/9 of the funding request (see below).



Use either formula to calculate your match requirement:

$$\begin{aligned} \text{Minimum Match} &= (\text{Funding Request} / 0.90) - \text{Funding Request} \\ &\text{or} \\ \text{Minimum Match} &= \text{Funding Request} \times (1/9) \end{aligned}$$

Volunteer Hours as Match

The MTSGP allows volunteer hours to be used as match with proper documentation. The number of volunteer hours shown on your application must be guaranteed and/or justified based on the amount of volunteer labor your organization utilized on similar projects.

If your project is funded, all volunteer hours used as match must be documented using the most current volunteer log (which requires volunteer and volunteer manager signatures). Volunteer hours will not be accepted as matching funds if documentation is missing information required on FWP's volunteer logs.

Using Other FWP Grant Programs' Expenses as Match

MTSGP applicants may include expenses/reimbursement from other FWP grant programs as match in their project budgets. For example, expenses from a Recreational Trails Program award may be used as match on your proposed MTSGP project. For such match to be eligible, the work that will be reimbursed through another grant program:

- ▶ Must fall under your MTSGP project scope
- ▶ Must take place during your MTSGP period of performance

All match must be guaranteed at the time of application. Therefore, you cannot include match from an unawarded grant, an application in review, etc.

It is recommended you contact the Program Manager if considering including match from another grant program in your application.

PURCHASING GUIDELINES

Entities planning to purchase services or materials from a single vendor over \$5,000 in value with grant funds must follow procurement procedures before selecting a vendor. *Documentation is not required at the time of application.* However, if awarded funding, the procurement process must be adequately documented on the corresponding reimbursement request(s) or the expense may not be claimed for reimbursement or match.

MTSGP recipients must follow, at a minimum, the Limited Solicitation Process for all contracts above \$5,000 unless:

- The recipient organization is contracting with a youth conservation or service corps entity (such as MCC).
- The recipient organization has adopted any part of the Procurement Act, in which case, the recipient organization must follow those portions they have adopted and provided appropriate documentation.

The Limited Solicitation Process (see [ARM 2.5.603](#))

If you are planning to use grant funds/match to reimburse the purchase of a service or supply valued over \$5,000, you must obtain a minimum of three viable quotes, if available, before selecting a vendor. The selected vendor should be the lowest acceptable quote.

[Appendix E](#) is a Limited Solicitation Process bid sheet that may be used to capture quotes and submitted prior to requesting reimbursement if an award is made.

OUTDOOR RECREATION ACCESSIBILITY

The MTSGP strives to integrate and maximize accessibility into the full range of recreation opportunities while conserving the outdoor experience via maintaining its character and experience.

Trail designers should seek opportunities to incorporate accessible features and elements. The MTSGP does not require all projects to comply with accessibility guidelines and standards; however, preference is given to applications that incorporate accessible features and elements, especially for new construction projects

For example, where appropriate, MTSGP projects should:

- ▶ Provide the required level of accessibility and be served by an accessible route where trail-related facilities such as parking lots, shelters, toilets, drinking fountains, and other features are provided on or along an accessible trail site
- ▶ Include trail routings that meet accessibility criteria to ensure that there are recreation opportunities for a variety of trail users, both traditional and non-traditional
- ▶ Account for people experiencing disabilities that may arrive at trail facilities by horse, OHV, or snowmobile, with assistance, or by other means

The [Accessibility Guidebook for Outdoor Recreation and Trails](#) (2016), published in cooperation with the U.S. Department of Transportation, Federal Highway Administration's Recreational Trails Program, and the USDA Forest Service, contains useful concepts to help organizations maximize accessibility without changing the setting in outdoor recreation areas and on trails.

CONSIDERATIONS FOR SPECIFIC PROJECT TYPES AND EXPENSES

Administrative Cost Rate for Grantees

Administrative costs are those that support the entire organization and are not specific to the proposed project. The MTSGP allows grantees to use an administrative cost rate (up to 7% of the grant request) to cover such expenses. The administrative cost rate must be included in the budget at the time of application. The administrative cost rate must be included as a project expense and may not be used as match.

For example, if you are requesting \$10,000 in MTSGP funds, you may include a line item of up to \$700 (\$10,000 x 7%) for administrative costs.

If the administrative cost rate is in the grantee's approved budget, it must be applied consistently on reimbursement requests throughout the project period. No documentation is required to substantiate the administrative cost rate once the budget documents are approved by the Program Manager.

Administrative costs may include:

- ▶ Accounting, auditing, contracting, budgeting, and general legal services
- ▶ Facility occupancy costs (e.g., rent, utilities, insurance, taxes, and maintenance)
- ▶ General liability insurance that protects the organization
- ▶ Depreciation on building and equipment
- ▶ Office supplies
- ▶ General and administrative salaries/wages

Constructing or Resurfacing a Trail

Applicants proposing to build or resurface a trail should justify the chosen trail-surface type in their application.

Regardless of trail surface, construction costs and maintenance costs vary widely for each surface type. Applicants should therefore reach out to potential contractors for a quote(s) to develop the most detailed, accurate budget for their proposed project. Applicants may also consider reaching out to trail groups/communities that have undertaken similar projects to get more information.

Proposals for Asphalt or Concrete Trails

The MTSGP can be used to fund asphalt or concrete trails or shared-use paths. Due to the high upfront cost of these mediums, applicants must answer additional questions on the application to justify the need for asphalt/concrete. A detailed maintenance plan and parties responsible must also be identified.

Maintenance Plans

Any applicant proposing to construct or resurface trails must include a detailed maintenance plan on the application. A detailed maintenance plan should:

- ▶ Identify the entity(s) which will perform both short- and long-term maintenance
- ▶ An explanation of how the maintenance will be funded
- ▶ The maintenance activities which will take place; and
- ▶ The anticipated timeline for performing maintenance

Winter Grooming Costs

The MTSGP uses a groomer reimbursement methodology that employs an hourly rate based on average groomer expenditures. These rates are used in lieu of receipts for trail groomer expenses. For projects using the trail grooming reimbursement rates, the included expenses (see below) may not be reimbursed for exact cost or used as match.

Expenses covered by the grooming reimbursement rate:

- ▶ Fuel
- ▶ Oil
- ▶ General maintenance and repairs (including labor)

Hourly Rates:

- ▶ Utility sled used for trail grooming: \$20.00 per hour (does not include operator labor)
- ▶ Large groomers (e.g. PistenBully): \$120.00 per hour (does not include operator labor)

MTSGP funds may be used to reimburse groomer expenses, according to the groomer type and record of hours. Grooming hours and mileage must be documented using daily grooming logs and monthly summary sheets. Examples of these sheets can be found on the [Program Website](#).

On the application, show the math you used to calculate your overall grooming cost. Include a breakdown of expected hours by month.

Expenses Not Included in the Reimbursement Rates

Grooming-related costs may be reimbursed with MTSGP funds or used as match based on exact expenditures. Expenses not covered by the grooming reimbursement rate:

- ▶ Grooming machine operator labor
- ▶ Costs not associated with actual operation of the equipment (e.g. signs, weed spray)

Ineligible Winter Grooming Expenses

Some grooming-related costs are not eligible project expenses. These include:

- ▶ Costs associated with storing winter grooming equipment, including building leases, utility costs, groomer shed construction or maintenance, etc.
- ▶ Costs associated with maintenance of grooming equipment, including any maintenance expenses not included in the hourly groomer rate. Ineligible maintenance expenses may include volunteer labor to work on machines, paid labor to work on machines, machine parts, etc.

Salaries/Labor Costs

Proposed salary/labor costs must be associated with on-the-ground trail efforts. For salaries/labor costs to be considered for MTSGP funding, the application must identify the following:

- ▶ The title of each position proposed to be funded with MTSGP funds
- ▶ The number of hours each position will work on this project and an overview of the work they will perform
- ▶ Each position's hourly rate of pay and/or how you've calculated the value of the salary(s) you are proposing for reimbursement

Volunteer Trail Coordinator Positions

Volunteer Trail Coordinator positions may be an eligible MTSGP expense. The application must include a compelling explanation as to the need for the position and how it uniquely benefits various trail user groups and recreation. Approved grant funding for Volunteer Trail Coordinator positions will cover salaries and travel per diem only. Projects requesting *only* Volunteer Trail Coordinator funding will not be considered. Volunteer Trail Coordinator funding must be utilized in connection to a larger trail project.

Trail Steward Positions

Trail Steward positions may be an eligible MTSGP expense. The application must include an explanation as to the need for the position and how it uniquely benefits various trail user groups. Approved grant funding for Trail Steward projects will cover salaries and travel per diem only. Enforcement activities are not an eligible use of MTSGP funds.

Project Design and Engineering Costs

MTSGP will not reimburse project design and engineering costs.

Design and engineering costs directly related to your proposed project may be used as match and may be incurred up to twelve months before the start of the project period. Design and engineering expenses incurred prior to the start of the project must be detailed in the application.

When applicable, applications should include project design and engineering information as supplemental documentation to demonstrate the project is ready to proceed.

Travel-Related Costs

Travel-related expenses may be used as proposed project expenses or match. If funded, the state rates applicable during the period of performance must be used for reimbursement. Current state rates for this biennium and/or calendar year are shown below for mileage, per diem, and use of personal property. Use the rates below to build your project budget on your application, bearing in mind the rates may have been updated once you submit a reimbursement request.

Vehicle Mileage

MTSGP funds can reimburse miles driven to or from an MTSGP project site at the current, approved state rate. The state rate to be used on the application is \$0.56 per mile³. The current Travel Form must be used to document the miles being reimbursed; that form will include the current state rate at the time of reimbursement.

Meals by Receipt (at Real Cost)

A grantee organization may be reimbursed for groceries purchased for MTSGP-funded trail crew meals. In this case, all itemized grocery receipts and proof of purchase(s) must be included with a reimbursement request.

³ If you are seeking reimbursement for more than 1,000 miles driven by one individual in a calendar month, the reimbursement rate for the miles driven over 1,000 miles lowers to \$0.53 per mile.

Meals by Meal Allowance (Per Diem)

MTSGP funds can reimburse meals by allowance at the current, approved state rate. To be eligible for a meal allowance while traveling to/from a MTSGP project, an individual must be in a travel status for more than three continuous hours within one of the following time ranges. The individual must also be at least 15 miles from the organization headquarters or home, whichever is closer. The current Travel Form must be used to document the meal allowances being requested; that form will include the current state rate at the time of reimbursement.

Time Range	Meal Allowed	State Rate
12:01am to 10:00am	Morning Meal	\$7.50
10:01am to 3:00pm	Midday Meal	\$8.50
3:01pm to Midnight	Evening Meal	\$14.50

If the individual travels each day from headquarters or home to a specific MTSGP work site(s) within the vicinity of their headquarters or home, they are not in a travel status.

Use of Property

If an individual uses the property listed below specifically for a MTSGP project, you may claim the appropriate amount for property expenses. The current Travel Form must be used to document the property expense(s) being requested; that form will include the current state rate at the time of reimbursement.

Type of Property	State Rate (per day in use)
Motorized OHV or Boats	\$15.00
Horse Trailer	\$15.00
Other Trailer	\$5.00
Horse (Pack Animal)	\$16.00

APPENDIX A: ELIGIBLE/INELIGIBLE PROJECT TYPES AND ACTIVITIES

Not all activities are eligible for MTSGP reimbursement or match. The following is a list of eligible and ineligible project types.

Eligible Project Types

- ▶ Development of urban trail linkages near homes and workplaces
- ▶ Providing features to assist individuals with disabilities
- ▶ Construction of new trails and shared-use paths
- ▶ Rehabilitation and maintenance of existing trails and shared-use paths, including grooming of trails for motorized and nonmotorized winter recreation
- ▶ Construction and maintenance of trailside and trailhead facilities, including but not limited to bridges, fencing, parking, bathrooms, latrines, picnic shelters, interpretation, trail signs, and trailside weed management
- ▶ Restoration of areas damaged by trail use
- ▶ Trail projects on routes legally designated or otherwise appropriately approved by the land managing agency
- ▶ Trail projects on trails that are not currently under litigation in a court of law

Ineligible Project Types

- ▶ Purchase of equipment (an article of nonexpendable, tangible property having a useful life of more than five years and with an acquisition cost that exceeds \$1,000)
- ▶ Development of trail information and ethics education programs/materials
- ▶ Acquisition of easements and property for trails
- ▶ Facilities (shelters, toilets, picnic tables, benches, etc.) located in park or other settings which are not clearly and solely for the benefit of trail users (versus an enhancement for park users)
- ▶ Feasibility studies and planning
- ▶ Law enforcement activities
- ▶ Maintenance or storage of equipment, including winter grooming equipment
- ▶ Purchase of materials for equipment
- ▶ Weed management outside of an established trail corridor
- ▶ Projects managed as profit-making entities
- ▶ Trail projects on routes not legally designated by the appropriate land managing agency
- ▶ Projects that displace fish and wildlife species, reduce habitat effectiveness, cause irreparable damage to vegetation, soils, water, and wild public lands, and/or substantially increase conflicts
- ▶ Trails, or any project pertaining to that trail, currently under litigation in a court of law
- ▶ Projects that have the potential to substantially alter legal use patterns or make the trail substantially less desirable for the spectrum of current users
- ▶ Projects unrelated to a trail or a shared-use path
- ▶ Work involving a water trail that has not been designated

APPENDIX B: LOGIC MODEL FOR MTSGP DOCUMENTATION REQUIREMENTS

Documentation of Project Support/Approval		Documentation of Landowner Permissions			Documentation of Public Access	
IF	THEN	IF	THEN	And THEN	IF	THEN
Your Organization is	A Letter of Commitment from your Organization is	Your Organization	Documentation permitting your organization to access the land is	Documentation permitting the project work upon the land is	The land the project will be on is	Documentation guaranteeing Public Access is
A private or nonprofit organization	Required from the organization’s leadership committing to the proposed project if funding is awarded	Owns the land upon which your proposed project will take place	Not required	Not required	Publicly owned (municipal, state, federal, tribal)	Not required
A public (municipal, state, tribal, or federal) organization	Not required	Plans to use land owned by a public entity to do project work	Not required	Required, in the form of an agreement allowing applicant to conduct the type of project work (winter grooming, summer maintenance, etc.), or specific project work (building a trail, constructing a trailhead, etc.)	Private, including owned by a nonprofit	Required, in the form of a legal agreement guaranteeing public access to the project/land for the next 15 years* *The exception is for winter grooming on private land. Agreements must be for a minimum of 5 years.
		Plans to use land owned by a private entity (including nonprofits) to do project work	Required, in the form of a legal agreement allowing your organization permission to access the land for at least the duration of the project period			

Documentation of Match Commitment		Documentation of Maintenance Commitment		Documentation of Right-of-Way, Railroad, and Public Utility Certifications	
IF	THEN	IF	THEN	IF	THEN
Your proposed project and MTSGP budget	A letter of commitment is	Your application and proposed project	A letter of commitment is	Your proposed project	You must provide documentation of
Reference project match supplied from another entity (cash, donation, volunteer labor, etc.)	Required from the entity stating their commitment, the type and amount of the commitment, to the project	Reference work that will be maintained by another entity in the future (for instance, if a trail you constructed will be maintained by your local City)	Required from the entity stating their commitment and plans to the future of the project	Includes trail construction or improvements along any State Highway right-of-way (including many shared-use paths)	Contacting your local Montana Department of Transportation (MDT) office and any additional documentation requirements required by MDT
Are composed entirely of expenses incurred and committed from your organization	Not required	Will be maintained by your organization in the future and does not include the resurfacing or construction of a trail	Not required but suggested	Includes railroad-related facilities or traffic control devices located within the limits or corridor of your project (including signs, markings, crossings, etc.)	Certification of coordination with the railroad/utility and one of the following outcomes: <ul style="list-style-type: none"> ▶ No railroad/utility facilities will be affected ▶ All railroad/utility work will be completed prior to the start of project work ▶ Arrangements are in place to have railroad/utility work undertaken during project work
		Will be maintained by your organization in the future but <i>does</i> include the resurfacing or construction of a trail	Required, stating what, when, and by who maintenance will be done in the short and long-term	Includes work within a right-of-way or includes public utility facilities within the limits or corridor of your project	

APPENDIX C: MTSGP 2022 APPLICATION PRELIMINARY REVIEW RUBRIC

The Internal Review Panel performs a technical review of each application based on the rubric presented below. Failure to meet a criterion results in a checkmark in the appropriate column. If an application has one or more check marks in column A, or two or more check marks in column B, the application will not move forward for consideration.

Criteria	Additional Details	Column A	Column B
The application is complete.	<i>All</i> questions have been answered to a minimum level necessary to score and understand the project. <i>All</i> necessary documents have been attached and are readable.	NA	
The project is an eligible use of MTSGP funds.	“Project” refers to the overall scope and goals presented in the application. Small instances of ineligible budget line items will not result in the application failing preliminary review unless otherwise noted.		NA
The project is ready to proceed.	The timeline presented in application corresponds to the grant period. All necessary permits, agreements, environmental documentation, etc. have been completed and compiled. The project scope of work is attainable within the grant period.		NA
The match requirement has been met.	For all applicants, the match requirement is 10% of the total project cost.	NA	
The environmental review requirements have been met.	The appropriate environmental review documentation has been uploaded. The uploaded documentation demonstrates a willingness from the applicant to complete the document to the best of their ability. The documentation is pertinent to the project, scaled appropriately, and signed by all necessary representatives.		NA

	Federal agencies may upload draft environmental documentation with a memo stating when the expected decision will be finalized, if this finalization date is prior to March 15.		
The application includes adequate landowner permission.	Adequate landowner permission allows for continuous public use/access. If the applicant is operating on public land, a signed agreement valid for the term of the grant with the appropriate public land agency has been uploaded.		NA
The application includes approval of the project from the applicant organization's leadership, if a private entity.	A signed and dated letter attesting to this approval accompanies the application.	NA	
At the time of application, the applicant's risk level with FWP is below "High Risk".	All new applicants are designated at a medium risk level. Applicants with open Outdoor Recreation awards that are not in compliance or have not shown substantial progress are designated as high risk.	NA	

APPENDIX D: FAQs ABOUT MATCH, FINANCIAL TRACKING, AND REQUIRED FORMS

What is Match?

Match contributions are project costs that are *not* paid by subaward or award funds. Rather, they are paid by you (the recipient) or a third party (a project partner or beneficiary). Match is also known as “cost share” because you are sharing in the government’s costs for your project.

There are two types of match:

Cash match is a contribution of actual cash to the project or a project-related expense that can be verified. It can range from cash donations, to funds from a grant or loan program, to state or local appropriations, to corporate contributions. It can also include the costs of employee salaries and benefits, the supplies you buy, or the cost of hiring a contractor — whether paid by you, your project partners, or beneficiaries.

In-kind match is a non-cash contribution. Donations may take the form of supplies, facilities, services, equipment, travel, indirect costs on a per-program basis, or volunteer labor.

Whether cash or in-kind, every match contribution must clearly support your project.

What can NOT be considered as match in the Outdoor Recreation Programs?

- ▶ For any Outdoor Recreation grant program, match provided via another Outdoor Recreation grant award must be clearly noted at the time of application.
- ▶ For any Outdoor Recreation grant program, match must be confirmed at the time of application. This means that proposing match from a non-confirmed, non-awarded grant is not allowable.
- ▶ For any Outdoor Recreation grant program, if the recipient is internal (a state park, Montana WILD, a regional office, etc.), all match needs to be verified by the Financial Assistance and Compliance Bureau prior to submitting a grant application. No match can be drawn from cost pools funded through federal indirect cost shares (FWP Design and Construction, for example).
- ▶ All match must be approved at the time of award by being incorporated into the award agreement to be used as match for the project. Budgets, including matching expenses, may be adjusted post-award, but expenses must be approved by the program manager before being incurred.

How do I assign value to cash match?

When it comes to cash match, there is either actual cash or a verifiable expense for the item, so the process of determining the value of match contribution is usually straightforward.

Personnel costs: if you (or a project partner) contribute an employee’s time to help on the project, the contribution should be valued at the employer’s actual cost of the salaries/wages/benefits. That is, it should include both compensations paid to the employee and the employer’s payroll costs (taxes, workers comp, and insurance) per employee. The value can be stated as an hourly or daily cost.

How do I determine a value for in-kind match?

In-kind contributions usually do not have a known dollar cost, but an estimate of value can be arrived at based on market rates or the cost of similar items. A rule of thumb is to consider what a reasonable and

prudent person would pay for the item.

General Expenses are generally valued at fair market value at the time of donation. Sometimes this means the price you would pay if you were to purchase the item. Other times, it's more appropriate to consider the cost of renting or using the item for a short period of time. Examples of expenses include supplies or materials; the use of office space, a conference room, or other facility; the use of equipment; and donated services.

Overhead, facilities and administration rate, or indirect costs represent the expenses of doing business that are not readily identified with a particular grant, contract, or project function. Examples include rent and utilities, accounting department costs and personnel department costs, executive salaries, etc.

- ▶ **For Montana Trail Stewardship Grant Program (MTSGP):** administrative costs can be reimbursed as up to 7% of the grant request. They cannot be used as match.

Travel expenses have set values. Meal and lodging costs are determined by the State of Montana and are updated on a regular basis. Mileage expenses are reimbursed at the federal rate set by the IRS.

Volunteer labor cost estimates are used when a person is not being paid for their time by your organization or other project partners. There are two types of volunteer labor:

- ▶ **Skilled volunteer labor** is when a volunteer provides labor in a specialized field that they are qualified to provide. For instance, if an attorney spent 5 hours volunteering legal services, those hours would be valued at the regular legal fee rate. That legal fee rate would need to be supported. If that same attorney spent 5 hours providing trail maintenance, those hours would be considered general volunteer labor instead of skilled.
- ▶ **General volunteer labor** is when a person provides labor for standard, general work that they are not an expert in. FWP uses a set rate for this labor. Currently, that rate is \$25 per hour for calendar year 2022.

What to record when keeping track of match and expenses to be reimbursed?

- ▶ **Who:** Who did it, provided it, or paid for it, and on whose behalf?
- ▶ **What:** What was done, purchased, or donated?
- ▶ **Why:** Why is it being included? How did it benefit the project?
- ▶ **When:** When did the activity occur? When was the expense incurred and paid?
- ▶ **How Much?** What is the dollar value of the match and how did you arrive at the number?

How do I document match and expenses?

Match and reimbursed expenses require the same documentation. Examples of documentation, by category, are as follows:

- ▶ **Salary/Wages/Benefits:** Timesheets, pay stubs, cancelled checks, payroll records, or combined spending records. Costs for the project must be highlighted, identified, or tracked if an entire timesheet, paystub, or payroll record does not directly tie to the funded project. If match and reimbursed expenses are split on any record (for instance, if one employee's total timesheet was for the total project, and 90% was requested for reimbursement and 10% was provided as match), this split must be clearly identified.

- ▶ **General Expenses:** Invoices, receipts, check stubs, and financial reports.
- ▶ **Overhead, Facilities and Administration, Administrative, or Indirect Costs:** For non-federal awards (MTSGP), no supporting documentation is required.
- ▶ **Payments to Contractors:** Documentation that procurement processes have been followed. Invoices, receipts, contracts, check stubs, and financial reports.
- ▶ **Volunteer Time:** The Outdoor Recreation programs require specific logs to be completed by volunteers to track general volunteer labor. These logs may also be used to track skilled volunteer labor. Documentation to support the skilled volunteer labor rate will be required as well. These logs are available on the Outdoor Recreation programs webpages.
- ▶ **Donated Goods and Services:** Documentation of how you arrived at fair market value. Generally, this is in the form of a \$0 invoice from the donator of the good or service showing the value of the good or service.
- ▶ **Grooming:** Grooming match and reimbursed expenses must be captured through grooming logs. These grooming logs are available on our Outdoor Recreation program webpages.
 - **Note:** Grooming logs capture the activity of running the machines. The cost of running the machine is the grooming rate. If volunteers are running the groomers, their hours to do so may also be captured via the standard volunteer rate. Hybridized logs, where grooming and volunteer hours can be captured simultaneously, may be requested of, and approved by the program manager.
 - **Note:** Grooming logs and rates may *only* be used when the groomer machines are actively performing work. They may not be used when the groomer is being transported to a location, when work is being done on the groomer, etc. However, if a volunteer is transporting the groomer or conducting maintenance work, the volunteer's labor may be counted via the volunteer logs.

As you assemble your match and reimbursed expenses documentation, consider whether an independent person, such as an auditor or program manager, could look at your records and reconstruct what happened. Narratives *explaining* what happened and summarizing expenses and match are encouraged.

APPENDIX E: LIMITED SOLICITATION BID SHEET

LIMITED SOLICITATION SUMMARY SHEET

Recipient: _____

Agreement Number: _____
(Recipient Agreement #)

PRODUCT or WORK DESCRIPTION (if applicable):		BRAND/MODEL (if applicable):	
	VENDOR #1	VENDOR #2	VENDOR #3
VENDOR NAME CONTACT PERSON PHONE/FAX # DATE(s) CONTACTED*			
QUOTE PRICE			
AWARDED TO**			

*Three attempts to contact can be considered a quote price of “no response” and no additional attempts are required.

**Work should be awarded to the most cost-effective option that can provide the work/supplies required. Items such as shipping charges and travel distances should be included in determination of the most cost-effective option.

