



## **TOP Program Procedures and Evaluation Criteria with Application Attached**

The following procedures as shown on the Project Selection Procedure Flow Chart and the evaluation criteria as listed herein are hereby adopted:

### **Step One: Initial Proposal Screening:**

Any person or entity (including the Director of Parks and Recreation and the TOP Committee) interested in applying for funds under the TOP Program must first submit a proposal addressing the requirements of the Application (see Attachment A). All preliminary proposals for TOP Program funding shall first be evaluated by the TOP Committee against the Rough Cut Checklist (see below to determine whether the proposal aligns with the TOP Guiding Documents

The criteria for evaluating proposals during the Rough Cut step shall be whether the proposal aligns with:

1. **The Guiding Documents** (Parks, Recreation, Open Space and Trails Plan (PROST); the Community Plan; and Resolution 4386 (particularly the ballot language));
2. **Balance** (whether the proposal provides for and enhances the diversity of types of parks, trails and open spaces available in and around the City of Bozeman);
3. **Maintenance** (maintenance requirements or needs feasible – the long term physical and human resource maintenance responsibilities of the City and other partners; and
4. **Opportunity** (whether the proposal provides for a prudent long term investment for the City; whether the proposal provides for a feasible partnership opportunities; and whether the proposal represents an opportunity to leverage bond funds).

A proposal must receive at least five “yes” marks as approved by the TOP Committee on the Rough Cut Checklist (below) to move onto Step Two.

If a proposal does not meet the minimum criteria established during the Rough Cut review, the TOP Committee shall prepare a report to the City Commission. The Commission may request the TOP Committee continue to review the proposal beginning with Step Two, below. The City Manager shall prepare a brief report on each proposal for evaluation under this step.

## **Step Two: Presentations, Reviews, Field Trip, Etc.:**

If the proposal receives a favorable screening by the TOP Committee in Step One, above, the TOP Committee may determine to schedule a public hearing on the proposal and hear presentations from the applicant and applicable City staff. The TOP Committee may also make on-site visits as a committee and hold work sessions with or without expert assistance. The TOP Committee may hear on-call reports from City staff involved with the various types of trails, open space and parks (Parks and Recreation Director, Parks Superintendent, Parks Foreman, Trail Boss, etc...)

## **Step Three: Evaluation Matrices:**

All proposals meeting the standard of Step One and upon completion of Step Two will be evaluated by the TOP Committee based on the Community Benefit criteria. The Community Benefit criteria assess a proposal's contribution to the parks, trails and open space system. Proposals shall also be scored in this step pursuant to the appropriate Prevailing Characteristics matrix, which is specific to the type of proposal being evaluated (stream enhancement, athletic complex, trail, open space, or park).

To receive a favorable recommendation from the TOP Committee, a proposal must receive a minimum of 60% of the total possible points available as determined by the TOP Committee from the Community Benefit criteria and the applicable Prevailing Characteristic matrix. .

A proposal that by TOP Committee approval qualifies for consideration under more than one Prevailing Characteristic matrix may have additional points added to its score only from the scoring categories not represented in other qualifying matrices.

## **Step Four: Final Discussion and Consideration of Qualifying Projects**

The TOP Committee will finally evaluate the initial qualifying application based on overall merit regardless of a proposal's numeric score and determine its recommendation to the City Commission.

To that end, a quorum of the TOP Committee shall be present in order to make a final recommendation to the Commission and a majority of the full committee membership must vote to support a favorable recommendation on a proposal to the Commission.

The TOP Committee shall forward a report on all applications that it takes under consideration indicating whether the TOP Committee supports the proposal for funding or any other recommendation the TOP Committee determines appropriate. Those proposals that advance for

full consideration before the TOP Committee will cause to be generated a more detailed report to the Commission explaining the basis of upon which decisions were made.

If the decision is not unanimous, a minority report will be included.

**Step Five: Commission Review of Proposal and TOP Committee Recommendation:**

The Commission's review of a proposal and determination of whether to fund a proposal shall comply with the following:

1. The Commission shall conduct a public hearing, hear from the applicant, and take public comment;
2. The Commission shall consider the following in its determination whether to fund a proposal:
  - a. The proposal's fulfillment of the purposes of the TOP Program as stated in Resolution 4386;
  - b. The TOP Committee's recommendation on the proposal; and
  - c. Any other factors the Commission determines appropriate.

The Commission is not bound in its determination to award funding for a proposal by the TOP Committee's recommendation or the scoring criteria included herein.

The Commission shall approve funding by resolution.

# PROJECT SELECTION PROCEDURE FLOWCHART

## Step 1: Initial Application Run Through Rough Cut Checklist

*Did the proposal receive at least five yes checks on Rough Cut Check List?*

Yes                      No      ⇒    End of Consideration

(Written report to Commission)



## Step 2: Committee's Review and Consideration



## Step 3: Community Benefit Matrix



### Prevailing Characteristics Matrix

*Did the proposal rate 60% or higher on the qualifying Matrices?*

Yes                      No      ⇒    End of Consideration

(Written report to Commission)



## Step 4: Committee Discussion and Evaluation

*Did the proposal receive an affirmative vote from the majority of TOP?*

Yes                      No      ⇒    End of Consideration

(Written report to Commission)



Recommendations provided to City Commission for funding level and conditions.

# TOP ROUGH CUT MATRIX

**Project:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Reviewer:** \_\_\_\_\_

**Directions:** Answer each question yes or no, marking an X in the appropriate box. To proceed to the next level of review, the Committee must award the proposal an average score of at least 5 yeses, including a mandatory yes on question one of the Guiding Documents section.

## GUIDING DOCUMENTS

	Yes	No
*Resolution 4386: Project proposal aligns with at least one ballot language initiative (Parks, Natural Areas, Trails, Multi-Use Recreational Fields/Facilities, and/or Water Quality)?  *mandatory “yes”		
PROST Plan: Project is identified in PROST?		
Community Plan: Project aligns with Bozeman Community Plan?		

## BALANCE

	Yes	No
Project balances types of parks, trails and open space available in and around the City of Bozeman?		

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**MAINTENANCE**

Yes

No

Are maintenance requirements or needs feasible?		
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**OPPORTUNITY**

Yes

No

Proposal represents a prudent long-term investment for the City?		
Proposal suggests a feasible partnership opportunity?		
Proposal represents an opportunity to leverage bond funds?		

**Total Yes:** \_\_\_\_\_

## Community Benefit MATRIX

**Directions:** This matrix assesses projects contribution to the parks, trails and open space system. Rate the proposal from 0 to 5 on each criterion.

### CONTRIBUTION TO THE PARKS, TRAILS AND OPEN SPACE SYSTEM

<p><b>Variety:</b> Contributes to the variety of lands within the park, trail and open space system.</p>	<p>_____</p>
<p><b>Distribution:</b> Distributes the park, trail and open space system throughout and around the City of Bozeman planning area.</p>	<p>_____</p>
<p><b>Enhancement:</b> Integrates, and enhances existing and/or projected development.</p>	<p>_____</p>
<p><b>Balance:</b> Contributes to a comprehensive park, trail and open space system by adding to the balanced diversification and need for different types of space.</p>	<p>_____</p>
<p><b>Leverage:</b> Leverages and represents a good value for tax payer dollars to enhance the system.</p>	<p>_____</p>
<p><b>Connections:</b> Makes connections within a type of park, trail or open space, among different types of space, or between the system and adjacent lands with different uses.</p>	<p>_____</p>

Rating: \_\_\_\_\_%

## Prevailing Characteristics Matrix: Parks

**Directions:** Rate the proposal from 0 to 5 on each criterion. Enter this number in the first blank (rank) and multiply by the criteria's weight to achieve the score.

Criterion	Rate (weight x rank)
The area is identified in the PROST Plan as a location for a community or neighborhood park or the location can serve a large portion of a population in an area that has relatively low parkland level of service as identified in the PROST Plan.	$6 \times \underline{\quad} = \underline{\quad}$
The project has potential for outdoor recreation due to its physical attributes, including its size, shape, topography, location, and/or flora and fauna.	$5 \times \underline{\quad} = \underline{\quad}$
The proposed park is easily accessible and visible to the public (has adequate parking and is bordered by public streets and/or significant bike/ped trails).	$5 \times \underline{\quad} = \underline{\quad}$
The proposed park land possesses features of aesthetic value and/or significant historical value.	$4 \times \underline{\quad} = \underline{\quad}$
The proposed park land is offered at a fair price and has significant value as a park.	$4 \times \underline{\quad} = \underline{\quad}$

Rating: \_\_\_\_\_%



**Prevailing Characteristics Matrix: Natural Areas/ Open Space**

**Directions:** Rate the proposal from 0 to 5 on each criterion. Enter this number in the first blank (rank) and multiply by the criteria's weight to achieve the score.

Criterion	Rate (weight x rank)
<b><u>Primary Characteristics: Natural Values</u></b>	
The land includes a stream, watercourse, or wetland and is priced at a value consistent with its prevailing characteristics (i.e. wetlands and flood plains are not priced as development land)	5 x ____ = ____
The project area provides protection to natural resources and/or agricultural interests.	5 x ____ = ____
The land provides long-term protection of critical wildlife habitat.	4 x ____ = ____
The project protects areas of cultural, historical or archaeological significance.	4 x ____ = ____
The project area possesses a distinctive geological form contributing to the character of the Gallatin Valley.	4 x ____ = ____

<u><i>Secondary Characteristics: Human Use Values</i></u>	
The land is visually attractive or unique.	4 x _____ = _____
The project area is suitable for such non-intrusive, low-intensity recreation such as walking/hiking or nature study.	4 x _____ = _____
The property presents opportunities for environmental education.	3 x _____ = _____
The project property is accessible for appropriate public uses.	3 x _____ = _____

Rating: \_\_\_\_\_%

**Prevailing Characteristics Matrix: Stream Enhancement/Water Quality**

**Directions:** Rate the proposal from 0 to 5 on each criterion. Enter this number in the first blank (rank) and multiply by the criteria’s weight to achieve the score.

Criterion	Rate (weight x rank)
The land includes a stream, watercourse, or wetland and is priced at a value consistent with its innate characteristics (i.e. wetlands and flood plains are not priced as development land)	6 x ____ = ____
The project seeks to enhance the water quality for fish and wildlife.	5 x ____ = ____
The project seeks to restore a stream or wetland to a higher functioning condition.	5 x ____ = ____
The project seeks to increase or improve recreational opportunities in public waterways.	5 x ____ = ____

Rating: \_\_\_\_\_%

**Prevailing Characteristics Matrix: Multi-Use Recreational Fields & Facilities**

**Directions:** Rate the proposal from 0 to 5 on each criterion. Enter this number in the first blank (rank) and multiply by the criteria's weight to achieve the score.

Criterion	Rate (weight x rank)
The proposed property/design lends itself to hosting regional athletic tournaments/events.	6 x ____ = ____
New and existing infrastructure demands, including parking, water, sewer, and storm drainage, have been considered and found feasible.	5 x ____ = ____
Access to the proposed area is possible via major thoroughfare.	4 x ____ = ____
The project proposal adequately addresses short and long-term maintenance of the facility.	4 x ____ = ____
The proposed project and use is appropriate in scale for the area of Bozeman and mitigates impacts on surrounding land uses.	4 x ____ = ____

Rating: \_\_\_\_\_%

## Prevailing Characteristics Matrix: Trails

**Directions:** Rate the proposal from 0 to 5 on each criterion. Enter this number in the first blank (rank) and multiply by the criteria's weight to achieve the score.

Criterion	Rate (weight x rank)
The trail or connection is identified in the PROST or judged beneficial.	5 x ____ = ____
The trail would link important destinations or provide important access (physical, visual, or proximal) to valued community resources or destinations.	5 x ____ = ____
The trail would become a recreational and/or transportation complement to the Bozeman trail system.	4 x ____ = ____
The trail would provide the opportunity to more fully experience the aesthetic, cultural, historical and natural resource values of an area.	3 x ____ = ____
A trail would be constructed and maintained with minimal negative impacts to the human and natural environment.	3 x ____ = ____

Rating: \_\_\_\_\_%

**Attachment A:**

**Application for City of Bozeman**  
**Trails, Open Space and Parks Bond Funding**

Thank You for applying for Trails, Open Space and Parks Bond support. The Trails, Open Space and Parks Bond was passed by Bozeman voters on November 6, 2012. The exact ballot language and all evaluation criteria used in this process may be found on the City of Bozeman website at [www.bozeman.net](http://www.bozeman.net). **Please present proposals in a manner that is understandable to those that have no familiarity with the project.** We appreciate your desire to enhance Bozeman and its Trails, Open Space and Parks.

1. Please give a brief description of your project that includes location, budget, amount requested, and amount contributed from other sources.

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2. Briefly describe how the project creates or enhances one or more of the following:
  - a. Open Space/Natural Areas
  - b. Parks
  - c. Trails
  - d. Water Quality
  - e. Multi-Use Recreational Fields

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3. Has the exact site been identified? If so, please detail here.

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4. Briefly explain how the project creates long term value for the residents of Bozeman.

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5. Please list all groups/organizations involved or contributing to this project and what their short and long term commitments will be.

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6. Please describe the anticipated maintenance requirements for the site and who will be responsible for maintenance.

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7. Are you aware of any mitigation needs on any part of a proposed property? If so, please explain.

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8. Please attach any supporting documents, maps, pictures, etc...that may be useful in the initial evaluation of your proposal and provide ten (10) copies of your completed application and documents to:

**TOP Programs Manager**  
**415 N. Bozeman Ave.**  
**Bozeman, MT 59715**