

**CITY COUNCIL SPECIAL SESSION
CITY COUNCIL CONFERENCE ROOM
418 EAST SECOND STREET
MONDAY, JANUARY 5, 2026
5:00 PM**



- 1) Call to Order
- 2) Interviews
 - a) 5:00 pm – Ryan Walther – CAP
 - b) 5:15 pm – Keegan Siebenaler – CAP – Incumbent
 - c) 5:30 pm – Kurt Herzog – WLLP (via conference call)
 - d) 5:45 pm – Nina Heller – WLLP
 - e) 6:00 pm – John Flink - WLLP
- 3) Public Comment
- 4) Appointment
 - a) Climate Action Plan Committee – (2) Positions, (1) 2-year term, (1) complete term ending 12/31/2026 – (3) Applicants – Mayoral Appointment
 - b) Whitefish Lake and Lakeshore Protection Committee – (1) Position, 2-year term, member-at-large, Mayoral Appointment

**CITY COUNCIL WORK SESSION
CITY COUNCIL CONFERENCE ROOM
418 EAST SECOND STREET
MONDAY, JANUARY 5, 2026
6:15 PM**

To attend the meeting via Zoom and **provide live comment** attendees should go to the web link below. **Due to occasional technical difficulties, the most reliable way to participate is through in-person attendance. Electronic means are not guaranteed.**

Meeting Link: [Zoom Link](#) Meeting Number: **849 2808 8413** Password: **59937**

Raise your virtual hand to indicate you want to provide comment.

- We encourage individuals to provide written public comment; to the City Clerk, Michelle Howke at mhowke@cityofwhitefish.gov or deliver by **4:00 p.m. Monday, January 5, 2026**, to City Hall. Written comments should include name, address, should be short and concise, courteous, and polite. All written comments received by 4:00 p.m. will be provided to the City Council and appended to the packet following the meeting.
- Public comment by those attending the meeting "live" via Zoom or in-person will be limited to three minutes per individual.

- 5) Impact Fee Update with Tischler Bise
- 6) Public Comment
- 7) Direction to City Manager
- 8) Adjourn



PUBLIC NOTICE

VACANCIES ON CITY BOARDS/COMMITTEES

BOARD OF APPEALS –1 Opening (Term Not Designated) Reviews alternate construction methods and interprets the International Building Code. Applicants must have relevant experience or training in building construction. Meets as needed.

CLIMATE ACTION PLAN COMMITTEE – 2 Openings One 2-year term; one term ending 12/31/2026. Open to City residents or those with expertise in energy or climate issues. Meets in the afternoons on the 3rd Wednesday. ([WCC Title 2, Chapter 17](#))

LAKE & LAKESHORE PROTECTION COMMITTEE – 1 Opening (2 – Year Terms) One positions for City residents. Meets evening on the 2nd Wednesday. ([WCC Title 2, Chapter 16](#))

Interested citizens – Please submit a letter of interest to serve on the above committees to the Whitefish City Clerk’s Office at 418 E. 2nd St.; mail to P.O. Box 158, Whitefish, MT 59937, or email mhowke@cityofwhitefish.gov. Please include your name, mailing address, physical address, and phone number. Letters of interest will be accepted until the positions are filled. If you have any questions, please call Michelle Howke, City Clerk, at 863-2402 or visit the City’s website: www.cityofwhitefish.gov
THANK YOU FOR YOUR INTEREST

City Clerk's Office
Attn: Michelle Howke
City of Whitefish
418 E. 2nd Street
P.O. Box 158
Whitefish, MT 59937

Ryan E. Walther
[REDACTED] Birch Hill Drive
Whitefish, Montana
ryanwalther@gmail.com | [REDACTED]

Dear Members of the City Council,

I am writing to express my interest in serving on the City of Whitefish's Climate Action Plan Committee. I bring to the table 16 years of federal experience managing international grant and contract portfolios valued between \$150 million and \$350 million annually. The awards that made up these portfolios covered issues and sectors relevant to Whitefish's climate-related efforts, including governance, climate-sensitive agriculture, forest and fisheries management, conservation, and climate change-related health issues.

My role covered budgeting and fundraising; coordination with stakeholders within my agency, the State Department and other agencies, host country officials, fellow donor organizations, and civil society; monitoring, evaluation, and learning; communications; strategy and project design; and process management.

We have owned property in Whitefish for over a decade and this summer we moved here full-time. I am interested in helping the city effectively pursue climate change-related objectives, including those referenced and alluded to within the CAP. Balancing progress on these objectives with growth, city character and livability, and other issues must be managed in a transparent, judicious manner without posing excessive delays and barriers to progress.

Thank you for your consideration.

Best,
Ryan Walther

Michelle Howke

From: Keegan Siebenaler <keegsieb@gmail.com>
Sent: Wednesday, December 17, 2025 3:42 PM
To: Michelle Howke
Subject: Re: Climate Action Plan Term Limit

Follow Up Flag: Follow up
Flag Status: Flagged

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Michelle,

After not being appointed to the Planning Commission, I would like to reapply to one of the two vacant positions on the Climate Action Plan Commission. Let me know if you need a new letter of interest!

Best,
Keegan Siebenaler

On Oct 15, 2025 at 3:26:48 PM, Michelle Howke <mhowke@cityofwhitefish.gov> wrote:

Dear Keegan,

I hope this message finds you well. I'm writing to let you know that your term on the Climate Action Plan Committee will expire on December 31, 2025.

As part of our standard process, the City will be advertising this position along with other board and committee roles that are set to expire at the end of the year. If you wish to be considered for another term, please submit your letter of application by **October 24, 2025**. This date also serves as the deadline to notify us of your intent to reapply.

Interviews with the Council will be scheduled throughout November and December, as time permits. If you choose to reapply, I will follow up with you to arrange a specific interview time.

If you do not plan to serve another term, kindly let me know at your earliest convenience.

For your reference, I've attached a copy of the Public Notice for Vacant Board and Committees.

Thank you again for your valuable service to the Whitefish community.

Michelle Howke

Administrative Services Director/City Clerk

PO Box 158

Whitefish, MT 59937

(406)863-2402

mhowke@cityofwhitefish.gov

Please note, our website has changed to www.cityofwhitefish.gov. Please update if you have the website included in your bookmarks.

CHAPTER 17

WHITEFISH CLIMATE ACTION STANDING COMMITTEE

SECTION:

2-17-1: Standing Committee Established

2-17-2: Purpose, Powers, And Duties

2-17-3: Membership

2-17-4: Organization

2-17-5: Meetings, Rules And Regulations

2-17-6: Staff Supervision

2-17-7: Expenditures

2-17-1: STANDING COMMITTEE ESTABLISHED:

There is hereby established a Whitefish Climate Action Standing Committee, hereinafter "committee". (Ord. 18-32, 10-1-2018)

2-17-2: PURPOSE, POWERS, AND DUTIES:

The purpose and duties of the committee are to assist in the implementation of the Whitefish Climate Action Plan by establishing a working timeline for implementation, recommending actions and budget priorities to the City Council or City management, tracking progress towards the plan's goals, updating the greenhouse gas inventory and updating the plan. Nothing in this chapter shall be construed to empower the committee to authorize or prohibit the use of public funds. (Ord. 18-32, 10-1-2018)

2-17-3: MEMBERSHIP:

A. Appointment; Compensation: The committee shall have nine (9) members. Members of the Committee shall be appointed by the Mayor with the consent of the City Council. Five (5) members shall be City residents or have technical expertise in the areas of energy use, energy conservation, and/or climate change. One (1) member shall be a City Councilor. Three (3) members shall be City staff members, appointed by the Directors of Public Works, Planning and Parks and Recreation. The city clerk shall make appropriate notation of a member's representation category on the official committee roster. Committee members shall receive no compensation.

B. Terms; Positions: Committee terms shall be for two (2) years. There are hereby created positions numbered 1 through 9 inclusive of the members of the committee. The initial term of the committee members shall be staggered, with positions 1 through 5 serving two (2) year terms, and positions 6 through 9 serving one-year terms. The initial term for members serving pursuant to this chapter shall begin upon appointment and terminate on the date specified below for each position:

Position Number	Representation Category	Initial Expiration Date
1	Member at large	December 31, 2020

2	City Councilor	December 31, 2020
3	Member at large	December 31, 2020
4	City staff member	December 31, 2020
5	City staff member	December 31, 2020
6	Member at large	December 31, 2019
7	Member at large	December 31, 2019
8	City staff member	December 31, 2019
9	Member at large	December 31, 2019

C. Removal Of Member: A member may be removed from the committee by majority vote of the City Council for cause upon written charges and after a public hearing. Willful disregard of this chapter and the rules of procedures of the committee, or absences from three (3) consecutive meetings, including regular and special meetings, or absences from more than fifty percent (50%) of such meetings held during the calendar year shall constitute cause for removal. Circumstances of the absences shall be considered by the City Council prior to removal. Any person who knows in advance of his or her inability to attend a specific meeting shall notify the Chairperson or Secretary of the committee at least twenty four (24) hours prior to any scheduled meeting.

D. Vacancy: Pursuant to subsections A and B of this section, any vacancy on the committee shall be filled by the City Council acting in a regular or special session for the unexpired term of the position wherein the vacancy exists. The City Council may appoint members of the City Council to temporarily fill vacant positions on the committee. (Ord. 18-32, 10-1-2018; amd. Ord. 18-36, 12-3-2018; Ord. 22-01, 2-7-2022)

2-17-4: ORGANIZATION:

At the committee's first meeting and the first meeting of each calendar year, the committee shall elect a Chairperson, Vice Chairperson and Secretary. If a vacancy occurs in an officer's position, the committee shall elect a member of the committee to fill the vacancy at the next meeting. Upon the absence of the Chairperson, the Vice Chairperson shall serve as Chairperson Pro Tem. If the Secretary is absent from a specific meeting, the attending members shall elect a Secretary Pro Tem for the meeting. The Secretary need not be a member of the committee and shall keep an accurate record of all committee proceedings. (Ord. 18-32, 10-1-2018)

2-17-5: MEETINGS, RULES AND REGULATIONS:

The majority of the committee shall constitute a quorum. Not less than a quorum of the committee may transact any business before the committee. The concurring vote of a simple majority of members present shall be necessary to decide any question or matter before the committee. The committee shall adopt rules of procedure for the conduct of meetings consistent with statutes, the City Charter, ordinances and resolutions. The committee shall meet at least annually, and at such other times as the committee may determine. All meetings shall be open to the public. (Ord. 18-32, 10-1-2018)

2-17-6: STAFF SUPERVISION:

The committee shall have no supervisory control and shall not direct City staff in the performance of their official duties. (Ord. 18-32, 10-1-2018)

2-17-7: EXPENDITURES:

The committee shall not have authority to make any expenditures on behalf of the City or disburse any funds provided by the City or to obligate the City for any funds. (Ord. 18-32, 10-1-2018)

Michelle Howke

From: Kurt Herzog <teamherzog@msn.com>
Sent: Tuesday, December 23, 2025 10:52 AM
To: Michelle Howke
Subject: Whitefish Lakeshore Protection Committee Participation

You don't often get email from teamherzog@msn.com. [Learn why this is important](#)

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Michell,

John Flink, Bay Point Board Member, reached out to as Nancy Schuber has stepped down from the Lakeshore Committee.

As a open water swimmer, boater (Home owner at Bay Point Country Homes)and advocate for protecting Whitefish Lake I would be more than happy to serve on your committee.

My wife's family is originally from Anaconda and our 36 year son graduated from University of Montana and currently resides in Helena.

We built our home in Bay Point 5 years ago and are fulltime Montana residence.

Please feel free to reach out to me if you would like additional information and thank you for your consideration.

Merry Christmas

Best regards,

Kurt

 / teamherzog@msn.com

Kurt & Anne Herzog
 Marina Crest Lane
Whitefish MT 59937

Michelle Howke

From: Nina Heller <nina@rowanhealth.com>
Sent: Tuesday, December 16, 2025 2:18 PM
To: Michelle Howke
Subject: FW: Letter of Interest for Lake Shore Protection Committee

You don't often get email from nina@rowanhealth.com. [Learn why this is important](#)

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My apologies, I accidentally hit the send button before I actually drafted the letter. I hope a sense of humor is welcomed by the committee.

Dear Members of the Lake and Lakeshore Protection Committee,

Thank you for continuing to post openings on various City Boards and Committees.

I am writing to express my interest in participating on the City's Lake and Lakeshore Protection Committee.

I have come to deeply appreciate the lake not only for its natural beauty, but also for the role it plays in our community's environmental health, recreation, and quality of life. As our population increases and development continues, I believe it is increasingly important to balance growth with responsible protection of this vital resource.

I am particularly interested in learning how I can best support efforts to protect water quality, shoreline integrity, and long-term sustainability. I value collaborative, science-informed decision-making and would welcome the opportunity to work with fellow committee members, city staff, and community stakeholders to help ensure the lake remains healthy and accessible for future generations.

My husband and I moved to Whitefish over five years ago. We love living here and having our 4 adult kids visit. We enjoy the mountains, the lake, the active lifestyle, and the amazing people that have become lifelong friends. I have had a health and wellness consulting business for 32 years. I work from home and enjoy the view of the lake throughout the day.

I have been on a member of the Cystic Fibrosis Board for many years. I have participated in community committees in Austin, Texas for area springs and lakes. I have participated in HOA boards for over 20 years in 4 different states. I am currently on 2 Whitefish HOA boards.

I am not sure what time you meet on Wednesday, but I want to make you aware I am participating in the Women's Ski Clinic this winter on Wednesday mornings in case that presents a conflict. Let me know if you have any questions. Thank you for your consideration.

NINA ROWAN HELLER

T: [REDACTED]
[REDACTED]

E: nina@rowanhealth.com



December 12, 2025

John Flink
[REDACTED] Bay Point Drive
Whitefish, MT 59937
john@johnflink.com
[REDACTED]

Letter of Interest – Whitefish Lakeshore Protection Committee

Dear Members of the Selection Committee,

I am writing to express my interest in serving on the Whitefish Lakeshore Protection Committee.

My name is John Flink, and I was born and raised in western Montana. I live at 114 Bay Point Drive in Whitefish. I am married, have four children, and two grandchildren. Our youngest attends Whitefish High School. After starting, owning, and operating businesses in western Montana since 1989, I retired in 2024.

Whitefish Lake is one of the community’s most valuable natural resources, and its long-term health depends on the thoughtful, consistent application of the Whitefish Lakeshore Regulations. I am strongly committed to protecting the lake’s water quality, shoreline stability, and ecological integrity, while also recognizing the importance of responsible recreation and waterfront access that complies with established standards.

I believe the committee plays a critical role in balancing these interests. Clear regulations provide property owners with predictability and help ensure that individual projects do not compromise the lake. My goal is to support decisions that are grounded in the intent of the regulations, protect the public interest, and maintain the character and health of Whitefish Lake for future generations.

I bring a practical, detail-oriented approach, a respect for the regulatory framework, and a willingness to listen carefully to applicants, staff, and fellow committee members. I value collaborative discussion and reasoned decision-making, particularly when reviewing variance requests or complex shoreline proposals.

Thank you for considering my application. I would welcome the opportunity to contribute to the committee’s work and to the continued stewardship of Whitefish Lake.

Sincerely,



John W. Flink

CHAPTER 16

WHITEFISH LAKE AND LAKESHORE PROTECTION COMMITTEE

SECTION:

2-16-1: Standing Committee Established

2-16-2: Purpose, Powers And Duties

2-16-3: Membership

2-16-4: Terms; Positions

2-16-5: Removal Of Member

2-16-6: Vacancy

2-16-7: Organization

2-16-8: Meetings; Rules And Regulations

2-16-9: Expenditure Authorized

2-16-1: STANDING COMMITTEE ESTABLISHED:

Pursuant to and under the provisions of Montana Code Annotated sections 75-7-201 et seq., the city council of the city of Whitefish does create and establish the Whitefish Lake and lakeshore protection committee as a standing committee of the city, consistent with state law. (Ord. 15-10, 6-1-2015)

2-16-2: PURPOSE, POWERS AND DUTIES:

By this chapter, the city council of the city of Whitefish grants and delegates to the Whitefish Lake and lakeshore protection committee all of the rights, privileges, powers, duties, and responsibilities thereto appertaining. The Whitefish Lake and lakeshore protection committee shall have such jurisdiction as provided by state law. (Ord. 15-10, 6-1-2015)

2-16-3: MEMBERSHIP:

The Whitefish Lake and lakeshore protection committee shall consist of seven (7) members, to be appointed as follows:

A. The Whitefish city council shall appoint a total of six (6) members, two (2) members shall reside within the corporate limits of the city of Whitefish, two (2) shall be lakefront property owners and residents within the corporate limits of the city of Whitefish, and two (2) members shall reside outside the corporate limits of the city of Whitefish and shall be lakefront property owners.

B. The seventh member shall be appointed by the Whitefish planning board, reside within the corporate limits of the city of Whitefish, and be a member of the planning board. He/she shall serve for a two (2) year term unless he/she requests removal or is removed by a majority vote of the planning board.

Committee members shall receive no compensation. (Ord. 15-10, 6-1-2015)

2-16-4: TERMS; POSITIONS:

Committee terms shall be two (2) years. There are hereby created positions numbered 1 through 7 inclusive of the members of the Whitefish Lake and lakeshore protection committee. Members serving on the effective date of this chapter shall be assigned to positions that correspond with the following expiration dates:

Position Number	Term Expiration Date
1	December 31, 2017
2	December 31, 2017
3	December 31, 2017
4	December 31, 2017
5	December 31, 2018
6	December 31, 2018
7	December 31, 2018

As each of the above listed expiration dates has passed, a member appointed to the position shall serve for a two (2) year term. Terms shall begin on January 1 following the initial expiration of the preceding term. At the discretion of the city council, members may be appointed for more than one term. (Ord. 15-10, 6-1-2015)

2-16-5: REMOVAL OF MEMBER:

A member of the Whitefish Lake and lakeshore protection committee may be removed from the committee by majority vote of the city council for cause upon written charges and after a public hearing. Wilful disregard of state statutes, city ordinances and the rules of procedure of the committee, or absences from three (3) consecutive meetings, including regular and special work sessions, or absences from more than fifty percent (50%) of such meetings held during the calendar year shall constitute cause for removal. Circumstances of the absences shall be considered by the city council prior to removal. Any person who knows in advance of his or her inability to attend a specific meeting shall notify the chair or city staff member assigned to the Whitefish Lake and lakeshore protection committee at least twenty four (24) hours prior to any scheduled meeting. (Ord. 15-10, 6-1-2015)

2-16-6: VACANCY:

Pursuant to sections 2-16-3 and 2-16-4 of this chapter, any vacancy on the Whitefish Lake and lakeshore protection committee shall be filled by the city council acting in a regular or special session for the unexpired term of the position wherein the vacancy exists. The city council may appoint members of the city council to temporarily fill vacant positions on the Whitefish Lake and lakeshore protection committee. (Ord. 15-10, 6-1-2015)

2-16-7: ORGANIZATION:

The Whitefish Lake and lakeshore protection committee, at its first meeting after January 1 of each year, shall elect a chair and vice chair for the next twelve (12) month period. Upon the absence of the chair, the vice chair shall serve as chair pro tem. If a vacancy occurs in the chair or vice chair positions, the committee shall elect a member to fill the vacancy at the next meeting. (Ord. 15-10, 6-1-2015)

2-16-8: MEETINGS; RULES AND REGULATIONS:

Four (4) members of the Whitefish Lake and lakeshore protection committee constitute a quorum to conduct business. Not less than a quorum of the committee may transact any business or conduct any proceedings before the committee. The concurring vote of four (4) members of the committee shall be necessary to decide any question or matter before the committee, except a motion for a continuance and motions to elect a chair and vice chair may be decided by a simple majority vote of the committee. The committee shall adopt rules of procedure for the conduct of meetings consistent with statutes, the city charter, ordinances and resolutions. Meetings of the committee shall be held at the call of the chair and at such other times as the committee may determine. All meetings shall be open to the public. (Ord. 15-10, 6-1-2015)

2-16-9: EXPENDITURE AUTHORIZED:

The Whitefish Lake and lakeshore protection committee shall not have authority to make any expenditures on behalf of the city or disburse any funds provided by the city or to obligate the city for any funds except as has been included in the city budget and after the city council shall have authorized the expenditure by resolution, which resolution shall provide the administrative method by which funds shall be drawn and expended. (Ord. 15-10, 6-1-2015)



Service Area Report and Impact Fee Study

Prepared for:
Whitefish, Montana

December 17, 2025



4701 Sangamore Road
Suite S240
Bethesda, MD
(301) 320-6900
www.TischlerBise.com

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EXECUTIVE SUMMARY

The City of Whitefish, Montana, contracted with TischlerBise to document land use assumptions, prepare the Service Area Report, and update its water and wastewater impact fees within the applicable service areas pursuant to Montana Code 7-6-16 (hereafter referred to as the “Enabling Legislation”). Governmental entities in Montana may assess impact fees to offset infrastructure costs to the governmental entity for public facilities needed to serve future development. For each public facility for which an impact fee is imposed, the governmental entity shall prepare and approve a service area report. The impact fees must (1) be reasonably related to and reasonably attributable to the development's share of the cost of infrastructure improvements made necessary by the new development and (2) may not exceed a proportionate share of the costs incurred or to be incurred by the governmental entity in accommodating the development.

Impact fees are one-time payments used to construct system improvements needed to accommodate future development, and the fee represents future development's proportionate share of infrastructure costs. Impact fees may be used for infrastructure improvements or debt service for growth-related infrastructure. In contrast to general taxes, impact fees may not be used for operations, maintenance, replacement, or correcting existing deficiencies.

This update of Whitefish's Service Area Report and associated update to its impact fees includes the following public facilities:

1. Water
2. Wastewater

Montana Impact Fee Enabling Legislation

The Enabling Legislation governs how impact fees are calculated for governmental entities in Montana. In 2025, a recent Montana State Senate Bill (SB 133) revised the Enabling Legislation by limiting the public facilities that are eligible for impact fee funding and the fee to administrate an impact fee program. Below summaries the State Statutes with the recent revisions.

Public Facilities

Under the requirements of the Enabling Legislation, impact fees may only be used for construction, acquisition, or expansion of public facilities made necessary by new development. “Public Facilities” means any of the following categories of capital improvements with a useful life of 10 years or more that increase or improve the service capacity of a public facility (§7-6-1601(7)):

1. a water supply production, treatment, storage, or distribution facility;
2. a wastewater collection, treatment, or disposal facility;
3. a transportation facility, including roads, streets, bridges, rights-of-way, and traffic signals;
4. a storm water collection, retention, detention, treatment, or disposal facility or a flood control facility;
5. a law enforcement, emergency medical rescue, 9-1-1 system, emergency management, or fire protection facility.

Also, §7-6-1601(5a) states that "impact fee" means any charge imposed on development by a governmental entity as part of the development approval process to fund the additional service capacity required by the development from which it is collected.

Service Area Report

For each public facility for which an impact fee is imposed, the governmental entity shall prepare and approve a service area report. The service area report is a written analysis that must:

1. describe existing conditions of the facility;
2. establish level-of-service standards;
3. forecast future additional needs for service for a defined period of time;
4. identify capital improvements necessary to meet future needs for service;
5. identify those capital improvements needed for continued operation and maintenance of the facility;
6. make a determination as to whether one service area or more than one service area is necessary to establish a correlation between impact fees and benefits;
7. make a determination as to whether one service area or more than one service area for transportation facilities is needed to establish a correlation between impact fees and benefits;
8. establish the methodology and time period over which the governmental entity will assign the proportionate share of capital costs for expansion of the facility to provide service to new development within each service area;
9. establish the methodology that the governmental entity will use to exclude operations and maintenance costs and correction of existing deficiencies from the impact fee;
10. establish the amount of the impact fee that will be imposed for each unit of increased service demand; and
11. have a component of the budget of the governmental entity that:
 - a. schedules construction of public facility capital improvements to serve projected growth;
 - b. projects costs of the capital improvements;
 - c. allocates collected impact fees for construction of the capital improvements; and
 - d. covers at least a 5-year period and is reviewed and updated at least every 5 years.

Legal Framework

Both state and federal courts have recognized the imposition of impact fees as a legitimate form of land use regulation, provided the fees meet standards intended to protect against regulatory takings. Land use regulations, development exactions, and impact fees are subject to the Fifth Amendment prohibition on taking of private property for public use without just compensation. To comply with the Fifth Amendment, development regulations must be shown to substantially advance a legitimate governmental interest. In the case of impact fees, that interest is in the protection of public health, safety, and welfare by ensuring development is not detrimental to the quality of essential public services. The means to this end are also important, requiring both procedural and substantive due process. The process followed to receive

community input (i.e., stakeholder meetings, work sessions, and public hearings) provides opportunities for comments and refinements to the impact fees.

There are three reasonable relationship requirements for impact fees that are closely related to “rational nexus” or “reasonable relationship” requirements enunciated by a number of state courts. Although the term “dual rational nexus” is often used to characterize the standard by which courts evaluate the validity of impact fees under the U.S. Constitution, we prefer a more rigorous formulation that recognizes three elements: “need,” “benefit,” and “proportionality.” The dual rational nexus test explicitly addresses only the first two, although proportionality is reasonably implied, and was specifically mentioned by the U.S. Supreme Court in the Dolan case (Dolan v. City of Tigard, OR, 1994). Individual elements of the nexus standard are discussed further in the following paragraphs.

All new development in a community creates additional demands on some, or all, public facilities provided by local government. If the capacity of facilities is not increased to satisfy that additional demand, the quality or availability of public services for the entire community will deteriorate. Impact fees may be used to recover the cost of development-related facilities, but only to the extent that the need for facilities is a consequence of development that is subject to the fees. The Nollan decision reinforced the principle that development exactions may be used only to mitigate conditions created by the developments upon which they are imposed. That principle clearly applies to impact fees. In this study, the impact of development on infrastructure needs is analyzed in terms of quantifiable relationships between various types of development and the demand for specific capital facilities, based on applicable level-of-service standards.

The requirement that exactions be proportional to the impacts of development was clearly stated by the U.S. Supreme Court in the Dolan case and is logically necessary to establish a proper nexus. Proportionality is established through the procedures used to identify development-related facility costs, and in the methods used to calculate impact fees for various types of facilities and categories of development. The demand for capital facilities is measured in terms of relevant and measurable attributes of development (e.g., a typical housing unit’s average weekday vehicle trips).

A sufficient benefit relationship requires that impact fee revenues be segregated from other funds and expended only on the facilities for which the fees were charged. Impact fees must be expended in a timely manner and the facilities funded by the fees must serve the development paying the fees. However, nothing in the U.S. Constitution or the state enabling legislation requires that facilities funded with fee revenues be available exclusively to development paying the fees. In other words, benefit may extend to a general area including multiple real estate developments. Procedures for the earmarking and expenditure of fee revenues are discussed near the end of this study. All of these procedural as well as substantive issues are intended to ensure that new development benefits from the impact fees they are required to pay. The authority and procedures to implement impact fees is separate from and complementary to the authority to require improvements as part of subdivision or zoning review.

As documented in this report, the City of Whitefish has complied with applicable legal precedents. Impact fees are proportionate and reasonably related to the capital improvement demands of new development. Specific costs have been identified using local data and current dollars. With input from City staff,

TischlerBise identified service demand indicators for each type of infrastructure and calculated proportionate share factors to allocate costs by type of development. This report documents the formulas and input variables used to calculate the impact fees for each type of public facility. Impact fee methodologies also identify the extent to which new development is entitled to various types of credits to avoid potential double payment of growth-related capital costs.

Methodology

Impact fees for public facilities made necessary by new development must be based on the same level of service provided to existing development in the service area. There are three basic methodologies used to calculate impact fees. They examine the past, present, and future status of infrastructure. The objective of evaluating these different methodologies is to determine the best measure of the demand created by new development for additional infrastructure capacity. Each method has advantages and disadvantages in a particular situation and can be used simultaneously for different cost components.

Reduced to its simplest terms, the process of calculating impact fees involves two main steps: (1) determining the cost of growth-related capital improvements and (2) allocating those costs equitably to various types of development. In practice, though, the calculation of impact fees can become quite complicated because of the many variables involved in defining the relationship between development and the need for facilities within the designated service area. The following paragraphs discuss basic methods for calculating impact fees and how those methods can be applied.

- **Cost Recovery** (past improvements) - The rationale for recoupment, often called cost recovery, is that future development is paying for its share of the useful life and remaining capacity of facilities already built, or land already purchased, from which future development will benefit. This methodology is often used for utility systems that must provide adequate capacity before new development can take place.
- **Incremental Expansion** (concurrent improvements) - The incremental expansion methodology documents current level-of-service standards for each type of public facility, using both quantitative and qualitative measures. This approach assumes there are no existing infrastructure deficiencies or surplus infrastructure capacity. Future development is only paying its proportionate share for growth-related infrastructure. Revenue will be used to expand or provide additional facilities, as needed, to accommodate future development. An incremental expansion methodology is best suited for public facilities that will be expanded in regular increments to keep pace with development.
- **Plan-Based** (future improvements) - The plan-based methodology allocates costs for a specified set of improvements to a specified amount of development. Improvements are typically identified in a long-range facility plan and development potential is identified by a land use plan. There are two basic options for determining the cost per service demand unit: (1) total cost of a public facility can be divided by total service demand units (average cost), or (2) the growth-share of the public facility cost can be divided by the net increase in service demand units over the planning timeframe (marginal cost).

Conceptual Impact Fee Calculation

In contrast to project-level improvements, impact fees fund growth-related infrastructure that will benefit multiple development projects, or the entire service area (usually referred to as system improvements). The first step is to determine an appropriate service demand indicator for the particular type of infrastructure. The service demand indicator measures the number of service units for each unit of development. For example, an appropriate indicator of the demand for parks is population growth and the increase in population can be estimated from the average number of persons per housing unit. The second step in the impact fee formula is to determine infrastructure improvement units per service demand unit, typically called level-of-service (LOS) standards. In keeping with the park example, a common LOS standard is improved park acres per thousand people. The third step in the impact fee formula is the cost of various infrastructure units. To complete the park example, this part of the formula would establish a cost per acre for land acquisition and/or park improvements.

Evaluation of Credits

A consideration of credits is integral to the development of a legally defensible impact fee. There are two types of credits that should be addressed in impact fee studies and ordinances. The first is a revenue credit due to possible double payment situations, which could occur when other revenues may contribute to the capital costs of infrastructure covered by the impact fee. This type of credit is integrated into the fee calculation, thus reducing the fee amount.

The second type of credit is a site-specific credit for system improvements that have been included in the impact fee calculations. Policies and procedures related to site-specific credits for system improvements should be addressed in the ordinance that establishes the impact fees. However, the general concept is that developers may be eligible for site-specific credits only if they provide system improvements that have been included in the impact fee calculations. Project improvements normally required as part of the development approval process are not eligible for credits against impact fees. Site-specific credits are addressed in the administration and implementation of the development fee program.

Below, Figure 1 summarizes service areas, methodologies, and infrastructure cost components for each public facility.

Figure 1. Impact Fee Service Areas, Methodologies, and Cost Allocation

Fee Category	Service Area	Cost Recovery	Incremental Expansion	Plan-Based	Cost Allocation
Water	Citywide	Plant Facility	-	Storage, Distribution	Capacity by Meter Size
Wastewater	Citywide	Plant Facility	-	-	Capacity by Meter Size

Maximum Supportable Impact Fees

Figure 2 provides a schedule of the maximum supportable water and wastewater impact fees are based on the development’s meter size. The City may adopt fees that are less than the amounts shown.

However, a reduction in impact fee revenue will necessitate an increase in other revenues, a decrease in planned capital expenditures, and/or a decrease in levels of service.

Figure 2. Maximum Supportable Impact Fee Schedule

Meter Size (inches)	Water	WW	Maximum Supportable Fee	Current Fee	Increase/ (Decrease)
3/4	\$3,319	\$1,359	\$4,678	\$7,944	(\$3,266)
1	\$5,543	\$2,270	\$7,813	\$13,266	(\$5,453)
1 1/2	\$11,052	\$4,525	\$15,577	\$26,454	(\$10,877)
2	\$17,690	\$7,243	\$24,933	\$42,342	(\$17,409)
3	\$33,190	\$13,590	\$46,780	\$79,440	(\$32,660)
4	\$55,328	\$22,655	\$77,983	\$132,426	(\$54,443)
6	\$110,622	\$45,295	\$155,917	\$264,774	(\$108,857)

WATER SERVICE AREA REPORT

The Water Service Area Report uses a hybrid of cost recovery and plan-based approaches by comparing the cost of growth-related projects to the gallons added to the water system network. The analysis includes growth-related storage (plan-based), distribution (plan-based), and water treatment plant (cost recovery) projects. Water demand flows through these infrastructure components at separate times to deliver the water to the user, thus, the components are examined separately. The fee calculation uses previously constructed and future infrastructure projects and capacity added by the projects (in gallons) to determine the average construction cost per gallon to the City of Whitefish to expand that type of infrastructure. The average cost per gallon is then multiplied by the water demand (in gallons) by water meter size to find the maximum supportable impact fee.

Service Area

The City of Whitefish’s water infrastructure functions as an integrated network. As a result, the service area for the Water Service Area Report is citywide.

Cost Allocation

Costs and resulting impact fees are based on the gallons and water meter size of the development. A ¾-inch water meter is set to one Equivalent Dwelling Unit (EDU) and capacity ratios are applied to larger meters.

Service Demand Units

TischlerBise recommends using the American Water Works Association (AWWA) flow capacities by meter size to determine the demand from development. Figure 3 lists the capacities and weighting factors from AWWA.

Figure 3. Capacity Factors by Meter Size

Meter Size (inches)	AWWA Capacity (gal) [1]	Weighting Factor
3/4	30	1.00
1	50	1.67
1 1/2	100	3.33
2	160	5.33
3	300	10.00
4	500	16.67
6	1,000	33.33

[1] American Water Works Association

A service unit is a standardized measure of demand. The service unit for the water impact fees is an Equivalent Dwelling Unit (EDU). The standard EDU represents the demand from a single family unit with a ¾-inch water meter. The following section details the calculations to estimate EDU daily water use during peak month. For water service, the level of service is the amount of capacity (gallons) allocable to an EDU. The level of service generally represents the amount of capacity attributable to an EDU.

Additionally, water infrastructure is constructed to accommodate peak usage demand and Figure 4 lists the 2024 residential water usage by month. Residential usage is analyzed since the vast majority of residential accounts use a ¾ inch meter or one EDU. During the August billing cycle in 2024, there were 3,556 residential accounts which used a peak of 23.7 million gallons. This results in a daily average of 215 gallons per EDU during peak time. At the end of the chapter, this factor is multiplied by the net capital cost per gallon to find the impact fee per EDU.

At the bottom of Figure 4 the 2024 water use (215 gallons per day) is compared to the average found in the previous water impact fee study (281 gallons per day). In the past two years, water consumption per EDU has decreased by 23 percent. The decrease in water use is attributed to high household occupancy rates in 2022, irrigation use related to the weather, and a proactive community conservation effort.

Figure 4. Peak Water Usage

Water Usage (2024)	Residential Gallons	Residential Accounts	Monthly Average (gal)	Daily Average (gal)
January	9,956,070	3,528	2,822	91
February	10,683,340	3,530	3,026	104
March	7,841,530	3,539	2,216	71
April	8,752,120	3,544	2,470	82
May	8,719,640	3,548	2,458	79
June	14,016,230	3,557	3,940	131
July	18,919,460	3,557	5,319	172
August	23,723,280	3,556	6,671	215
September	17,917,520	3,560	5,033	168
October	10,756,540	3,573	3,011	97
November	8,384,490	3,569	2,349	78
December	8,353,270	3,570	2,340	75

Source: City of Whitefish Utility Billing Department

EDU Annual Daily Water Use (gals/day)	114
EDU Peak Day Water Use (gals/day)	215
2024 Peak Use (gals/day)	215
2022 Peak Use (gals/day)	281
Decrease in Water Use	23%

Water Consumption Projection

Figure 5 illustrates the projected increase in water consumption in Whitefish. Based on an AE2S long-range planning effort, there is a 1.5 percent annual growth rate in water consumption through 2045. This annual growth rate is applied to the 10-year growth assumptions. As a result, the peak day water use increases from 1.35 million gallons to 1.56 million gallons. This is a growth-related increase of 216,000 gallons per day, or a 16 percent increase from the base year.

Figure 5. 10-Year Water Consumption Projection

Whitefish, MT	2025 Base Year	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	10-Year Increase
Avg Daily Water Use (gals)	836,834	849,387	862,128	875,060	888,186	901,508	915,031	928,756	942,688	956,828	971,180	134,346
Peak Daily Water Use (gals)	1,346,793	1,366,995	1,387,500	1,408,313	1,429,437	1,450,879	1,472,642	1,494,732	1,517,153	1,539,910	1,563,009	216,215

Source: AE2S long-range planning effort (2025) projects 1.5 percent annual growth rate through 2045

Growth-Related Water Capital Expansion Projects and Cost Analysis

The following section details the calculations to determine the capital cost per gallon to expand water infrastructure by type.

Storage Projects

Listed in Figure 6 there is one water storage project in the City’s Capital Improvement Plan (CIP) that is planned for impact fee funding. Importantly, a portion of the project addresses current demand, so only a portion is impact fee eligible. Based on an engineering study conducted by AE2S there is a current water storage need of 540,000 gallons per day and the south water storage project is adding 1,000,000 gallons per day. Thus, 46 percent of the project is considered impact fee eligible (460,000 gallons / 1,000,000 gallons = 46 percent).

A recent update to the cost estimate found the project to be \$20.9 million, or \$9.6 million growth-related cost (46 percent). Furthermore, the City’s CIP scheduled cash reserves and existing impact fee fund balance for a portion of the project. Shown in Figure 6, the cash reserves are attributed to the non-growth cost and the impact fee fund balance is attributed to the growth cost. As a result, there is a remaining growth cost of \$6.6 million. The remaining cost of the project will be funded through future debt issued by the City. To ensure there is no double payment for growth-related infrastructure expansion a credit is included in the analysis in the following section to account for future payments on the issued debt.

Shown at the bottom of the figure, the remaining growth cost is compared to the growth-related increase in gallons per day capacity to find the water storage growth-related capital cost per gallon of \$14.35. ($\$6,598,987 / 460,000 \text{ gallons per day} = \$14.35 \text{ per gallon per day}$).

Figure 6. Growth-Related Water Storage Projects Cost Analysis

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Storage					
South Water Storage & Production	Additional storage south of HWY 40 including tank facility, transmission mains, and booster pump	\$20,906,000	46%	\$9,616,760	\$11,289,240
				Cash Reserves [2]	\$5,982,227
				Impact Fee Fund Balance [3]	\$3,017,773
				Remaining Funding Need (Growth vs Non-Growth)	\$6,598,987 \$5,307,013

[1] There is a current deficit of 0.54MG. Thus, 0.46 is the added capacity, growth's share. *Preliminary Engineering Report, AE2S, May 2025*

[2] Cash reserves funding towards non-growth cost

[3] Impact fee fund balance funding towards growth's cost

Cost Analysis	
Water Storage Projects	
Remaining Growth's Share of the Storage CIP	\$6,598,987
Growth-Related Increase in Capacity Gals/Day (46%)	460,000
Growth-Related Capital Cost per Gallon	\$14.35

Distribution Project

Listed in Figure 7 there is one water distribution project in the City's CIP that is planned for impact fee funding. Importantly, a portion of the project addresses current demand, so only a portion is impact fee eligible. Specifically, the project is replacing 12-inch diameter water mains along O'Brien Ave with 18-inch diameter mains. The existing main has a volume of 8,225 gallons and the new main will have a volume of 18,507 gallons, expanding the volume of the water main by 10,282 gallons or 56 percent (10,282 gallons / 18,507 gallons = 56 percent). Thus, 56 percent of the project is considered impact fee eligible.

Found in the CIP, the project is anticipated to cost a total of \$4.2 million, or \$2.4 million growth-related cost (56 percent). Furthermore, the CIP scheduled \$3,150,000 in cash reserves for the project. Shown in Figure 7, the cash reserves are first attributed to the non-growth cost (\$1,848,000) and remaining cash reserve amount is attributed to the growth cost (\$1,302,000)). As a result, there is a remaining growth cost of \$1,050,000.

Shown at the bottom of the figure, the growth-related capital cost for distribution infrastructure is found by comparing the remaining growth cost and the 2035 peak water system demand (gallons per day). The 2035 peak demand is used to determine the water distribution network that growth is paying into. As a result, water distribution growth-related capital cost per gallon is \$0.67 (\$1,050,009 / 1,563,009 gallons per day = \$0.67 per gallon per day).

Figure 7. Growth-Related Water Distribution Projects Cost Analysis

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Distribution					
Cast Iron Water Main Replacement	Project every other year + 10 new hydrants per project. (O'Brien RR Crossing)	\$4,200,000	56%	\$2,352,000	\$1,848,000
				Cash Reserves [2]	\$1,302,000
				Remaining Funding Need (Growth vs Non-Growth)	\$1,848,000
					\$0

[1] Growth's share is based on the volume increase of the O'Brien Ave. water line. The existing 12-inch main has a volume of 8,225 gals, the new 18-inch main will have a volume of 18,507 gals (56% more capacity).

[2] Cash reserves fully funds the non-growth cost and a portion of the growth's cost

Cost Analysis

Water Distribution Projects	
Growth's Share of Distribution CIP	\$1,050,000
2035 Peak Water System Demand (gals/day)	1,563,009
Growth-Related Capital Cost per Gallon	\$0.67

Water Treatment Plant Project

Lastly, the previous water treatment plant expansion project is examined in Figure 8. The capacity project was funded with debt and, following Montana State Statute, impact fees can fund growth-related debt service. Based on engineering plans, the project added 2 million gallons per day (MGD) to the plant which addressed a deficiency of 0.45 MGD. As a result, the project expanded capacity by 1.54 MGD, or 77 percent (1.54 MGD / 2 MGD = 77 percent).

The total cost of the project was \$11 million, or \$8,470,000 growth-related cost (77 percent). The entire cost was funded by debt issued in 2020; thus, no other revenues (such as cash reserves) need to be incorporated into the analysis. Shown at the bottom of the figure, the growth cost is compared to the growth-related increase in gallons per day capacity to find the water treatment plant growth-related capital cost per gallon of \$5.50 (\$8,470,000 / 1,540,000 gallons per day = \$5.50 per gallon per day).

To ensure there is no double payment for growth-related infrastructure expansion a credit is included in the analysis in the following section to account for future payments on the issued debt.

Figure 8. Growth-Related Water Plant Project Cost Analysis

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Treatment					
Water Plant Expansion	Expanded plant from 3MGD to 5MGD, addressing 0.46MGD deficiency, adding 1.54MGD in growth capacity	\$11,000,000	77%	\$8,470,000	\$2,530,000
				Issued Debt [2]	\$8,470,000 \$2,530,000
				Remaining Funding Need (Growth vs Non-Growth)	\$8,470,000 \$2,530,000

[1] Growth's share based on added capacity 1.54MGD / 2MGD = 77 percent, AE2S June, 2023

[2] Previously issued debt which future impact fees will fund

Cost Analysis	
Water Treatment Projects	
Remaining Growth's Share of the CIP	\$8,470,000
Growth-Related Capacity Expansion (gals/day)	1,540,000
Growth-Related Capital Cost per Gallon	\$5.50

Water Impact Fee Credit Analysis

Evaluation of other revenues funding capital expansion is necessary to ensure the impact fee is proportionate and there are no double charging scenarios.

South Water Storage Credit

Since a portion of the south water storage project will be funded by debt, a credit for future debt payments is included to ensure a future resident is not double charged for the project. To begin, Figure 9 separates out the remaining cost into growth and non-growth-related resulting in 55 percent of the future debt being considered growth-related.

Figure 9. Growth-Related Share of Future Debt

South Water Storage & Production	Remaining Costs	Percent of Total
Growth's Cost	\$6,598,987	55%
Non-Growth Cost	\$5,307,013	45%
Total	\$11,906,000	100%

The debt has yet to be issued, so general financial assumptions are used to project future debt payments (20 year duration and 4.50 percent interest rate). In Figure 10, 55 percent of the future principal payments are compared to projected citywide peak daily water use (gallons). To account for the time value of money, annual payments per gallon are discounted using a net present value formula based on a discount rate of 4.50 percent. As a result, the credit for the future payments is \$2.55 per gallon.

Figure 10. Growth Share of Future Principal Payments & Payment per Gallon – South Water Storage

Year	Principal Payment	Growth Share 55%	Citywide Peak Daily Water Use (gals)	Payment per Gallon
2026	\$379,517	\$208,735	1,366,995	\$0.15
2027	\$396,596	\$218,128	1,387,500	\$0.16
2028	\$414,442	\$227,943	1,408,313	\$0.16
2029	\$433,092	\$238,201	1,429,437	\$0.17
2030	\$452,582	\$248,920	1,450,879	\$0.17
2031	\$472,948	\$260,121	1,472,642	\$0.18
2032	\$494,230	\$271,827	1,494,732	\$0.18
2033	\$516,471	\$284,059	1,517,153	\$0.19
2034	\$539,712	\$296,842	1,539,910	\$0.19
2035	\$563,999	\$310,199	1,563,009	\$0.20
2036	\$589,379	\$324,158	1,586,454	\$0.20
2037	\$615,901	\$338,746	1,610,250	\$0.21
2038	\$643,616	\$353,989	1,634,404	\$0.22
2039	\$672,579	\$369,919	1,658,920	\$0.22
2040	\$702,845	\$386,565	1,683,804	\$0.23
2041	\$734,473	\$403,960	1,709,061	\$0.24
2042	\$767,525	\$422,139	1,734,697	\$0.24
2043	\$802,063	\$441,135	1,760,718	\$0.25
2044	\$838,156	\$460,986	1,787,128	\$0.26
2045	\$875,873	\$481,730	1,813,935	\$0.27
Total	\$11,906,000	\$6,548,300		\$4.08
			Discount Rate	4.50%
			Credit Net Present Value	\$2.55

Water Treatment Plant Credit

A second credit is included to account for the previously issued debt used to fund the water treatment plant expansion. In Figure 11, 77 percent (growth’s share) of the future principal payments are compared to projected citywide peak daily water use (gallons). To account for the time value of money, annual payments per gallon are discounted using a net present value formula based on a discount rate of 4.50 percent. As a result, the credit for the future payments is \$2.54 per gallon.

Figure 11. Growth Share of Future Principal Payments & Payment per Gallon – Water Treatment Plant

Year	Principal Payment	Growth Share 77%	Citywide Peak Daily Water Use (gals)	Payment per Gallon
2026	\$385,000	\$296,450	1,346,793	\$0.22
2027	\$393,000	\$302,610	1,366,995	\$0.22
2028	\$404,000	\$311,080	1,387,500	\$0.22
2029	\$415,000	\$319,550	1,408,313	\$0.23
2030	\$426,000	\$328,020	1,429,437	\$0.23
2031	\$436,000	\$335,720	1,450,879	\$0.23
2032	\$447,000	\$344,190	1,472,642	\$0.23
2033	\$458,000	\$352,660	1,494,732	\$0.24
2034	\$470,000	\$361,900	1,517,153	\$0.24
2035	\$482,000	\$371,140	1,539,910	\$0.24
2036	\$494,000	\$380,380	1,563,009	\$0.24
2037	\$507,000	\$390,390	1,586,454	\$0.25
2038	\$520,000	\$400,400	1,610,250	\$0.25
2039	\$533,000	\$410,410	1,634,404	\$0.25
2040	\$546,000	\$420,420	1,658,920	\$0.25
2041	\$86,000	\$66,220	1,683,804	\$0.04
Total	\$7,002,000	\$5,391,540		\$3.58
			Discount Rate	4.50%
			Credit Net Present Value	\$2.54

Water Department Personnel and Operations

As described in the legal framework section of this report, impact fees are limited to capacity adding capital expansion. No Water Department personnel, operations, or maintenance expenses are allowed to be included in an impact fee and all such expenses are excluded from the impact fee. In addition, the recent revision to Montana State Code does not allow impact fee administrative costs to be funded by impact fee collections. All these expenses are paid for with monthly services charges or other non-impact fee revenue.

Maximum Supportable Water Impact Fees

Figure 12 shows the maximum supportable water impact fees per gallon by component and, following the revisions to the Enabling Legislation, no administrative fee is included in the updated analysis. The figure lists the two credits included in the analysis to ensure no double payments for growth-related water infrastructure which reduces the final cost per gallon to \$15.44.

Further, an EDU generates a demand of 215 daily gallons and represents the demand from a ¾-inch water meter. Thus, the water impact fee for an EDU is \$3,319 (\$15.44 per gallon x 215 gallons = \$3,319, rounded). For developments with a water meter larger than ¾ inch, the respective AWWA capacity ratio is multiplied by the cost per EDU to find the maximum supportable impact fee.

The City may adopt fees that are less than the amounts shown. However, a reduction in impact fee revenue will necessitate an increase in other revenues, a decrease in planned capital expenditures, and/or a decrease in levels of service.

The current fees are included in the figure for comparison purposes. It should be noted that the removal of the administrative fee (5 percent) and decrease in water consumption per EDU (23 percent) result in a decrease in the maximum supportable impact fee amounts.

Figure 12. Maximum Supportable Water Impact Fees

Components	Cost per Gallon
Storage Projects	\$14.35
Distribution Projects	\$0.67
Water Treatment Plant	\$5.50
Gross Total	\$20.52
Credit for Future Storage Bond Payments	(\$2.55)
Credit for Future Plant Bond Payments	(\$2.54)
Net Total	\$15.44
Peak Average Gallons per EDU	215
Capital Cost per EDU	\$3,319

Meter Size (inches)	AWWA Capacity (gal)	Weighting Factor	Maximum Supportable Fee	Current Fee	Increase/ (Decrease)
3/4	30	1.00	\$3,319	\$3,903	(\$584)
1	50	1.67	\$5,543	\$6,518	(\$975)
1 1/2	100	3.33	\$11,052	\$12,997	(\$1,945)
2	160	5.33	\$17,690	\$20,803	(\$3,113)
3	300	10.00	\$33,190	\$39,030	(\$5,840)
4	500	16.67	\$55,328	\$65,063	(\$9,735)
6	1,000	33.33	\$110,622	\$130,087	(\$19,465)

Projected Water Impact Fee Revenue

Revenue projections assume implementation of the maximum supportable water impact fees and that future development is consistent with the land use assumptions described in Appendix A: Land Use Assumptions. To the extent the rate of development either accelerates or slows down, there will be a corresponding change in the impact fee revenue.

As shown in Figure 13, water impact fee revenue is expected to total approximately \$3.3 million over the next 10 years, compared to projected total water expansion cost of \$36.1 million. A portion of the funding gap represents non-growth-related portions of a project, thus not impact fee eligible. Also, the credits included in the analysis reduces the impact fee revenue. Furthermore, in cases where capacity being added to the water system from the project exceed the projected increase in demand for water over the next ten years, the revenue over the next ten years will not fully fund the project. For example, the water treatment plant expansion added 1,540,000 gallons per day, however, growth is projected to increase water demand by 216,000 gallons per day.

At the bottom of the figure, the total impact fee revenue is broken down by component to help inform City capital planning and to highlight that future revenues will not exceed the growth-related capital expansions needs.

Figure 13. Projected Water Impact Fee Revenue

Water Projection	2025	2035	10-Year Increase
Peak Daily Use (gals)	1,346,793	1,563,009	216,215
10-Year Increase in Water Demand (gals)			216,215
Peak Daily Gallons per EDU			215
10-Year Increase in EDUs			1,006
10-Year Increase in EDUs			1,006
Fee per EDU			\$3,319
10-Year Projected Impact Fee Revenue			\$3,337,761

10-Year Impact Fee Revenue	\$3,337,761
Total Water CIP Cost	\$36,106,000
Other Funding Needs	\$32,768,239

	Growth CIP	Portion of Revenue
Storage	\$6,598,987	\$2,552,164
Distribution	\$1,050,000	\$144,866
Plant	\$8,470,000	\$640,731
Total	\$16,118,987	\$3,337,761

WASTEWATER SERVICE AREA REPORT

The Wastewater Service Area Report uses a cost recovery approach when comparing the growth-related cost of the previously constructed wastewater plant to the gallons added to the wastewater network. This analysis determines the average construction cost per gallon to the City of Whitefish to expand that type of infrastructure. The average cost per gallon is then multiplied by the wastewater demand (in gallons) by water meter size to find the maximum supportable impact fee.

Previously, the City had growth-related wastewater collection infrastructure projects that were scheduled to be partially funded with impact fees and in the FY2026 Wastewater Capital Improvement Plan there are growth-related capital costs to expand its wastewater collection network. However, the City plans to fully fund those projects with cash reserves. In this case, where other revenues are fully funding an infrastructure component, the component is removed from future impact fee collection. Thus, the following analysis and updated program will be assessing the impact fee for only the wastewater treatment plant component.

Service Area

The City of Whitefish’s wastewater infrastructure functions as an integrated network. As a result, the service area for the Wastewater Service Area Report is citywide.

Cost Allocation

Costs and resulting impact fees are based on the gallons and wastewater meter size of the development. A ¾-inch wastewater meter is set to one Equivalent Dwelling Unit (EDU) and capacity ratios are applied to larger meters.

Service Demand Units

TischlerBise recommends using the American Waste Works Association (AWWA) flow capacities by meter size to determine the demand from development. Figure 14 lists the capacities and weighting factors from AWWA.

Figure 14. Capacity Factors by Meter Size

Meter Size (inches)	AWWA Capacity (gal) [1]	Weighting Factor
3/4	30	1.00
1	50	1.67
1 1/2	100	3.33
2	160	5.33
3	300	10.00
4	500	16.67
6	1,000	33.33

[1] American Water Works Association

A service unit is a standardized measure of demand. The service unit for the wastewater impact fees is an Equivalent Dwelling Unit (EDU). The standard EDU represents the demand from a single family unit with a ¾-inch water meter. The following section details the calculations to estimate EDU daily wastewater use during peak month. For wastewater service, the level of service is the amount of capacity (gallons)

allocable to an EDU. The level of service generally represents the amount of capacity attributable to an EDU.

Additionally, wastewater infrastructure is constructed to accommodate peak usage demand. Figure 15 lists the 2024 residential wastewater usage by month. Residential usage is analyzed since the vast majority of residential accounts use a ¾ inch meter or one EDU. During the August billing cycle in 2024, there were 3,720 residential accounts which used a peak of 17 million gallons. This results in a daily average of 148 gallons per EDU during peak time. At the need of this chapter, this factor is multiplied by the net capital cost per gallon to find the impact fee per EDU.

At the bottom of Figure 15 the 2024 wastewater use (148 gallons per day) is compared to the average found in the previous wastewater impact fee study (184 gallons per day). In the past two years, wastewater demand per EDU has decreased by 20 percent. The decrease in use is attributed to high household occupancy rates in 2022 and a proactive community conservation effort.

Figure 15. Peak Wastewater Usage

Wastewater Usage (2024)	Residential Gallons	Residential Accounts	Monthly Average (gal)	Daily Average (gal)
January	10,537,200	3,684	2,860	92
February	10,943,560	3,685	2,970	102
March	8,201,680	3,693	2,221	72
April	8,913,890	3,704	2,407	80
May	8,876,200	3,707	2,394	77
June	11,707,410	3,718	3,149	105
July	14,896,530	3,719	4,006	129
August	17,036,330	3,720	4,580	148
September	14,105,810	3,725	3,787	126
October	9,605,540	3,743	2,566	83
November	8,560,980	3,740	2,289	76
December	8,506,890	3,740	2,275	73

Source: City of Whitefish Utility Billing Department

EDU Annual Daily Wastewater Use (gals)	97
EDU Peak Day Wastewater Use (gals)	148
2022 Peak Use (daily gallons)	184
2024 Peak Use (daily gallons)	148
Decrease in Wastewater Use	20%

Wastewater Demand Projection

Figure 16 illustrates the projected increase in wastewater demand in Whitefish. Based on an AE2S long-range planning effort, there is a 1.5 percent annual growth rate in water consumption through 2045 and it is assumed that wastewater demand will grow at the same rate as water use. This annual growth rate is applied to the 10-year growth assumptions. As a result, the peak day wastewater demand increases from 1.17 million gallons to 1.36 million gallons. This is a growth-related increase of 187,000 gallons per day, or a 16 percent increase from the base year.

Figure 16. 10-Year Wastewater Demand Projection

Whitefish, MT	2025 Base Year	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	10-Year Increase
Avg Daily WW Use (gals)	839,002	851,587	864,361	877,326	890,486	903,843	917,401	931,162	945,129	959,306	973,696	134,694
Peak Daily WW Use (gals)	1,167,615	1,185,130	1,202,907	1,220,950	1,239,264	1,257,853	1,276,721	1,295,872	1,315,310	1,335,040	1,355,065	187,450

Source: AE2S long-range planning effort (2025) projects 1.5 percent annual growth rate through 2045

Growth-Related Wastewater Capital Expansion Projects and Cost Analysis

The following section details the calculations to determine the capital cost per gallon to expand wastewater infrastructure by type.

Wastewater Treatment Plant Project

The previous wastewater treatment plant expansion project is examined in Figure 17. The capacity project was funded with debt and, following Montana State Statute, impact fees can fund growth-related debt service. The project replaced a 1.25 MGD plant with a 2 MGD plant, adding 0.75 MGD. As a result, the project is considered 37.5 percent growth-related ($0.75 \text{ MGD} / 2 \text{ MGD} = 37.5 \text{ percent}$).

The total cost of the project was \$26.7 million, or \$10 million growth-related cost (37.5 percent). Furthermore, the City used cash reserves, grant funding, and debt to fund the project. Shown in Figure 17, the cash reserves and grants are attributed to the non-growth cost. As a result, there is a remaining growth cost of \$10 million and a remaining non-growth cost of \$9.9 million.

Shown at the bottom of the figure, the remaining growth cost is compared to the growth-related increase in gallons per day capacity to find the capital cost per gallon of \$13.33 ($\$9,999,904 / 750,000 \text{ gallons per day} = \$13.33 \text{ per gallon per day}$).

To ensure there is no double payment for growth-related infrastructure expansion a credit is included in the analysis in the following section to account for future payments on the issued debt.

Figure 17. Growth-Related Wastewater Plant Project Cost Analysis

Growth-Related Wastewater Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Treatment					
Wastewater Plant	Replaced 1.25MGD plant with 2MGD plant, adding 0.75MGD	\$26,666,410	37.5%	\$9,999,904	\$16,666,506
				Cash Reserves [2]	\$5,721,410
				Grants [3]	\$1,020,000
Remaining Funding Need (Growth vs Non-Growth)				\$9,999,904	\$9,925,096

[1] Growth's share is based on increase in capacity 0.75MGD / 2MGD = 37.5 percent

[2] Cash reserves funds a portion of the non-growth cost

[3] Grants fund a portion of the non-growth cost

Cost Analysis	
Water Treatment Projects	
Remaining Growth-Related Cost	\$9,999,904
Growth-Related Increase in Capacity Gals/Day	750,000
Capital Cost per Gallon	\$13.33

Wastewater Impact Fee Credit Analysis

Evaluation of other revenues funding capital expansion is necessary to ensure the impact fee is proportionate and there are no double charging scenarios.

Wastewater Treatment Plan Credit

Since a portion of the wastewater plant project will be funded by debt, a credit for future debt payments is included to ensure a future resident is not double charged for the project. To begin, Figure 18 separates out the remaining cost into growth and non-growth-related resulting in 50 percent of the future debt being considered growth-related.

Figure 18. Growth-Related Share of Future Debt

Wastewater Plant	Remaining Costs	Percent of Total
Growth's Cost	\$9,999,904	50%
Non-Growth Cost	\$9,925,096	50%
Total		\$19,925,000 100%

In Figure 19, 50 percent (growth's share) of the future principal payments are compared to projected citywide peak daily wastewater use (gallons). To account for the time value of money, annual payments per gallon are discounted using a net present value formula based on a discount rate of 4.50 percent. As a result, the credit for the future payments is \$4.15 per gallon.

Figure 19. Growth Share of Future Principal Payments & Payment per Gallon – Wastewater Plant

Year	Total Principal Payment	Growth Share 50%	Citywide Peak Daily WW Use (gallons)	Payment per Gallon
2026	\$872,000	\$436,000	1,185,130	\$0.37
2027	\$894,000	\$447,000	1,202,907	\$0.37
2028	\$916,000	\$458,000	1,220,950	\$0.38
2029	\$940,000	\$470,000	1,239,264	\$0.38
2030	\$963,000	\$481,500	1,257,853	\$0.38
2031	\$986,000	\$493,000	1,276,721	\$0.39
2032	\$1,011,000	\$505,500	1,295,872	\$0.39
2033	\$1,038,000	\$519,000	1,315,310	\$0.39
2034	\$1,064,000	\$532,000	1,335,040	\$0.40
2035	\$1,090,000	\$545,000	1,355,065	\$0.40
2036	\$1,117,000	\$558,500	1,375,391	\$0.41
2037	\$1,146,000	\$573,000	1,396,022	\$0.41
2038	\$1,175,000	\$587,500	1,416,962	\$0.41
2039	\$1,204,000	\$602,000	1,438,217	\$0.42
2040	\$916,000	\$458,000	1,459,790	\$0.31
Total	\$15,332,000	\$7,666,000		\$5.81
			Discount Rate	4.50%
			Credit Net Present Value	\$4.15

Wastewater Department Personnel and Operations

As described in the legal framework section of this report, impact fees are limited to capacity adding capital expansion. No Wastewater Department personnel, operations, or maintenance expenses are allowed to be included in an impact fee and all such expenses are excluded from the impact fee. In addition, the recent revision to Montana State Code does not allow impact fee administrative costs to be funded by impact fee collections. All these expenses are paid for with monthly services charges or other non-impact fee revenue.

Maximum Supportable Wastewater Impact Fees

Figure 20 shows the maximum supportable wastewater impact fees per gallon and, following the revisions to the Enabling Legislation, no administrative fee is included in the updated analysis. The figure lists the credit included in the analysis to ensure no double payments for growth-related wastewater infrastructure which reduces the final cost per gallon to \$9.18.

Further, an EDU generates a demand of 148 daily gallons and represents the demand from a ¾-inch wastewater meter. Thus, the wastewater impact fee for an EDU is \$1,359 (\$9.18 per gallon x 148 gallons = \$1,359, rounded). For developments with a wastewater meter larger than ¾ inch, the respective AWWA capacity ratio is multiplied by the cost per EDU to find the maximum supportable impact fee.

The City may adopt fees that are less than the amounts shown. However, a reduction in impact fee revenue will necessitate an increase in other revenues, a decrease in planned capital expenditures, and/or a decrease in levels of service.

The current fees are included in the figure for comparison purposes. It should be noted that the removal of the administrative fee (5 percent), the decrease in wastewater demand per EDU (20 percent), and the removal of the wastewater collection component results in a decrease in the maximum supportable impact fee amount.

Figure 20. Maximum Supportable Wastewater Impact Fees

Components		Cost per Gallon
Wastewater Treatment Plant		\$13.33
Gross Total		\$13.33
Credit for Future Plant Bond Payments		(\$4.15)
Net Total		\$9.18
 Peak Average Gallons per EDU		 148
Capital Cost per EDU		\$1,359

Meter Size (inches)	AWWA Capacity (gal)	Weighting Factor	Maximum Supportable Fee	Current Fee	Increase/ (Decrease)
3/4	30	1.00	\$1,359	\$4,041	(\$2,682)
1	50	1.67	\$2,270	\$6,748	(\$4,478)
1 1/2	100	3.33	\$4,525	\$13,457	(\$8,932)
2	160	5.33	\$7,243	\$21,539	(\$14,296)
3	300	10.00	\$13,590	\$40,410	(\$26,820)
4	500	16.67	\$22,655	\$67,363	(\$44,708)
6	1,000	33.33	\$45,295	\$134,687	(\$89,392)

Projected Wastewater Impact Fee Revenue

Revenue projections assume implementation of the maximum supportable wastewater impact fees and that future development is consistent with the land use assumptions described in Appendix A: Land Use Assumptions. To the extent the rate of development either accelerates or slows down, there will be a corresponding change in the impact fee revenue.

As shown in Figure 21, wastewater impact fee revenue is expected to total approximately \$1.7 million over the next 10 years, compared to projected total wastewater expansion cost of \$27.6 million. A portion of the funding gap represents non-growth-related portions of the wastewater plant project, thus not impact fee eligible. Also, the credit included in the analysis reduces the impact fee revenue. Furthermore, in cases where capacity being added to the system from the project exceed the projected increase in demand for wastewater capacity over the next ten years, the revenue over the next ten years will not fully fund the project. Specifically, the treatment plant expansion added 750,000 gallons per day, however, growth is projected to increase demand by 187,000 gallons per day.

At the bottom of the figure, the impact fee revenue is compared to the CIP growth cost to highlight that revenues will not exceed the growth-related capital expansions needs.

Figure 21. Projected Wastewater Impact Fee Revenue

Wastewater Projection	2025	2035	10-Year Increase
Peak Daily Use (gals)	1,167,615	1,355,065	187,450
10-Year Increase in WW Demand (gals)			187,450
Peak Daily Gallons per EDU			148
10-Year Increase in EDUs			1,267
10-Year Increase in EDUs			1,267
Fee per EDU			\$1,359
10-Year Projected Impact Fee Revenue			\$1,721,246

10-Year Impact Fee Revenue	<u>\$1,721,246</u>
Total Wastewater CIP Cost	<u>\$27,622,410</u>
Other Funding Needs	<u>\$25,901,164</u>

	Growth CIP	Portion of Revenue
Treatment	\$9,999,904	\$1,721,246
Total	\$9,999,904	\$1,721,246

CAPITAL IMPROVEMENT PLAN

Following State of Montana enabling legislation (§7-6-1602(2)), the Service Area Report needs to identify capital improvements necessary to meet future needs. The following figures lists the growth-related capital plans for each department included in this analysis and mirrors projects included in the body of the report used to calculate the impact fee. The City annually prepares a more comprehensive CIP that includes non-growth-related projects that are not included in this analysis.

Figure 22. Water Storage Growth-Related Capital Improvement Plan

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Storage					
South Water Storage & Production	Additional storage south of HWY 40 including tank facility, transmission mains, and booster pump	\$20,906,000	46%	\$9,616,760	\$11,289,240
				Cash Reserves [2]	-
				Impact Fee Fund Balance [3]	\$3,017,773
				Remaining Funding Need (Growth vs Non-Growth)	\$6,598,987
					\$5,307,013

[1] There is a current deficit of 0.54MG. Thus, 0.46 is the added capacity, growth's share. *Preliminary Engineering Report, AE2S, May 2025*

[2] Cash reserves funding towards non-growth cost

[3] Impact fee fund balance funding towards growth's cost

Figure 23. Water Distribution Growth-Related Capital Improvement Plan

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Distribution					
Cast Iron Water Main Replacement	Project every other year + 10 new hydrants per project. (O'Brien RR Crossing)	\$4,200,000	56%	\$2,352,000	\$1,848,000
				Cash Reserves [2]	\$1,302,000
				Remaining Funding Need (Growth vs Non-Growth)	\$1,050,000
					\$0

[1] Growth's share is based on the volume increase of the O'Brien Ave. water line. The existing 12-inch main has a volume of 8,225 gals, the new 18-inch main will have a volume of 18,507 gals (56% more capacity).

[2] Cash reserves fully funds the non-growth cost and a portion of the growth's cost

Figure 24. Water Plant Expansion Growth-Related Capital Improvement Plan

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Treatment					
Water Plant Expansion	Expanded plant from 3MGD to 5MGD, addressing 0.46MGD deficiency, adding 1.54MGD in growth capacity	\$11,000,000	77%	\$8,470,000	\$2,530,000
				Issued Debt [2]	\$8,470,000
				Remaining Funding Need (Growth vs Non-Growth)	\$8,470,000
					\$2,530,000

[1] Growth's share based on added capacity 1.54MGD / 2MGD = 77 percent, AE2S June, 2023

[2] Previously issued debt which future impact fees will fund

Figure 25. Wastewater Plant Expansion Growth-Related Capital Improvement Plan

Growth-Related Wastewater Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Treatment					
Wastewater Plant	Replaced 1.25MGD plant with 2MGD plant, adding 0.75MGD	\$26,666,410	37.5%	\$9,999,904	\$16,666,506
				Cash Reserves [2]	\$5,721,410
				Grants [3]	\$1,020,000
Remaining Funding Need (Growth vs Non-Growth)				\$9,999,904	\$9,925,096

[1] Growth's share is based on increase in capacity 0.75MGD / 2MGD = 37.5 percent

[2] Cash reserves funds a portion of the non-growth cost

[3] Grants fund a portion of the non-growth cost

APPENDIX A: LAND USE ASSUMPTIONS

Impact fees often use per capita standards and persons per housing unit or persons per household to derive proportionate share fee amounts. Housing types have varying household sizes and, consequently, a varying demand on City infrastructure and services. Thus, it is important to differentiate between housing types and size.

When persons per housing unit (PPHU) is used in the development impact fee calculations, infrastructure standards are derived using year-round population. In contrast, when persons per household (PPHH) is used in the development impact fee calculations, the fee methodology assumes all housing units will be occupied, thus requiring seasonal or peak population to be used when deriving infrastructure standards. The City of Whitefish and the surrounding area is home to a large number of second/vacation homes and hosts many visitors throughout the year. Thus, TischlerBise recommends that fees for residential development in Whitefish be imposed according to persons per household.

Based on housing characteristics, TischlerBise recommends using two housing unit categories for the Impact Fee study: (1) Single Family and (2) Multifamily. Each housing type has different characteristics which results in a different demand on City facilities and services. Figure 26 shows the US Census American Community Survey 2023 5-Year Estimates data for the City of Whitefish. Single family units have an average household size of 2.21 persons and multifamily units have an average household size of 1.52 persons. Additionally, there is a housing mix of 70 percent single family and 30 percent multifamily.

The estimates in Figure 26 are for household size calculations. Base year population and housing units are estimated with another, more recent data source.

Figure 26. Persons per Household

Housing Type	Persons	Housing Units	Persons per Housing Unit	Households	Persons per Household	Housing Unit Mix	Vacancy Rate
Single Family [1]	6,503	3,571	1.82	2,938	2.21	70%	21.5%
Multifamily [2]	1,749	1,495	1.17	1,150	1.52	30%	30.0%
Total	8,252	5,066	1.63	4,088	2.02		23.9%

[1] Includes attached and detached single family homes and mobile homes

[2] Includes all other types

Source: U.S. Census Bureau, 2023 American Community Survey 5-Year Estimates

Building Permit History

In Figure 27 and Figure 28 the past seven years of building permit history is listed by housing type to understand the recent growth trend in Whitefish. There was been a noticeable uptick in residential development from 2019 to 2021, peaking in 2020. However, beginning in 2022 housing development has decreased year-over-year down to 44 total units in 2024. As a result, the 7-year annual average is 163 units while the average in the last three years is 77 units.

Although, the past three years may be a correction from the growth spike that occurred in the preceding years, the analysis conservatively assumes the 3-year average of 49 single family and 28 multifamily units will continue over the next ten years.

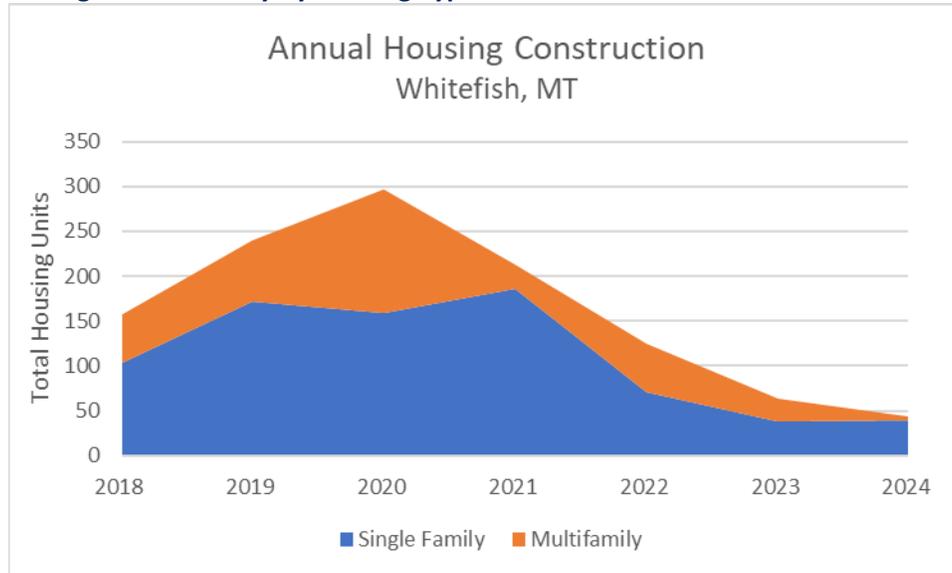
Figure 27. Building Permit History by Housing Type - Table

Housing Type	2018	2019	2020	2021	2022	2023	2024	7-Year Total	7-Year Average	2022-24 Average
Single Family	104	172	159	186	70	38	40	769	110	49
Multifamily	54	68	138	27	54	25	4	370	53	28
Total	158	240	297	213	124	63	44	1,139	163	77

[1] Single family detached, townhouse, and duplex

Source: City of Whitefish

Figure 28. Building Permit History by housing Type – Chart



Base Year Housing Units and Population

To calculate the base year (2025) housing stock, the housing estimates from the 2023 Whitefish impact fee study are used. At that time, there were an estimated 4,021 single family and 1,691 multifamily units (Figure 29). Since then, there have been 78 single family and 29 multifamily units constructed resulting in a total of 5,189 units.

Figure 29. Base Year Housing Units

City of Whitefish, MT	2023 [1]	New Units [2]	Base Year 2025
Single Family	4,021	78	4,099
Multifamily	1,691	29	1,720
Total Housing Units	5,712	107	5,819

[1] 2023 Whitefish Impact Fee Study, TischlerBise

[2] Whitefish building permit data

Furthermore, the nature of the influx of seasonal population in Whitefish necessitates three types of populations to be included in the impact fee study:

1. Permanent Residents
2. Seasonal Residents

3. Visitors

Whitefish is a destination for vacationers and because of the presence of temporary residents and visitors, City facilities and services have been sized to accommodate the additional demand. The peak population includes residents who have second homes in the city and the seasonal labor influx during peak tourism months. The City is updating its *Growth Policy* and the 2025 permanent (9,665 residents) and seasonal (4,142 residents) population has been estimated in the December, 2024 draft Demographic chapter.

The visitor population includes overnight visitors at lodging locations. Based on data presented in the draft 2025 *Growth Policy* there is a total of 1,275 lodging rooms in Whitefish and there is an average of 2.2 visitors per room. Additionally, TischlerBise applies an occupancy rate of 95 percent during the peak season in Whitefish. As a result, there is an estimated 2,663 overnight visitors during peak season (see Figure 32).

Figure 30. Lodging Rooms and Peak Visitors

Property [1]	Rooms
Hotel/Motel Properties	1,217
RV Properties	57
Total	1,274

Total Lodging Rooms	1,274
Assumed Average Occupancy [2]	2.2
Assumed Peak Season Occupancy Rate [3]	95%
Total Overnight-Visitors	2,663

[1] Whitefish Growth Policy (2025) draft; Whitefish Convention and Visitor Bureau

[2] Whitefish Growth Policy (2025) draft; University of Montana's Institute for Tourism and Recreation

[3] TischlerBise general peak season lodging factor

The information above is summarized in Figure 33. Based on the three population types, there is an estimated peak population of 16,470 residents along with 5,819 housing units in Whitefish.

Figure 31. Base Year Housing and Population

City of Whitefish, MT	Base Year 2025
Permanent Hsg Population	9,665
Seasonal Hsg Population	4,142
Overnight-Visitors	2,663
Total Peak Population [1]	16,470
Housing Units [2]	
Single Family	4,099
Multifamily	1,720
Total Housing Units	5,819

[1] Whitefish Growth Policy (2025) draft

[2] TischlerBise 2023 Whitefish Impact Fee Study plus new housing construction since 2023

Housing Unit and Population Projections

The ten-year residential projections are listed in Figure 34. To begin, the housing development projections are based on the three-year annual building permit average (49 single family units and 28 multifamily units annually). In addition, there are two multifamily projects under construction which will total 360 units. Those developments are assumed to account for the current trend plus above and beyond the annual projection. Thus, the 360 new units are included in the 2026 housing growth projection.

As a result, the ten-year growth projection includes 1,102 new housing units over the next ten years. Whitefish permanent and seasonal population growth is assumed to grow based on housing development and PPHH factors. As a result, permanent population is assumed to grow by 1,413 residents and seasonal population is assumed to grow by 602 residents.

Also, from the recent *Housing Needs Assessment* report there are 93 lodging rooms in the development pipeline. This growth is assumed to occur over the next three years generating 59 new overnight visitors annually. Tourism in and around Whitefish is anticipated to continue, so the annual growth in overnight-visitors is assumed to continue through 2035. In total, the peak population within the current city boundaries is projected to grow by 2,604 residents, 15.8 percent from 2025.

This is a reduction in projected growth compared to the 2023 impact fee study. Since 2023 there has been a year-over-year decrease in housing development. Although the past three years may be a correction from the growth spike that occurred in the preceding years, the analysis conservatively assumes the 3-year average will continue over the next ten years. Also, the 15.8 percent growth rate over the next ten years is consistent with the updated *Growth Policy* annual growth rate projections of 1.5 percent.

Additionally, the Big Mountain Annexation is anticipated to occur within the next ten years. Conservatively, the annexation is included in Year 5. By the time of annexation, there will be an estimated 1,035 housing units in the area. The population estimate from the annexation is based on the housing estimate and the average PPHH factor, resulting in 2,091 new residents to Whitefish. Within the current and annexed areas, the City of Whitefish is projected to grow from 16,470 peak population to 21,615 peak population over the next ten years.

Figure 32. Residential Development Projections

City of Whitefish, MT	Base Year 2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	Total Increase
Permanent Hsg Pop [1]	9,665	10,124	10,230	10,336	10,442	10,548	10,654	10,760	10,866	10,972	11,078	1,413
Seasonal Hsg Pop [1]	4,142	4,339	4,384	4,429	4,474	4,519	4,564	4,609	4,654	4,699	4,744	602
Overnight-Visitors [2]	2,663	2,722	2,781	2,840	2,899	2,958	3,016	3,075	3,134	3,193	3,252	589
Total Peak Population	16,470	17,185	17,395	17,605	17,815	18,025	18,234	18,444	18,654	18,864	19,074	2,604
<i>Percent Increase</i>		<i>4.3%</i>	<i>1.2%</i>	<i>1.2%</i>	<i>1.2%</i>	<i>1.2%</i>	<i>1.2%</i>	<i>1.2%</i>	<i>1.1%</i>	<i>1.1%</i>	<i>1.1%</i>	15.8%
<i>Population Post-Annexation</i>		-	-	-	-	20,116	20,325	20,535	20,745	20,955	21,165	
Housing Units [3]												
Single Family	4,099	4,148	4,197	4,246	4,295	4,344	4,393	4,442	4,491	4,540	4,589	490
Multifamily	1,720	2,080	2,108	2,136	2,164	2,192	2,220	2,248	2,276	2,304	2,332	612
Total Housing Units	5,819	6,228	6,305	6,382	6,459	6,536	6,613	6,690	6,767	6,844	6,921	1,102
<i>Big Mountain Annexation [4]</i>		-	-	-	-	1,035	1,035	1,035	1,035	1,035	1,035	
<i>Housing Units Post-Annexation</i>		-	-	-	-	7,725	7,725	7,725	7,725	7,725	7,725	

[1] Permanent and seasonal population growth is based on housing development and PPHH factors.

[2] Growth in overnight-visitors is assumed to grow consistently with the available pipeline data in the *Housing Needs Assessment (2022)*.

[3] Single family and multifamily projections are based on the three-year annual average of building permit data. In addition, there are two multifamily projects under construction which will total 360 units. Those developments are included in 2026.

[4] The Big Mountain Annexation is anticipated to occur within the next ten years. Conservatively, the annexation is included in 2030. The number of housing units is estimated based on available utility data. Population projections are based on the housing estimate and the average PPHH factor.

Current Employment and Nonresidential Floor Area

Base year employment is calculated with job estimates from the 2023 impact fee study and commercial growth since 2023. Shown in Figure 35 this results in 5,682 jobs, retail accounting for 43 percent of the employment.

Figure 33. Base Year Employment by Industry

Employment Industries	2023 Jobs [1]	2024 New Jobs [2]	2025 Jobs	Percent of Total
Retail	2,420	15	2,435	43%
Office	1,448	6	1,454	26%
Industrial	386	0	386	7%
Institutional	1,408	0	1,408	25%
Total	5,661	21	5,682	100%

[1] Source: ESRI Business Analyst; 2023 Whitefish Impact Fee Study

[2] Source: Commercial construction in 2024

The base year nonresidential floor area for the industry sectors is calculated with the Institution of Transportation Engineers' (ITE) square feet per employee averages, Figure 36. For the retail industry the Shopping Center land use factors are used; for office the General Office factors are used; for industrial the Light Industrial factors are used; for Institutional the Hospital factors are used.

Figure 34. Institute of Transportation Engineers (ITE) Employment Density Factors

Employment Industry	ITE Code	Land Use	Demand Unit	Emp Per Dmd Unit	Sq Ft Per Emp
Retail	820	Shopping Center	1,000 Sq Ft	2.12	471
Office	710	General Office	1,000 Sq Ft	3.26	307
Industrial	110	Light Industrial	1,000 Sq Ft	1.57	637
Institutional	610	Hospital	1,000 Sq Ft	2.86	350

Source: *Trip Generation*, Institute of Transportation Engineers, 11th Edition (2021)

By combining the base year job totals and the ITE square feet per employee factors the nonresidential floor area is calculated in Figure 37. There is an estimated total of 2,333,647 square feet of floor area in Whitefish. Retail industries accounts for the greatest share, approximately 49 percent. Institutional accounts for 21 percent, office accounts for 19 percent, and industrial accounts for 11 percent.

Figure 35. Base Year Nonresidential Floor Area

Employment Industries	Base Year Jobs [1]	Sq. Ft. Per job [2]	Floor Area (sq. ft.)	Percent of Total
Retail	2,435	471	1,146,737	49%
Office	1,454	307	446,378	19%
Industrial	386	637	245,882	11%
Institutional	1,408	350	492,650	21%
Total	5,682		2,331,647	100%

[1] Source: TischlerBise analysis of 2023 job estimate plus growth

[2] Source: *Trip Generation*, Institute of Transportation Engineers, 11th Edition (2021)

Employment and Nonresidential Floor Area Projections

Based on the *Housing Needs Assessment (2022)*, employment is projected to grow by an annual growth rate of 1.8 percent through 2030. This factor is assumed to be appropriate for Whitefish through 2035 and is applied to the base year estimates to project the ten-year employment growth. As a result, there are 1,108 new jobs projected, a 19.5 percent increase from the base year. Retail development accounts for the greatest share of the increase.

The nonresidential floor area projections are calculated by applying the ITE square feet per employee factors to the job growth. Over the next ten years, the nonresidential floor area is projected to increase by 445,000 square feet.

Figure 36. Employment and Nonresidential Floor Area Projections

Industry	Base Year 2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	Total Increase
Jobs [1]												
Retail	2,435	2,478	2,523	2,568	2,615	2,662	2,709	2,758	2,808	2,858	2,909	475
Office	1,454	1,480	1,507	1,534	1,561	1,589	1,618	1,647	1,677	1,707	1,738	284
Industrial	386	393	400	407	415	422	430	437	445	453	461	75
Institutional	1,408	1,433	1,459	1,485	1,512	1,539	1,566	1,595	1,623	1,652	1,682	274
Total	5,682	5,784	5,888	5,994	6,102	6,212	6,323	6,437	6,553	6,670	6,790	1,108
<i>Percent Increase</i>		<i>1.8%</i>	19.5%									
Nonresidential Floor Area (1,000 sq. ft.) [2]												
Retail	1,147	1,167	1,188	1,210	1,231	1,254	1,276	1,299	1,322	1,346	1,370	224
Office	446	454	463	471	479	488	497	506	515	524	533	87
Industrial	246	250	255	259	264	269	274	279	284	289	294	48
Institutional	493	502	511	520	529	539	548	558	568	578	589	96
Total	2,332	2,374	2,416	2,460	2,504	2,549	2,595	2,641	2,689	2,737	2,786	455

[1] Source: ESRI Business Analyst; Whitefish *Housing Needs Assessment (2022)* annual growth rate

[2] Source: Institute of Transportation Engineers, *Trip Generation*, 2021

APPENDIX B: LAND USE DEFINITIONS

Residential Development

As discussed below, residential development categories are based on data from the U.S. Census Bureau, American Community Survey. Whitefish will collect development fees from all new residential units.

Single Family:

1. Single-family detached is a one-unit structure detached from any other house, that is, with open space on all four sides. Such structures are considered detached even if they have an adjoining shed or garage. A one-family house that contains a business is considered detached as long as the building has open space on all four sides.
2. Single-family attached (townhouse) is a one-unit structure that has one or more walls extending from ground to roof separating it from adjoining structures. In row houses (sometimes called townhouses), double houses, or houses attached to nonresidential structures, each house is a separate, attached structure if the dividing or common wall goes from ground to roof.
3. Mobile home includes both occupied and vacant mobile homes, to which no permanent rooms have been added, are counted in this category. Mobile homes used only for business purposes or for extra sleeping space and mobile homes for sale on a dealer's lot, at the factory, or in storage are not counted in the housing inventory.

Multifamily:

1. 2+ units (duplexes and apartments) are units in structures containing two or more housing units, further categorized as units in structures with "2, 3 or 4, 5 to 9, 10 to 19, 20 to 49, and 50 or more apartments."
2. Boat, RV, Van, etc. includes any living quarters occupied as a housing unit that does not fit the other categories (e.g., houseboats, railroad cars, campers, and vans). Recreational vehicles, boats, vans, railroad cars, and the like are included only if they are occupied as a current place of residence.

Nonresidential Development

The proposed general nonresidential development categories (defined below) can be used for all new construction within Whitefish. Nonresidential development categories represent general groups of land uses that share similar average weekday vehicle trip generation rates and employment densities (i.e., jobs per 1,000 square feet of floor area).

Retail: Establishments primarily selling merchandise, eating/drinking places, and entertainment uses. By way of example, *Retail* includes shopping centers, supermarkets, pharmacies, restaurants, bars, nightclubs, automobile dealerships, and movie theaters.

Industrial: Establishments primarily engaged in the production, transportation, or storage of goods. By way of example, *Industrial* includes manufacturing plants, distribution warehouses, trucking companies, utility substations, power generation facilities, and telecommunications buildings.

Office: Establishments providing management, administrative, professional, or business services. By way of example, *Office* can include business offices, office parks, and corporate headquarters.

Institutional: Establishments providing education and healthcare services. By way of example, *Institutional* includes universities, nursing homes, daycare facilities, and hospitals.

City of Whitefish Water and Sewer Updated Impact Fee Results

January 5, 2025



Whitefish Impact Fee Study

- The City has completed projects in the previous CIP
- State revised impact fee legislation
- To ensure the City's has a current CIP for impact fee funded projects and to be consistent with updated legislation TischlerBise is updating the water and sewer analysis

Whitefish Impact Fee Study

- SB133 restricted impact fees to only be used for water, wastewater, roads, stormwater, police, fire, EMS
- Thus, Whitefish has removed its parks, pathways, city hall fee collections
- Removed the 5% admin fee as well

- City's police and fire CIP is still current, no need to update that analysis until required 5-year cycle

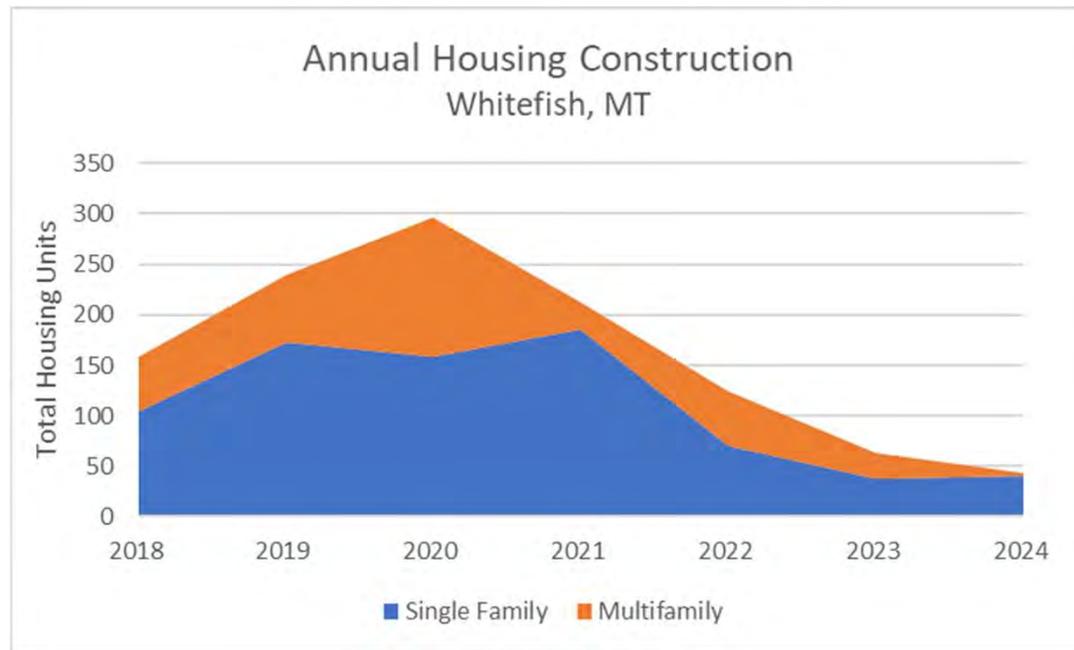
Whitefish Impact Fee Study

- Methodology has stayed the same as previous analysis



Whitefish Impact Fee Study

- Annual Housing Construction



Housing Type	2018	2019	2020	2021	2022	2023	2024	7-Year Total	7-Year Average	2022-24 Average
Single Family	104	172	159	186	70	38	40	769	110	49
Multifamily	54	68	138	27	54	25	4	370	53	28
Total	158	240	297	213	124	63	44	1,139	163	77

Whitefish Impact Fee Study

- Residential Projection
 - New construction has slowed, conservative estimate continues 3-year average
 - 40% of the housing projection in the 2023 impact fee study

City of Whitefish, MT	Base Year 2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	Total Increase
Permanent Hsg Pop [1]	8,686	8,801	8,915	9,030	9,145	9,260	9,375	9,490	9,605	9,720	9,835	1,149
Seasonal Hsg Pop [1]	4,117	4,172	4,226	4,281	4,335	4,390	4,444	4,499	4,553	4,608	4,662	545
Overnight-Visitors [2]	1,467	1,526	1,585	1,644	1,703	1,762	1,820	1,879	1,938	1,997	2,056	589
Total Peak Population	14,270	14,498	14,727	14,955	15,183	15,412	15,640	15,868	16,097	16,325	16,553	2,283
<i>Percent Increase</i>		1.6%	1.6%	1.6%	1.5%	1.5%	1.5%	1.5%	1.4%	1.4%	1.4%	16.0%
<i>Population Post-Annexation</i>		-	-	-	-	-	-	17,959	18,188	18,416	18,644	
Housing Units [3]												
Single Family	4,099	4,148	4,197	4,246	4,295	4,344	4,393	4,442	4,491	4,540	4,589	490
Multifamily	1,720	1,748	1,776	1,804	1,832	1,860	1,888	1,916	1,944	1,972	2,000	280
Total Housing Units	5,819	5,896	5,973	6,050	6,127	6,204	6,281	6,358	6,435	6,512	6,589	770
<i>Big Mountain Annexation [4]</i>		-	-	-	-	1,035	1,035	1,035	1,035	1,035	1,035	
<i>Housing Units Post-Annexation</i>		-	-	-	-	7,393	7,393	7,393	7,393	7,393	7,393	

[1] Permanent and seasonal population growth is assumed to grow at the same rate as housing development.
 [2] Growth in overnight-visitors is assumed to grow consistently with the available pipeline data in the *Housing Needs Assessment* (2022).
 [3] Single family and multifamily projections are based on the three-year annual average of building permit data.
 [4] The Big Mountain Annexation is anticipated to occur within the next ten years. Conservatively, the annexation is included in 2030. The number of housing units is estimated based on available utility data. Population projections are based on the housing estimate and the average PPHH factor.

Whitefish Impact Fee Study

- Nonresidential Projection
 - Same growth rate assumed in 2023 impact fee study, consistent with recent growth

Industry	Base Year 2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	Total Increase
Jobs [1]												
Retail	2,435	2,478	2,523	2,568	2,615	2,662	2,709	2,758	2,808	2,858	2,909	475
Office	1,454	1,480	1,507	1,534	1,561	1,589	1,618	1,647	1,677	1,707	1,738	284
Industrial	386	393	400	407	415	422	430	437	445	453	461	75
Institutional	1,408	1,433	1,459	1,485	1,512	1,539	1,566	1,595	1,623	1,652	1,682	274
Total	5,682	5,784	5,888	5,994	6,102	6,212	6,323	6,437	6,553	6,670	6,790	1,108
<i>Percent Increase</i>		<i>1.8%</i>	19.5%									
Nonresidential Floor Area (1,000 sq. ft.) [2]												
Retail	1,147	1,167	1,188	1,210	1,231	1,254	1,276	1,299	1,322	1,346	1,370	224
Office	446	454	463	471	479	488	497	506	515	524	533	87
Industrial	246	250	255	259	264	269	274	279	284	289	294	48
Institutional	493	502	511	520	529	539	548	558	568	578	589	96
Total	2,332	2,374	2,416	2,460	2,504	2,549	2,595	2,641	2,689	2,737	2,786	455

[1] Source: ESRI Business Analyst; Whitefish *Housing Needs Assessment* (2022) annual growth rate

[2] Source: Institute of Transportation Engineers, *Trip Generation*, 2021

Whitefish Impact Fee Study

- Water
- Wastewater
- Summary

Water

- Finding the capital cost per gallon to expand infrastructure
- Storage (new), distribution, plant
- Equivalent dwelling unit (EDU) used to find proportionate demand and fee
 - Peak day gallons
- Credit included for bond payments to ensure no double payment
- Removed admin 5% for new State law

Water

- Peak use has decreased 23% from 2022
- Attributed to occupancy changes and overall conservation efforts

Water Usage (2024)	Residential Gallons	Residential Accounts	Monthly Average (gal)	Daily Average (gal)
January	9,956,070	3,528	2,822	91
February	10,683,340	3,530	3,026	104
March	7,841,530	3,539	2,216	71
April	8,752,120	3,544	2,470	82
May	8,719,640	3,548	2,458	79
June	14,016,230	3,557	3,940	131
July	18,919,460	3,557	5,319	172
August	23,723,280	3,556	6,671	215
September	17,917,520	3,560	5,033	168
October	10,756,540	3,573	3,011	97
November	8,384,490	3,569	2,349	78
December	8,353,270	3,570	2,340	75

Source: City of Whitefish Utility Billing Department

EDU Annual Daily Water Use (gals) **114**

EDU Peak Day Water Use (gals) **215**

2024 Peak Use **215**

2022 Peak Use **281**

Decrease in Water Use **23%**

Water

- 16% increase in water demand

Whitefish, MT	2025 Base Year	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	Increase
Avg Daily Water Use (gallons)	836,834	849,387	862,128	875,060	888,186	901,508	915,031	928,756	942,688	956,828	971,180	134,346
Peak Daily Water Use (gallons)	1,346,793	1,366,995	1,387,500	1,408,313	1,429,437	1,450,879	1,472,642	1,494,732	1,517,153	1,539,910	1,563,009	216,215

Source: AE2S long-range planning effort (2025) projects 1.5 percent annual growth rate through 2045

Water

- Storage Projects Cost per Gallon
 - This was previously grouped in distribution category
 - Existing deficiency results in 46% growth-related
 - Previous cost was \$13.1M, recent engineered plan now estimates \$20.1M
 - Scheduled funding arrangements reduces growth and non-growth cost

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Storage					
South Water Storage & Production	Additional storage south of HWY 40 including tank facility, transmission mains, and booster pump	\$20,906,000	46%	\$9,616,760	\$11,289,240
				Cash Reserves [2]	\$5,982,227
				Impact Fee Fund Balance [3]	\$3,017,773
				Remaining Funding Need (Growth vs Non-Growth)	\$6,598,987 \$5,307,013
[1] There is a current deficit of 0.54MG. Thus, 0.46 is the added capacity, growth's share. <i>Preliminary Engineering Report, AE2S, May 2025</i> [2] Cash reserves funding towards non-growth cost [3] Impact fee fund balance funding towards growth's cost					
Cost Analysis					
Water Storage Projects					
Remaining Growth's Share of the Storage CIP		\$6,598,987			
Growth-Related Increase in Capacity Gals/Day (46%)		460,000			
Growth-Related Capital Cost per Gallon		\$14.35			

Water

- Storage Projects Credit
 - Bond has not been issued yet
 - Future payments are estimated based on current debt standards

South Water Storage & Production	Remaining Costs	Percent of Total
Growth's Cost	\$6,598,987	55%
Non-Growth Cost	\$5,307,013	45%
Total	\$11,906,000	100%

Year	Principal Payment	Growth Share 55%	Citywide Peak Daily Water Use (gals)	Payment per Gallon
2026	\$379,517	\$208,735	1,366,995	\$0.15
2027	\$396,596	\$218,128	1,387,500	\$0.16
2028	\$414,442	\$227,943	1,408,313	\$0.16
2029	\$433,092	\$238,201	1,429,437	\$0.17
2030	\$452,582	\$248,920	1,450,879	\$0.17
2031	\$472,948	\$260,121	1,472,642	\$0.18
2032	\$494,230	\$271,827	1,494,732	\$0.18
2033	\$516,471	\$284,059	1,517,153	\$0.19
2034	\$539,712	\$296,842	1,539,910	\$0.19
2035	\$563,999	\$310,199	1,563,009	\$0.20
2036	\$589,379	\$324,158	1,586,454	\$0.20
2037	\$615,901	\$338,746	1,610,250	\$0.21
2038	\$643,616	\$353,989	1,634,404	\$0.22
2039	\$672,579	\$369,919	1,658,920	\$0.22
2040	\$702,845	\$386,565	1,683,804	\$0.23
2041	\$734,473	\$403,960	1,709,061	\$0.24
2042	\$767,525	\$422,139	1,734,697	\$0.24
2043	\$802,063	\$441,135	1,760,718	\$0.25
2044	\$838,156	\$460,986	1,787,128	\$0.26
2045	\$875,873	\$481,730	1,813,935	\$0.27
Total	\$11,906,000	\$6,548,300		\$4.08
			Discount Rate	4.50%
			Credit Net Present Value	\$2.55

Water

- Distribution Projects Cost per Gallon
- No issued debt

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Distribution					
Cast Iron Water Main Replacement	Project every other year + 10 new hydrants per project. (O'Brien RR Crossing)	\$4,200,000	70%	\$2,940,000	\$1,260,000
				Cash Reserves [2]	\$1,890,000
				Remaining Funding Need (Growth vs Non-Growth)	\$1,050,000
					\$0

[1] Growth's share is based on the volume increase of the O'Brien Ave. water line, 12-inch diameter increased to 18 inches

[2] Cash reserves fully funds the non-growth cost and a portion of the growth's cost

Cost Analysis

Water Distribution Projects	
Growth's Share of Distribution CIP	\$1,050,000
2035 Peak Water System Demand (gals/day)	1,563,009
Capital Cost per Gallon	\$0.67

Water

- Plant Project Cost per Gallon

Growth-Related Water Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost	
Treatment						
Water Plant Expansion	Expanded plant from 3MGD to 5MGD, addressing 0.46MGD deficiency, adding 1.54MGD in growth capacity	\$11,000,000	77%	\$8,470,000	\$2,530,000	
				Issued Debt [2]	\$8,470,000	\$2,530,000
				Remaining Funding Need (Growth vs Non-Growth)	\$8,470,000	\$2,530,000

[1] Growth's share based on added capacity 1.54MGD / 2MGD = 77 percent, AE2S June, 2023

[2] Previously issued debt which future impact fees will fund

Cost Analysis

Water Treatment Projects	
Remaining Growth's Share of the CIP	\$8,470,000
Growth-Related Capacity Expansion (gals/day)	1,540,000
Capital Cost per Gallon	\$5.50

Water

- Plant Project Credit

Year	Principal Payment	Growth Share 77%	Citywide Peak Daily Water Use (gals)	Payment per Gallon
2026	\$385,000	\$296,450	1,346,793	\$0.22
2027	\$393,000	\$302,610	1,366,995	\$0.22
2028	\$404,000	\$311,080	1,387,500	\$0.22
2029	\$415,000	\$319,550	1,408,313	\$0.23
2030	\$426,000	\$328,020	1,429,437	\$0.23
2031	\$436,000	\$335,720	1,450,879	\$0.23
2032	\$447,000	\$344,190	1,472,642	\$0.23
2033	\$458,000	\$352,660	1,494,732	\$0.24
2034	\$470,000	\$361,900	1,517,153	\$0.24
2035	\$482,000	\$371,140	1,539,910	\$0.24
2036	\$494,000	\$380,380	1,563,009	\$0.24
2037	\$507,000	\$390,390	1,586,454	\$0.25
2038	\$520,000	\$400,400	1,610,250	\$0.25
2039	\$533,000	\$410,410	1,634,404	\$0.25
2040	\$546,000	\$420,420	1,658,920	\$0.25
2041	\$86,000	\$66,220	1,683,804	\$0.04
Total	\$7,002,000	\$5,391,540		\$3.58
			Discount Rate	4.50%
			Credit Net Present Value	\$2.54

Water

- Maximum Supportable Impact Fee

Components	Cost per Gallon
Storage Projects	\$14.35
Distribution Projects	\$0.67
Water Treatment Plant	\$5.50
Gross Total	\$20.52
Credit for Future Storage Bond Payments	(\$2.55)
Credit for Future Plant Bond Payments	(\$2.54)
Net Total	\$15.44
Peak Average Gallons per EDU	215
Capital Cost per EDU	\$3,319

Demand per EDU has decreased – 23%
Admin fee removed – 5%

Meter Size (inches)	AWWA Capacity (gal)	Weighting Factor	Maximum Supportable Fee	Current Fee	Increase/ (Decrease)
3/4	30	1.00	\$3,319	\$3,903	(\$584) -15%
1	50	1.67	\$5,543	\$6,518	(\$975) -15%
1 1/2	100	3.33	\$11,052	\$12,997	(\$1,945) -15%
2	160	5.33	\$17,690	\$20,803	(\$3,113) -15%
3	300	10.00	\$33,190	\$39,030	(\$5,840) -15%
4	500	16.67	\$55,328	\$65,063	(\$9,735) -15%
6	1,000	33.33	\$110,622	\$130,087	(\$19,465) -15%

Water

- 10-Year Revenue
 - Majority is related to storage project

Water Projection	2025	2035	10-Year Increase
Peak Daily Use (gals)	1,346,793	1,563,009	216,215

10-Year Increase in Water Demand (gals)	216,215
Peak Daily Gallons per EDU	215
10-Year Increase in EDUs	1,006

10-Year Increase in EDUs	1,006
Fee per EDU	\$3,319
10-Year Projected Impact Fee Revenue	\$3,337,761

10-Year Impact Fee Revenue	<u>\$3,337,761</u>
Total Water CIP Cost	<u>\$36,106,000</u>
Other Funding Needs	<u>\$32,768,239</u>

	Growth CIP	Portion of Revenue
Storage	\$6,598,987	\$2,552,164
Distribution	\$1,050,000	\$144,866
Plant	\$8,470,000	\$640,731
Total	\$16,118,987	\$3,337,761

Whitefish Impact Fee Study

- Water
- Wastewater
- Summary

Wastewater

- Finding the capital cost per gallon to expand infrastructure
- WW plant component
 - City using cash reserves for ww collection projects, removed from impact fee collection
- Equivalent dwelling unit (EDU) used to find proportionate demand and fee
 - Peak day gallons
- Credit included for bond payments to ensure no double payment

- Removed admin 5% for new State law

Wastewater

- Peak use has decreased 20% from 2022
- Attributed to occupancy changes and overall trend in use

Wastewater Usage (2024)	Residential Gallons	Residential Accounts	Monthly Average (gal)	Daily Average (gal)
January	10,537,200	3,684	2,860	92
February	10,943,560	3,685	2,970	102
March	8,201,680	3,693	2,221	72
April	8,913,890	3,704	2,407	80
May	8,876,200	3,707	2,394	77
June	11,707,410	3,718	3,149	105
July	14,896,530	3,719	4,006	129
August	17,036,330	3,720	4,580	148
September	14,105,810	3,725	3,787	126
October	9,605,540	3,743	2,566	83
November	8,560,980	3,740	2,289	76
December	8,506,890	3,740	2,275	73

Source: City of Whitefish Utility Billing Department

EDU Annual Daily Wastewater Use (gals) 97

EDU Peak Day Wastewater Use (gals) 148

2022 Peak Use (daily gallons) **184**

2024 Peak Use (daily gallons) **148**

Decrease in Wastewater Use **20%**

Wastewater

- 16% increase in wastewater demand

Whitefish, MT	2025 Base Year	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	Increase
Avg Daily WW Use (gallons)	839,002	851,587	864,361	877,326	890,486	903,843	917,401	931,162	945,129	959,306	973,696	134,694
Peak Daily WW Use (gallons)	1,167,615	1,185,130	1,202,907	1,220,950	1,239,264	1,257,853	1,276,721	1,295,872	1,315,310	1,335,040	1,355,065	187,450

Source: AE2S long-range planning effort (2025) projects 1.5 percent annual growth rate through 2045

Wastewater

- Collection Project
- No need to continue impact fees for collection component

Growth-Related Wastewater Capacity Projects		Total Cost	Cash Reserves [1]
Collection			
Piping - Future Capacity Enhancements	Upgrade collection mains to enhance capacity as per Wastewater Facility Plan	\$456,000	\$456,000
Sewer Main Upgrade N of Hospital - Greenwood to Columbia	Upgrade under-sized sewer mains to maintain growth	\$500,000	\$500,000
Total		\$956,000	\$956,000

[1] Wastewater CIP, cash reserves fully funding the non-growth and growth's cost

Wastewater

- Plant Project Cost per Gallon & Credit

Growth-Related Wastewater Capacity Projects		Total Cost	Growth's Share [1]	Growth's Cost	Non-Growth Cost
Treatment					
Wastewater Plant	Replaced 1.25MGD plant with 2MGD plant, adding 0.75MGD	\$26,666,410	37.5%	\$9,999,904	\$16,666,506
				Cash Reserves [2]	<u>\$5,721,410</u>
				Grants [3]	<u>\$1,020,000</u>
				Remaining Funding Need (Growth vs Non-Growth)	<u>\$9,999,904</u> <u>\$9,925,096</u>

- [1] Growth's share is based on increase in capacity 0.75MGD / 2MGD = 37.5 percent
- [2] Cash reserves funds a portion of the non-growth cost
- [3] Grants fund a portion of the non-growth cost

Cost Analysis

Water Treatment Projects	
Remaining Growth-Related Cost	\$9,999,904
Growth-Related Increase in Capacity Gals/Day	750,000
Capital Cost per Gallon	\$13.33

Wastewater

- Plant Project Credit

Wastewater Plant	Remaining Costs	Percent of Total
Growth's Cost	\$9,999,904	50%
Non-Growth Cost	\$9,925,096	50%
Total	\$19,925,000	100%

Year	Principal Payment	Growth Share 50%	Citywide Peak Daily WW Use (gallons)	Payment per Gallon
2026	\$872,000	\$436,000	1,185,130	\$0.37
2027	\$894,000	\$447,000	1,202,907	\$0.37
2028	\$916,000	\$458,000	1,220,950	\$0.38
2029	\$940,000	\$470,000	1,239,264	\$0.38
2030	\$963,000	\$481,500	1,257,853	\$0.38
2031	\$986,000	\$493,000	1,276,721	\$0.39
2032	\$1,011,000	\$505,500	1,295,872	\$0.39
2033	\$1,038,000	\$519,000	1,315,310	\$0.39
2034	\$1,064,000	\$532,000	1,335,040	\$0.40
2035	\$1,090,000	\$545,000	1,355,065	\$0.40
2036	\$1,117,000	\$558,500	1,375,391	\$0.41
2037	\$1,146,000	\$573,000	1,396,022	\$0.41
2038	\$1,175,000	\$587,500	1,416,962	\$0.41
2039	\$1,204,000	\$602,000	1,438,217	\$0.42
2040	\$916,000	\$458,000	1,459,790	\$0.31
Total	\$15,332,000	\$7,666,000		\$5.81
			Discount Rate	4.50%
			Credit Net Present Value	\$4.15

Wastewater

- Maximum Supportable Impact Fee

Components	Cost per Gallon
Wastewater Treatment Plant	\$13.33
Gross Total	\$13.33
Credit for Future Plant Bond Payments	(\$4.15)
Net Total	\$9.18
Peak Average Gallons per EDU	148
Capital Cost per EDU	\$1,359

Demand per EDU has decreased – 20%
 Removed collection component
 Admin fee removed – 5%

Meter Size (inches)	AWWA Capacity (gal)	Weighting Factor	Maximum Supportable Fee	Current Fee	Increase/ (Decrease)	
3/4	30	1.00	\$1,359	\$4,041	(\$2,682)	-66%
1	50	1.67	\$2,270	\$6,748	(\$4,478)	-66%
1 1/2	100	3.33	\$4,525	\$13,457	(\$8,932)	-66%
2	160	5.33	\$7,243	\$21,539	(\$14,296)	-66%
3	300	10.00	\$13,590	\$40,410	(\$26,820)	-66%
4	500	16.67	\$22,655	\$67,363	(\$44,708)	-66%
6	1,000	33.33	\$45,295	\$134,687	(\$89,392)	-66%

Wastewater

- Revenue doesn't overshoot growth CIP cost

Wastewater Projection	2025	2035	10-Year Increase
Peak Daily Use (gals)	1,167,615	1,355,065	187,450

10-Year Increase in WW Demand (gals)	187,450
Peak Daily Gallons per EDU	148
10-Year Increase in EDUs	1,267

10-Year Increase in EDUs	1,267
Fee per EDU	\$1,359
10-Year Projected Impact Fee Revenue	\$1,721,246

10-Year Impact Fee Revenue	<u>\$1,721,246</u>
Total Wastewater CIP Cost	<u>\$27,622,410</u>
Other Funding Needs	<u>\$25,901,164</u>

	Growth CIP	Portion of Revenue
Treatment	\$9,999,904	\$1,721,246
Total	\$9,999,904	\$1,721,246

Whitefish Impact Fee Study

- Water
- Wastewater
- Summary

Whitefish Impact Fee Study

- Utility totals

Meter Size (inches)	Water	WW	Maximum Supportable Fee	Current Fee	Increase/ (Decrease)	
3/4	\$3,319	\$1,359	\$4,678	\$7,944	(\$3,266)	-41%
1	\$5,543	\$2,270	\$7,813	\$13,266	(\$5,453)	-41%
1 1/2	\$11,052	\$4,525	\$15,577	\$26,454	(\$10,877)	-41%
2	\$17,690	\$7,243	\$24,933	\$42,342	(\$17,409)	-41%
3	\$33,190	\$13,590	\$46,780	\$79,440	(\$32,660)	-41%
4	\$55,328	\$22,655	\$77,983	\$132,426	(\$54,443)	-41%
6	\$110,622	\$45,295	\$155,917	\$264,774	(\$108,857)	-41%

Discussion

Colin McAweeney
TischlerBise

Boise, ID | 208.515.7480 | colin@tischlerbise.com

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CITY COUNCIL REGULAR MEETING AGENDA

The Following is a summary of the items to come before the City Council at its regular session to be held on Monday, January 5, 2026, at **7:10 p.m.** at City Hall 418 East Second Street, 2nd Floor
Hybrid (In-person and/or Remotely via Zoom)

To attend the meeting via Zoom and **provide live comment** attendees should go to the web link below. **Raise your virtual hand to indicate you want to provide comment. Due to occasional technical difficulties, the most reliable way to participate is through in-person attendance. Electronic/virtual means are not guaranteed.**

Meeting Link: [Zoom Link](#) Meeting Number: **849 2808 8413** Password: **59937**

NOTICE: Effective **September 15, 2025**, live streaming of meetings on YouTube will no longer be available. To watch meetings live, please use the **Zoom Link** provided above. A **recording of the meeting** will be uploaded to the City of Whitefish YouTube channel the following day.

- We encourage individuals to provide written public comment; to the City Clerk, Michelle Howke at mhowke@cityofwhitefish.org or deliver by **4:00 p.m. Monday, January 5, 2026**, to City Hall. Written comments should include name, address, should be short and concise, courteous, and polite. All written comments received by 4:00 p.m. will be provided to the City Council and appended to the packet following the meeting.
- Public comment by those attending the meeting "live" via Zoom or in-person will be limited to three minutes per individual.

Ordinance numbers start with 26-01. Resolution numbers start with 26-01

- 1) CALL TO ORDER
- 2) PLEDGE OF ALLEGIANCE
- 3) OATH OF OFFICE AND SEATING OF COUNCIL
 - a) Administration of ceremonial oath of office to three (3) City Councilors – Mayor Muhlfeld
 - b) Election of Deputy Mayor
- 4) PRESENTATION
 - a) Glacier Nordic Club: Winter Operations Storage Building at Big Mountain Trailhead (p.101)
- 5) COMMUNICATIONS FROM THE PUBLIC– (This time is set aside for the public to comment on items that are either on the agenda, but not a public hearing or on items not on the agenda. City officials do not respond during these comments but may respond or follow-up later on the agenda or at another time. The mayor has the option of limiting such communications to three minutes depending on the number of citizens who want to comment and the length of the meeting agenda)
- 6) COMMUNICATIONS FROM VOLUNTEER BOARDS
 - a) Consideration of approval of the Whitefish Lake and Lakeshore Protection Committee Letter to the County Commissioners regarding Shoreline Development Concerns (p.104)
 - b) Consideration of a request from the Whitefish Community Library Board of Trustees to appoint Trustee-in-Training (p.108)
- 7) CONSENT AGENDA (The consent agenda is a means of expediting routine matters that require the Council's action. Debate does not typically occur on consent agenda items. Any member of the Council may remove any item for debate. Such items will typically be debated and acted upon prior to proceeding to the rest of the agenda.)
 - a) Minutes from December 1, 2025, Special Session (p.112)
 - b) Minutes from December 1, 2025, Regular Meeting (p.113)
 - c) Minutes from December 15, 2025, Closed Executive Session
 - d) Minutes from December 15, 2025, Special Session (p.116)

- 8) **PUBLIC HEARINGS** (Items will be considered for action after public hearings) (Resolution No. 07-33 establishes a 30-minute time limit for applicant's land use presentations.)
- a) Consideration of a request from Whitefish School District for a Conditional Use Permit to develop an expansion of academic and athletic facilities located at 1143 E. 4th Street, zoned as WR-1 (One-Family Residential District) (WCUP 25-13) (p.119)
 - b) Consideration of a request from Little Bear Developments No 4, LLC for a Conditional Use Permit to add a Beer and Wine liquor license to expand sales at Bonsai Brewery, located at 549 Wisconsin Avenue, zoned WB-1 (Limited Commercial District) (WCUP 25-12) (p.182)
 - c) Resolution No. 26-__; A Resolution approving an increase in ambulance fees and establishing new fees for certain fire rescue services provided by the Whitefish Fire Department (p.213)
- 9) **COMMUNICATIONS FROM FIRE CHIEF**
- a) Consideration to award the consulting contract for the Community Wildfire Protection Plan and authorize the City Manager to finalize the professional services agreement (p.242)
- 10) **COMMUNICATION FROM PUBLIC WORKS DIRECTOR**
- a) Resolution No. 26-__; A Resolution authorizing the submittal of an MCEP Infrastructure Planning Grant Application (p.245)
- 11) **COMMUNICATION FROM FINANCE DIRECTOR**
- a) Review and consideration of the annual 2025 Impact Fee Report (p.249)
- 12) **COMMUNICATIONS FROM CITY MANAGER**
- a) Written report enclosed with the packet. Questions from Mayor and Council? (p.258)
 - b) Other items arising between December 31st through January 5th
 - c) Consideration of a request from Northwest Montana Community Land Trust to release the deed restriction on 714 and 610 Trailview Way and request funds from the City (p.259)
- 13) **COMMUNICATIONS FROM MAYOR AND CITY COUNCILORS**
- a) Letter from Shelter WF requesting the City Council adopt the community housing needs projections in the Shelter WF Revised Community Housing Needs Assessment (p.269)
 - b) Letter from Shelter WF response to the Agnew Beck memo regarding Whitefish Community Housing Needs Assessment Talking Points (p.280)
 - c) Letter from Terry Marasco regarding teachers and affordable housing (p.282)
 - d) Appointments of City Council to Various Board, Commissions, and Committees
 - i) Bike/Ped Path Committee – Councilor Caltabiano current designee
 - ii) Climate Action Plan Committee – Councilor Davis current designee
 - iii) Community Housing Committee – Councilor Davis current designee
 - iv) Impact Fee Advisory Committee – Councilor Caltabiano current designee
 - v) Insurance (Medical) Committee - (2) City Councilors (Ex-Officio members) Councilors Feury and Norton current designee
 - vi) Legacy Land Advisory Committee, Recreation/Conservation Committee (LLAC) – (2) City Councilors, Councilors Feury and Qunell current designee
 - vii) Whitefish Trail Operations Committee – (1) City Councilor – Councilor Feury current designee
 - viii) Montana West Economic Development Board of Directors – Councilor Caltabiano current designee
 - ix) Park Board – Councilor Sweeney current, Councilor Caltabiano alternate
 - x) Planning Commission – Councilor Sweeney, and Councilors Davis and Feury alternates
 - xi) Real Estate Advisory Committee – Mayor and Councilor Feury current designee
 - xii) Resort Tax Advisory Committee – Councilor Feury current designee

- xiii) Tree Advisory Committee – Councilor Norton current designee
- xiv) Whitefish Lake Institute – Mayor and Councilor Feury current designee

14) ADJOURNMENT (Resolution 08-10 establishes 11:00 p.m. as end of meeting unless extended to 11:30 by majority)

The City of Whitefish is partnering with North Valley Food Bank to collect food donations.

- Drop off non-perishable items in the City Hall lobby (418 E. 2nd Street) Monday–Friday, 8:00 AM–5:00 PM, or during public meetings.
- To donate money or volunteer, visit North Valley Food Bank’s website.



The following Principles for Civil Dialogue are adopted on 2/20/2007 for use by the City Council and by all boards, committees and personnel of the City of Whitefish:

- We provide a safe environment where individual perspectives are respected, heard, and acknowledged.
- We are responsible for respectful and courteous dialogue and participation.
- We respect diverse opinions as a means to find solutions based on common ground.
- We encourage and value broad community participation.
- We encourage creative approaches to engage public participation.
- We value informed decision-making and take personal responsibility to educate and be educated.
- We believe that respectful public dialogue fosters healthy community relationships, understanding, and problem-solving.
- We acknowledge, consider and respect the natural tensions created by collaboration, change and transition.
- We follow the rules and guidelines established for each meeting.

Adopted by Resolution 07-09
February 20, 2007

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December 31, 2025

The Honorable Mayor Muhlfeld and City Councilors
City of Whitefish
Whitefish, Montana



Mayor Muhlfeld and City Councilors:

Monday, January 5, 2026 City Council Agenda Report

There will be a Special Session at 5:00 p.m. to continue interviews for volunteer boards and committees. The Work Session will follow at 6:15 p.m. and will include a presentation from Tischler Bise on Impact Fees. Dinner will be provided.

The regular Council meeting will begin at 7:10pm.

PRESENTATION

- a) Glacier Nordic Club: Winter Operations Storage Building at Big Mountain Trailhead (p.101)

Information is provided in the packet giving an update on the Big Mountain Trailhead Grooming Equipment Facility.

No action is required.

COMMUNICATIONS FROM THE PUBLIC– (This time is set aside for the public to comment on items that are either on the agenda, but not a public hearing or on items not on the agenda. City officials do not respond during these comments but may respond or follow-up later on the agenda or at another time. The mayor has the option of limiting such communications to three minutes depending on the number of citizens who want to comment and the length of the meeting agenda)

COMMUNICATIONS FROM VOLUNTEER BOARDS

- a) Consideration of Approval of the Whitefish Lake and Lakeshore Protection Committee Letter to the County Commissioners Regarding Shoreline Development Concerns (p.104)

The letter to the County Commissioners is included in the packet. Staff is requesting direction or approval before it is mailed.

- b) Consideration of a request from the Whitefish Community Library Board of Trustees to appoint Trustee-in-Training (p.108)

The Whitefish Community Library Board of Trustees is requesting confirmation of appointing Dr. Moira McKinnon Linam as the Trustee-in-Training from Mayor Muhlfeld.

CONSENT AGENDA (The consent agenda is a means of expediting routine matters that require the Council's action. Debate does not typically occur on consent agenda items. Any member of the Council may remove any item for debate. Such items will typically be debated and acted upon prior to proceeding to the rest of the agenda.)

- a) Minutes from December 1, 2025, Special Session (p.112)
- b) Minutes from December 1, 2025, Regular Meeting (p.113)
- c) Minutes from December 15, 2025, Closed Executive Session

d) Minutes from December 15, 2025, Special Session (p.116)

RECOMMENDATION: Staff respectfully recommends the City Council approve the Consent Agenda.

Items “a, b, c, and d” are administrative matters.

PUBLIC HEARINGS (Items will be considered for action after public hearings) (Resolution No. 07-33 establishes a 30-minute time limit for applicant’s land use presentations.)

a) Consideration of a request from Whitefish School District for a Conditional Use Permit to develop an expansion of academic and athletic facilities located at 1143 E. 4th Street, zoned as WR-1 (One-Family Residential District) (WCUP 25-13) (p.119)

From Planner I, Lauren Macdonald’s transmittal report.

Summary of Requested Action: This is a request for a Conditional Use Permit (CUP) by Shane Jacobs, representing the Whitefish School District, proposing academic expansions and athletic facility improvements at 1143 E 4th Street. The properties are currently developed with an athletic field, associated storage facilities, and a school structure. They are zoned WR-1 (One-Family Residential District), and the Whitefish Growth Policy designates them as ‘Public/Semi-Public’.

Planning & Building Department Recommendation: Staff recommended approval of the Conditional Use Permit application subject to eleven (11) conditions set forth in the attached staff report.

Public Hearing: Shane Jacobs and Brandon Theis, the project’s designer and engineer, were present and made themselves available for inquiries from the commission. One member of the public spoke at the December 18, 2025, public hearing, inquiring about a range of topics including parking, lighting, and traffic flow – all of which Shane and Brandon addressed. The draft minutes for this item are attached as part of this packet.

Planning Commission Action: The Whitefish Planning Commission met on December 18, 2025, and considered the request. Following the hearing, the Planning Commission unanimously voted to approve the request. In making their decision, the Planning Commission adopted staff report WCUP 25-13 with Findings of Fact and recommended conditions of approval.

RECOMMENDATION: Staff respectfully recommends the City Council after considering public testimony at the Public Hearing, approve WCUP 25-13, the Findings of Fact in the staff report and recommended conditions of approval, as recommended by the Planning Commission on December 18, 2025.

This item is a quasi-judicial matter.

b) Consideration of a request from Little Bear Developments No 4, LLC for a Conditional Use Permit to add a Beer and Wine liquor license to expand sales at Bonsai Brewery, located at 549 Wisconsin Avenue, zoned WB-1 (Limited Commercial District) (WCUP 25-12) (p.182)

From Building and Planning Director Dave Taylor’s transmittal report.

Summary of Requested Action: This is a request for a Conditional Use Permit (CUP) by Little Bear Developments No 4, LLC for a Conditional Use Permit in order to add a Beer and Wine liquor license to expand sales at Bonsai Brewery to include wine and to allow them to operate past 8 p.m. The business is located at 549 Wisconsin Avenue and 635 Denver. The properties can be legally described as Lots 1,

Densin Subdivision, and Lot 2 of Half Full Subdivision, in S25 T31N R22W. The property is zoned WB-1 (Limited Commercial District).

Planning & Building Department Recommendation: Staff recommended approval of the Conditional Use Permit application subject to eight (8) conditions set forth in the attached staff report.

Public Hearing: The applicant, Daniel Wright, 28 Fairview Drive, spoke and answered questions. No other members of the public spoke at the December 18, 2025 public hearing. The draft minutes for this item are attached as part of this packet.

Planning Commission Action: The Whitefish Planning Commission met on December 18, 2025 and considered the request. Following the hearing, the Commission moved (Norton/Wurster) and voted to unanimously recommend approval of the project.

RECOMMENDATION: Staff respectfully recommend the City Council, after considering public testimony at the Public Hearing, approve WCUP 25-13, the Findings of Fact in the staff report and the eight conditions of approval, as recommended by the Planning Commission on December 18, 2025.

This item is a quasi-judicial matter.

- c) Resolution No. 26-__; A Resolution approving an increase in ambulance fees and establishing new fees for certain fire rescue services provided by the Whitefish Fire Department (p.213)

From City Manager Dana Meeker's staff report.

Background

The Whitefish Fire Department (WFD) provides ambulance service for city residents and non-residents within the WFD's emergency medical response area that extends beyond the city limits. The WFD also provides mutual aid in other areas of Flathead County when available to respond. For ambulance calls outside the city limits, the City is provided with a small response fee from the Flathead County EMS levy, however, most of the cost of the call is covered by the charges for services billed by the City.

In December 2016, the City Council adopted Resolution No. 16-62, which increased ambulance fees and provided automatic increases on July 1, 2017, July 1, 2018, and July 1, 2019. The automatic increases were based on the same percentage as the 12-month percentage increase, if any, in the U.S. All Urban Consumers - Medical Care Services (Consumer Price Index) for the period ending each December preceding the scheduled fee increase. While this approach maintained reasonable and equitable fees through Fiscal Year 2020, no additional rate adjustments have been made since July 1, 2019.

On March 4, 2024, the City Council awarded a contract to Baker Tilly in the amount of \$27,500 to complete an ambulance and fire rescue rate study. In May 2025, Baker Tilly presented the final Fire/EMS Cost of Services Report to the City Council. After the presentation, the City Council directed staff to schedule a public hearing and prepare recommended fee adjustments, ideally lower than those recommended by the consultant.

Current Report

While preparing the proposed ambulance fee increase and new fees for certain fire rescue services, staff closely reviewed the consultants' recommended ambulance rates and other fees for fire rescue services that would result in a 21% to 67% increase depending on the type of response. As noted in the Fire/EMS Cost of Services Report, and as recommended in the 2021 Whitefish Fire Department Master Plan, the consultants increased the fees to provide a 28% to 35% collectability rate. Generally, the WFD has recognized a 49% to 59% collectability rate depending on the year and services provided.

The proposed ambulance fee increase is not adjusted to meet the recommended collectability rate of 28% - 35%. Additionally, staff calculated the proposed adjustments by applying the Consumer Price Index over the past six years to the rates set on July 1, 2019, to see how they would compare. These changes reduced the increase to 22%, equaling roughly 3.6% each year for the past six years. Below is a breakdown of the current ambulance fees, consultants' recommended fees, and proposed fees:

	Current Fees	Consultant Recommended Fees	% Increase	Proposed Fees Effective 2/1/26	% Increase
Residents					
BLS Emergency	\$1,070	\$1,691	58%	\$1,304	22%
ALS Emergency	\$1,257	\$1,787	42%	\$1,531	22%
Treat No Transport	\$ 441	\$ 652	48%	\$ 538	22%
Mileage	\$ 25	\$ 35	42%	\$30.33	22%
Non-Resident					
BLS	\$1,363	\$2,270	67%	\$1,660	22%
ALS	\$1,549	\$2,431	57%	\$1,887	22%
Treat No-Transport	\$ 671	\$ 813	21%	\$ 818	22%
Mileage	\$24.90	\$35.36	42%	\$30.33	22%

The new recommended fees include fire responses to automobile accidents, other events where medical services are provided by the fire response personnel, and fire responses to gas leaks. For responses to automobile accidents and other incidents where fire personnel provide medical evaluation and treatment, an hourly rate is recommended with the minimum charge equaling one hour. This allows for more equitable charging based on the duration the fire response personnel are on the scene of an accident or emergency. Staff also compared the recommendations from the consultants to the allowed hourly reimbursable rate from the Montana DNRC for wildfire response. The \$350 per hour rate is based on the reimbursement rates set by the State for the equipment and personnel and is reasonably close to, but does not exceed, the actual costs calculated by the consultant.

Fire responses to gas leaks is a flat rate fee that was also recommended by the consultants. The intention of this fee is to further deter contractors or other individuals from not calling U-Dig prior to excavating and damaging gas lines. The gas leak response fees are proposed at cost based on the consultants' recommendations without the adjustment for a collectability rate of 28% to 35%.

As with ambulance services, the new fees are proposed to vary by residency status due to the property taxes paid by residents and property owners in city limits. Below is a chart comparing the consultants' recommended fees and the proposed fees:

	Consultant Recommended Fees	Proposed Fees Effective 2/1/26
Residents		
Automobile Accidents: Initial Response (1 hr.)	\$1,124	\$350
Automobile Accidents: Additional per hour rate after initial response	<i>Included in Initial Response Rate</i>	\$350/Hour

Fire Medical Eval/Treatment	\$1,124	\$350/Hour
Gas Leaks (includes WFSA)	\$1,725	\$1,294
Non-Resident		
Automobile Accidents: Initial Response (1 hr.)	\$1,146	\$357
Automobile Accidents: Additional per hour rate after initial response	<i>Included in Initial Response Rate</i>	\$357/Hour
Fire Medical Eval/Treatment	\$1,146	\$357/Hour
Gas Leaks (includes WFSA)	\$4,728	\$3,546

The proposed rates are also recommended to automatically increase like the approach taken by the City Council in 2016. This will ensure that the fees charged for service reasonably keep up with increasing costs.

When considering fee increases, it is also important to consider what other jurisdictions charge for similar services. However, caution should be exercised when drawing conclusions simply based on comparative data as the type of qualifications required of firefighters, the population served, and services offered may differ by entity. Attached to this report is a comparison chart. While Whitefish will have some of the highest fees, most of the comparative data available were rates adopted in prior years.

Financial Requirements

Ambulance fees have not been adjusted since July 1, 2019. Therefore, property taxes have continued to support not only fire response and rescue, but also ambulance services provided by the WFD. With increasing costs to provide services each year, such as personnel, training, supplies, and equipment, an average 3.6% increase per year is fair and reasonable. Even with this increase, there will still be a required contribution from property taxes, especially for fire response and rescue.

The Fiscal Year 2026 Budget assumed an increase in charges for services for ambulance services. Based on the recommended fee increase and collectability assumed to remain steady around 50%, the City could generate about \$175,000 more each year for ambulance services. The new fire rescue fees would generate new revenue that is not accounted for in the Fiscal Year 2026 Budget.

RECOMMENDATION: Staff respectfully recommends the City Council, after considering public testimony at the Public Hearing, adopt Resolution No. 26-__; A Resolution approving an increase in ambulance fees and establishing new fees for certain fire rescue services provided by the Whitefish Fire Department.

This item is an administrative issue.

COMMUNICATIONS FROM FIRE CHIEF

- a) Consideration to award the consulting contract for the Community Wildfire Protection Plan and authorize the City Manager to finalize the professional services agreement (p.242)

From Fire Chief Cole Hadley’s staff report.

INTRODUCTION

The City of Whitefish issued a Request for Proposals (RFP) on October 22, 2025, seeking a qualified consultant to complete the Community Wildfire Protection Plan (CWPP) update. The CWPP will guide the City’s wildfire risk reduction efforts and support compliance with the Montana Land Use Planning Act. The consultant selection process followed the Rating Panel and Selection Panel structure previously approved by Council.

SELECTION PROCESS

Rating Panel Review

The Rating Panel—Fire Chief, Deputy Fire Chief, and City Manager—reviewed all submitted proposals. Finalists were identified based on experience, approach to wildfire planning, and ability to meet the project timeline.

Selection Panel Interviews

The Selection Panel—Fire Chief, Deputy Fire Chief, City Manager, and Councilor Sweeney conducted structured interviews with the top-ranked firms. Evaluation criteria focused on technical expertise, familiarity with CWPP development, and overall fit with Whitefish’s needs.

The City of Whitefish received RFPs from eight (8) consulting firms and through the review process five (5) were selected for interviews.

- DJ&A
- SWCA
- Bintel Inc.
- MC Fire
- Choleta

Following the interviews, the Selection Panel reached consensus that the most qualified firm was SWCA Environmental Consultants.

FINANCIAL IMPACT

The City’s FY26 Adopted Budget appropriates \$100,000 for updates to the Community Wildfire Protection Plan (CWPP). The budget anticipates use of ProHousing Grant funds awarded to the State of Montana in partnership with the Montana League of Cities and Towns to support community compliance with the Montana Land Use Planning Act (MLUPA). The proposed budget from SWCA Environmental Consultants for development and implementation of the CWPP is \$87,364.73, which is within the amount appropriated. An estimated project completion timeline will be finalized as part of the contract scope.

RECOMMENDATION: Staff respectfully recommends the City Council award the consulting contract for the Community Wildfire Protection Plan to SWCA Environmental Consultants and authorize the City Manager to negotiate the contract.

This item is an administrative matter.

COMMUNICATION FROM PUBLIC WORKS DIRECTOR

- a) Resolution No. 26-__; A Resolution authorizing the submittal of an MCEP Infrastructure Planning Grant Application (p.245)

From Public Works Director Craig Workman’s staff report.

Introduction/History

The City of Whitefish has complex wastewater collection system including 60 miles of sewer main and 16 lift stations. Portions of the system are over 100 years old. With the wide array of groundwater and surface water sources throughout the service area, the system experiences large increases of clear water flows. This extraneous flow, termed infiltration and inflow, or I&I, can overload the capacity of the collector pipes and reduce the treatment capabilities of the wastewater treatment facilities.

We experience an estimated 80 MG of clear water I&I per year. System components, including old gravity collection pipes, failing services, and illegal sump pump connections, coupled with precipitation, snowmelt, and high groundwater, result in I&I impacts that amount to over half of the WWTP influent flow during certain times of the year.

Current Report

The City has been notified by DEQ that a Preliminary Engineering Report specific to I&I reduction will be required. The proposed PER must identify needed improvements to the City's collection system to address I&I. The final report will represent the highest priority and best long-term activity to protect the public's health and safety, while ensuring Whitefish can continue to flourish economically.

In order to move forward with the PER, the City has hired HDR to assist with an application for a planning grant through the Montana Coal Endowment Program (MCEP).

Financial Requirement

The estimated total cost of PER is \$80,000. The proposed funding plan is as follows:

MCEP Grant	\$30,000
<u>Local Commitment</u>	<u>\$50,000</u>
TOTAL	\$80,000

Local funds are included in the approved FY26 budget.

RECOMMENDATION: Staff respectfully recommends the City Council adopt Resolution No. 26-___; A Resolution authorizing the submittal of an MCEP Infrastructure Planning Grant Application.

This item is an administrative matter.

COMMUNICATION FROM FINANCE DIRECTOR

- a) Review and consideration of the annual 2025 Impact Fee Report (p.249)

Finance Director Lanie Gospodarek has provided the full annual Impact Fee Report in the packet.

RECOMMENDATION: Staff respectfully recommends the City Council review and adopt the annual 2025 Impact Fee report.

This item is an administrative matter.

COMMUNICATIONS FROM CITY MANAGER

- a) Written report enclosed with the packet. Questions from Mayor and Council? (p.258)
- b) Other items arising between December 31st through January 5th
- c) Consideration of a request from Northwest Montana Community Land Trust to release the deed restriction on 714 and 610 Trailview Way and request funds from the City (p.259)

From City Manager Dana Meeker's staff report.

Background

In June of 2018, the City Council approved the Trail View Preliminary Plat and Planned Unit Development (PUD) to develop 58 single-family homes on property at the corner of Monegan and Voerman Roads. The developer offered to deed restrict all units for local workers, with the sale price controlled by the Whitefish Housing Authority or the City's Housing Coordinator, making the development the City's most significant affordable housing development to date. The Trailview PUD

was subsequently amended to clarify that only 50% of the units had purchase restrictions based upon income and then later amended to allow the developer to sell 10 units at market rate.

To date, the City Council has approved requests from the Northwest Montana Community Land Trust (NWMTCCLT) to release the City’s deed restrictions on eleven homes in the Trailview neighborhood, which have been replaced with the NWMTCCLT’s ground lease. The City Council also approved \$350,000 to assist the NWMTCCLT with the purchase of land under nine of the eleven homes.

Current Report

The NWMTCCLT has the opportunity for two additional homes at 610 and 714 Trailview Way to be added to their inventory (resale) and is requesting the release of the City’s deed restriction, which will be replaced with the NWMTCCLT ground lease to preserve the affordability of the home.

Additionally, the NWMTCCLT is requesting \$80,000 in funding to assist with the purchase of land under the two homes, \$40,000 each. It is anticipated that 610 and 714 Trailview Way will be sold to households making below 140% Area Median Income (AMI) which is within the range of AMI as required by the ground lease.

Below is a list of properties that are or will be a part of the NWMTCCLT inventory if the current request is approved:

Address	Status	Approved or Requested City Contribution
406 Trailview Way	Sold – 2023	\$0
715 Trailview Way	Sold – 2023	\$0
508 Trailview Way	Sold – 2024	\$30,000
611 Trailview Way	Sold – 2024	\$30,000
303 Trailview Way	Sold – 2024	\$30,000
307 Trailview Way	Sold – 2024	\$30,000
717 Trailview Way	Sold – 2024	\$30,000
711 Trailview Way	Sold – 2024	\$30,000
511 Trailview Way	Sold – 2025	\$30,000

Letters provided by NWMTCCLT are included in the packet, as well as the proposed agreement if City Council approves the request.

Financial Requirements

The estimated appropriation currently available in the Affordable Housing Fund for FY26 is \$569,654. Of the available amount, \$201,109 is committed to the Alpenglow II project, \$6,000 is committed for an ADU built under the former Rent Local ADU program, \$40,000 was approved from 410 Trailview Way, and \$200,000 is committed for the Whitefish Workforce Rental Program. If the City Council supports the \$80,000 request by the NWMTCCLT, approximately \$42,545 would still be available for other housing programs and initiatives through June 30, 2026.

RECOMMENDATION: Staff respectfully recommends the City Council approve the request from NWMTCCLT to contribute \$80,000 from the City’s Affordable Housing Fund to facilitate the purchase of 610 Trailview Way and 714 Trailview Way, replace the existing deed restrictions with the NWMTCCLT Ground Lease, and authorize the City Manager to execute the Seventh Agreement between the City of Whitefish and the NWMTCCLT.

COMMUNICATIONS FROM MAYOR AND CITY COUNCILORS

- d) Letter from Shelter WF requesting the City Council adopt the community housing needs projections in the Shelter WF Revised Community Housing Needs Assessment (p.269)
- e) Letter from Shelter WF response to the Agnew Beck memo regarding Whitefish Community Housing Needs Assessment Talking Points (p.280)
- f) Letter from Terry Marasco regarding teachers and affordable housing (p.282)
- g) Appointments of City Council to Various Board, Commissions, and Committees
 - i) Bike/Ped Path Committee – Councilor Caltabiano current designee
 - ii) Climate Action Plan Committee – Councilor Davis current designee
 - iii) Community Housing Committee – Councilor Davis current designee
 - iv) Impact Fee Advisory Committee – Councilor Caltabiano current designee
 - v) Insurance (Medical) Committee - (2) City Councilors (Ex-Officio members) Councilors Feury and Norton current designee
 - vi) Legacy Land Advisory Committee, Recreation/Conservation Committee (LLAC) – (2) City Councilors, Councilors Feury and Qunell current designee
 - vii) Whitefish Trail Operations Committee – (1) City Councilor – Councilor Feury current designee
 - viii) Montana West Economic Development Board of Directors – Councilor Caltabiano current designee
 - ix) Park Board – Councilor Sweeney current, Councilor Caltabiano alternate
 - x) Planning Commission – Councilor Sweeney, and Councilors Davis and Feury alternates
 - xi) Real Estate Advisory Committee – Mayor and Councilor Feury current designee
 - xii) Resort Tax Advisory Committee – Councilor Feury current designee
 - xiii) Tree Advisory Committee – Councilor Norton current designee
 - xiv) Whitefish Lake Institute – Mayor and Councilor Feury current designee

ADJOURNMENT

Sincerely,

Dana M. Meeker, CPA
City Manager

PARLIAMENTARY MOTIONS GUIDE

Based on Robert's Rules of Order Newly Revised (11th Edition) and www.jimslaughter.com

The motions below are listed in order of precedence. Any motion can be introduced if it is higher on the chart than the pending motion.

PRIVILEGED MOTIONS							
YOU WANT TO:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?	RECONSIDER?
Adjourn	I move to adjourn	No	Yes	No	No	Majority	Yes
Take a break	I move to recess for	No	Yes	No	Yes	Majority	No
Register complaint	I rise to a question of privilege	Yes	No	No	No	None	No
Orders of the day	I call for the orders of the day	Yes	No	No	No	None	No

SUBSIDIARY MOTIONS							
YOU WANT TO:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?	RECONSIDER?
Lay aside temporarily	I move to lay the question on the table	Yes	Yes	No	No	Majority	Negative vote only
Close debate	I move the previous question	No	Yes	No	No	2/3	Yes
Limit / extend debate	I move that debate be limited to...	No	Yes	No	Yes	2/3	Yes
Postpone to a certain time	I move to postpone the motion to...	No	Yes	Yes	Yes	Majority	Yes
Refer to a committee	I move to refer the motion to...	No	Yes	Yes	Yes	Majority	Yes
Amend a motion	I move to amend the motion by...	No	Yes	Yes	Yes	Majority	Yes
Kill main motion	I move that the motion be postponed indefinitely	No	Yes	Yes	No	Majority	Affirmative vote only

MAIN MOTIONS

YOU WANT TO:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?	RECONSIDER?
Bring business to motion	I move that (or “to”) ...	No	Yes	Yes	Yes	Majority	Yes

No order of precedence. Arise incidentally and decided immediately.

INCIDENTAL MOTIONS

YOU WANT TO:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?	RECONSIDER?
Enforce rules	Point of order	Yes	No	No	No	None	No
Submit matter to assembly	I appeal from the decision of the chair	Yes	Yes	Varies	No	Majority	Yes
Suspend rules	I move to suspend the rules which...	No	Yes	No	No	2/3	No
Avoid main motion altogether	I object to the consideration of the question	Yes	No	No	No	2/3	Negative vote only
Divide motion / question	I move to divide the question	No	Yes	No	Yes	Majority	No
Demand rising vote	I call for a division	Yes	No	No	No	None	No
Paliamentary law question	Parliamentary inquiry	Yes (if urgent)	No	No	No	None	No
Request information	A point of information , please.	Yes (if urgent)	No	No	No	None	No

No order of precedence. Introduce only when nothing else pending.

RENEWAL MOTIONS

YOU WANT TO:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?	RECONSIDER?
Take matter from table	I move to take from the table...	No	Yes	No	No	Majority	No
Cancel or change previous action	I move to rescind / amend the motion...	No	Yes	Yes	Yes	2/3 or majority w/notice	Negative vote only
Reconsider motion	I move to reconsider the vote on...	No	Yes	Varies	No	Majority	No

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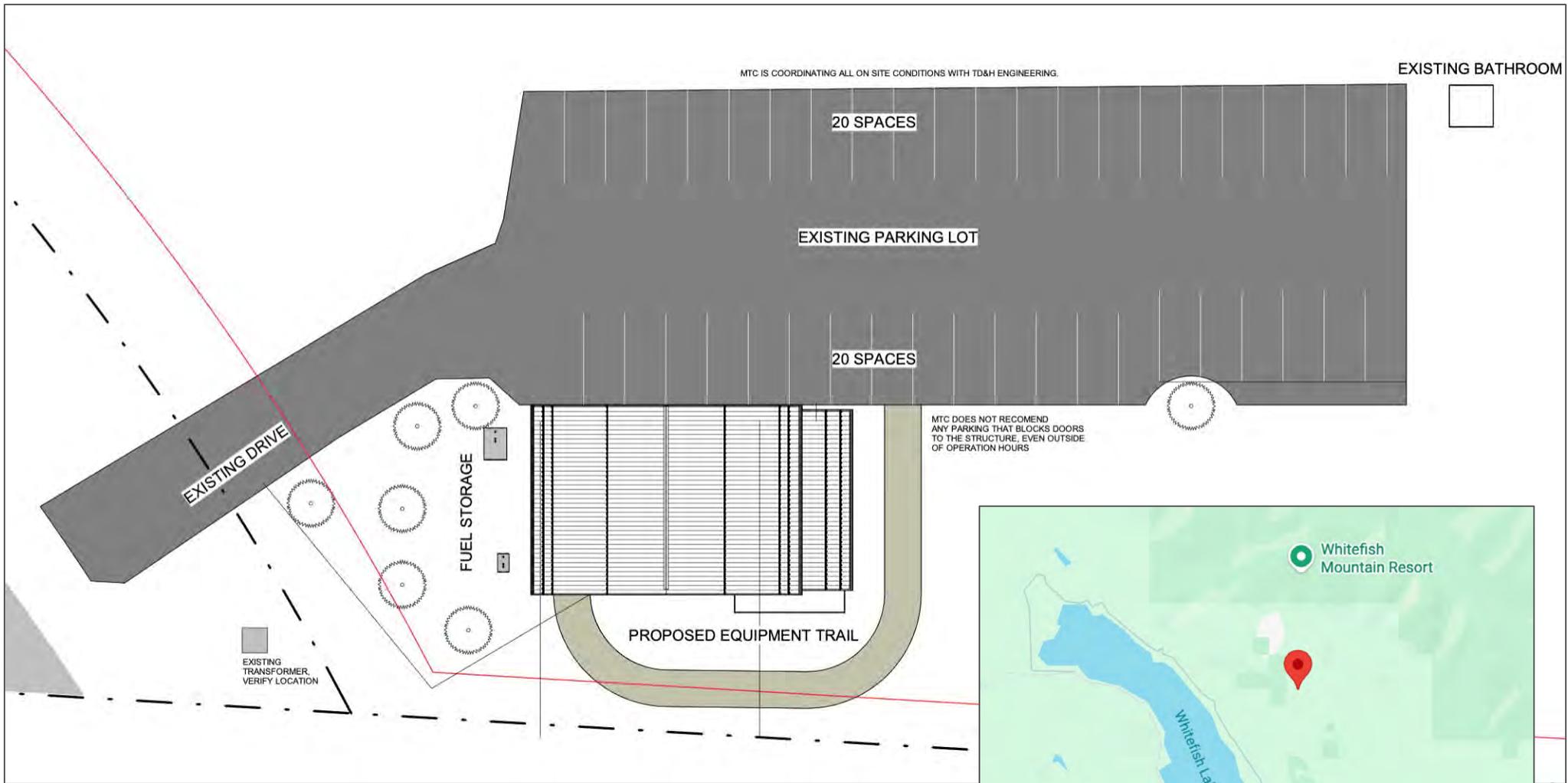


Update on Big Mountain Trailhead Grooming Equipment Facility (“Barn”)

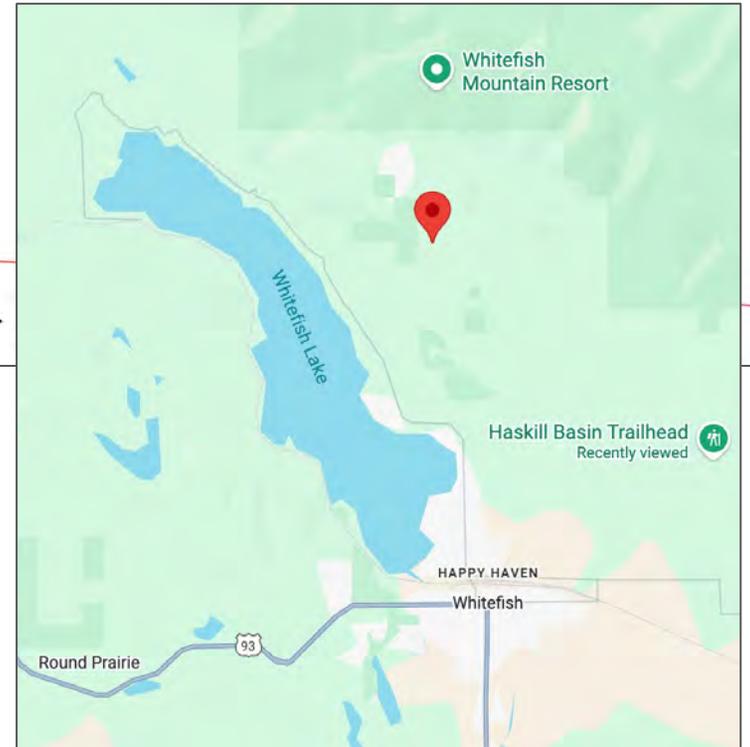
- GNC has worked with Montana Creative Architects, A2Z Engineering, and TD&H Engineering to produce engineered plans.
- Big Mountain Design Review Board has approved the building’s overall aesthetic and location.
- City’s Legacy Lands Advisory Committee has approved the building’s overall aesthetic and location.
- City Legal Counsel is working with GNC on standard construction and lease agreements.
- GNC is contacting contractors for pricing and is assembling funding from in-hand savings, grants, and private donations.
- Construction is planned for 2026/2027.

If you have any questions, comments, or interest in this project, please contact:

Jennie Bender - GNC Executive Director - jennie@glaciernordicclub.org
Justin Van Emmerik - GNC Board Member and Committee Lead - jvanemmerik@gmail.com



Draft Site Plan
3315 Big Mountain Rd



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418 East 2nd Street · PO Box 158 · Whitefish, MT 59937
(406) 863-2410 · Fax: (406) 863-2409
www.cityofwhitefish.gov



RE: Concerns Regarding Shoreline Development on
Whitefish Lake

Dear Commissioners,

On behalf of the Whitefish Lakeshore Protection Committee, we are writing to respectfully bring to your attention two properties currently under development along the shoreline of Whitefish Lake, both outside the City's lakeshore jurisdiction:

- **776 LM Beach Lane**
- **2786 Rest Haven Drive**

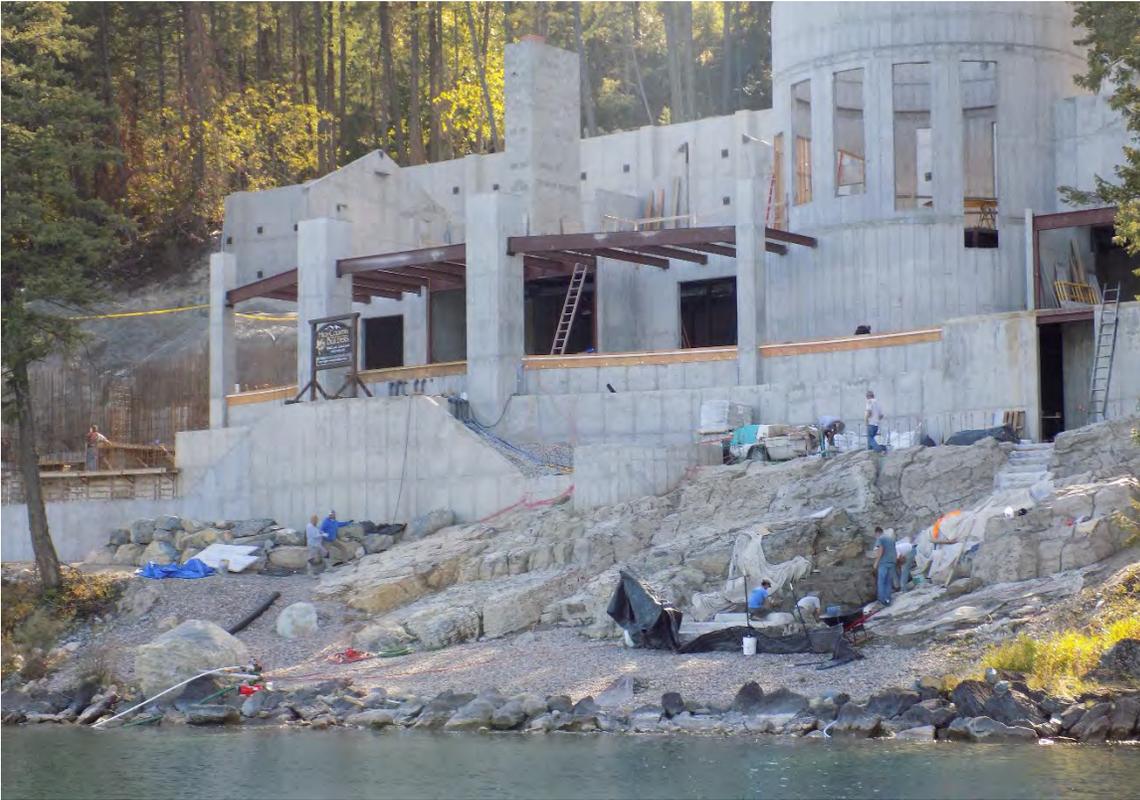
While we recognize that these properties fall under county oversight, our committee remains committed to the health and stewardship of the entire lake environment. As development progresses at these sites, we have observed changes to the shoreline that raise questions about compliance with Flathead County's lakeshore protection regulations.

At **776 LM Beach Lane**, we are aware of a shoreline disturbance in 2024 reportedly involving the use of explosives that resulted in large boulders entering the lake. While we do not have full details regarding the current scope of construction or any follow-up actions taken, the site continues to draw attention due to its scale, visibility, and potential impact on the lake environment. The images below demonstrate changes to the lakeshore.

- **Spring 2008:** Undeveloped lot with dense vegetation. Lake at high-water level.



- **Fall 2025:** Wet concrete poured within the Lakeshore Protection Zone (LPZ) to form steps.



At **2786 Rest Haven Drive**, we observed the construction of a retaining wall that appears inconsistent with county policy governing “Retaining Walls and Rip Rap.” County regulations state that retaining walls should be considered only as a last resort to address active shoreline erosion, must follow the natural contour of the shoreline, and be built at or landward of the mean annual high-water elevation. From our recent boat tour, we noted that this installation sits within the lakeshore protection zone and slightly above the current water level. During windy conditions and boat traffic, waves were observed crashing directly against the wall — a significant concern given the unusually low water this season. If this is occurring now, we have even greater concern for redirected wave action during peak summer boating activity when water levels are higher, which could negatively impact neighboring properties. We also observed no erosion control measures in place, raising concerns about sedimentation and environmental impact. It appears the wall was built not for permissible reasons such as erosion control, but for the impermissible reason of extending the land area into the lake.

To illustrate the change in shoreline condition, we've included two photographs prior to the installation of the foundation wall:

- **Summer 2024:** The lot as a residence with a boat house and there is visible rip rap along the lakeshore and surrounding vegetation serving as erosion control.



- **Fall 2025:** The site under development, showing dry soil/fill, two remaining trees, a retaining wall spanning the entire lakeshore frontage, and no erosion control measures in place, such as silt fencing.



We are further concerned about the broader implications of retaining walls, including redirected wave energy that may contribute to erosion on neighboring properties, disruption of the lake's visual character, and impacts on lakebed dynamics. Additionally, it appears that the new lower house foundation wall at this site sits inside the Lakeshore Protection Zone, which raises even greater concern.

In addition to these concerns, we'd like to emphasize that Whitefish Lake serves as the source of drinking water for our community. This underscores the importance of ensuring that all development around the lake complies with the County's adopted regulations. Protecting water quality and shoreline integrity is not only an environmental priority but a public health one as well.

We respectfully request that the County review both properties to ensure that all shoreline development activities are in compliance with applicable regulations and environmental safeguards. Our intent is to protect and maintain the ecological integrity of Whitefish Lake through collaborative stewardship and consistent environmental safeguards. We also hope to establish ongoing communications or periodic touchpoints with both the County and the City to support shared understanding and coordination on lakeshore development issues.

Thank you for your time and attention to this matter.

Sincerely,

Whitefish Lake and Lakeshore Protection Committee

John Muhlfeld Mayor, City of Whitefish

On behalf of the Whitefish City Council

Cc: Water Resource Planner, Flathead County

Planning & Zoning Director, Flathead County



December 19, 2025

City of Whitefish – City Council

Attn: The Hon. Mayor John Muhlfeld / City Councilors
418 E 2nd Street
Whitefish, MT 59937

RE: Appointment of Applicant for Whitefish Community Library (WCL) Trustee-in-Training Position

Dear Mayor Muhlfeld and Whitefish City Councilors:

The Whitefish Community Library (WCL) Board of Trustees respectfully recommends the appointment of an alternate trustee to fill the Board's Trustee-in-Training position. Our previous Trustee-in-Training, Gail Lenord, transitioned to a full Trustee upon the expiration of Sarah Ericson's term in 2024. Our other previous Trustee-in-Training, David Wiley, transitioned to a full Trustee effective upon Trevor Gonser's term expiration June 30, 2025. At this time we are recommending one Trustee-in-Training position to be filled immediately.

We are pleased to report an outstanding applicant for this position and would like to recommend approval of the following candidate:

- **Dr. Moira McKinnon Linam**, whose professional background is in Child and Adolescent Psychiatry (please see her attached application letter).

We could not have asked for a better applicant for this position and are so grateful for her interest and willingness to support the Whitefish Community Library. We feel she will be a superb addition to our Board.

As you may recall, the WCL Board of Trustees and the City Council previously worked collaboratively to amend the Board's structure and bylaws to establish a Trustee-in-Training program. This was modeled on the Missoula Library Board of Trustees' extremely successful Trustee installment process, which has been in force for almost 20 years. Consistent with the WCL Board's Bylaws, the WCL Board interviews potential applicants for the Trustee-in-Training candidates and recommends appointments to the Mayor. Appointees may serve for up to a year or more as non-voting members, gaining experience and institutional knowledge before transitioning into full Trustee roles as vacancies occur. Given the statutory limitation on Board size and the importance of continuity and experience, this process benefits both the Library and the City.

Accordingly, we respectfully request that Dr. Moira McKinnon Linam be appointed to the Trustee-in-Training position and that her transition to a full Trustee be confirmed effective upon the first Trustee vacancy. At this

time, Dr. Linam would most likely transition into Jessica Tubbs' seat upon the expiration of that term on June 30, 2026, unless another vacancy occurs sooner. This approach will help minimize Board vacancies, avoid potential quorum issues, and allow the Board to proceed promptly with advertising and interviewing for future Trustee-in-Training positions. As Montana Code Annotated limits the Board to five trustees, maintaining a consistent quorum is critical to our ongoing operations.

We deeply appreciate the continued support of the Mayor, City Council, and City staff for the care and operation of the Whitefish Community Library. Thank you for your consideration.

Sincerely,

/s/ Kelly Peppmeier

Kelly Peppmeier, Chair
Board of Trustees
Whitefish Community Library

cc: WCL Vice Chair Jessic Tubbs
Mary Drew Powers
Dana Smith
Michelle Howke

Dr. Moira McKinnon Linam

[REDACTED]
Whitefish, MT 59937

[REDACTED]
[REDACTED]
09/30/25

Ms. Mary Drew Powers

Whitefish Community Library
9 Spokane Avenue
Whitefish, MT 59937

Dear Ms. Powers and members of the Board,

I am writing to express my sincere interest in becoming a trustee-in-training on the Whitefish Community Library Board of Trustees. The Library holds a special place in our town as both a resource and a refuge. It's an inclusive place, where learning, curiosity and connection are welcome and encouraged. I believe that a well-supported library fosters individual growth and also strengthens the fabric of the entire community. I would be honored to contribute my time, skills, and perspective to furthering the library mission.

If given the opportunity to join the Board of Trustees, I am committed to collaborating with fellow members and library leadership to ensure the library remains responsive to the evolving needs of our growing community. I also welcome the chance to help shape the library's future direction and ensure its long-term sustainability. My professional background in Child and Adolescent Psychiatry and my experience serving on the Kalispell Montessori Elementary School Board have equipped me with knowledge and skills in conflict mediation, strategic planning, governance and public outreach. I believe these skills would allow me to contribute meaningfully to the stewardship of the library.

Thank you for considering my application. Please feel free to contact me by phone or email at your convenience for further discussion.

Sincerely,

Moira McKinnon Linam, MD

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WHITEFISH CITY COUNCIL
December 1, 2025
SPECIAL SESSION AT 5:30 PM

1) Call to Order

Mayor Muhlfeld called the meeting to order. Councilors present were Feury, Qunell, and Sweeney. Councilors Caltabiano, Davis and Norton were absent. Staff present were City Manager Smith, City Clerk Howke, City Attorney Jacobs, Planning and Building Director Taylor and Planner Macdonald.

2) Interviews – Planning Commission

The City Council interviewed incumbents Jon Heberling, Toby Scott and Whitney Beckham, and new applicants Luca Welle, Mike Jopek and Marti Brandt for the three positions on the Planning Commission that term December 31, 2025.

Mayor Muhlfeld recessed the meeting at 7:01pm to open the regular meeting scheduled for 7:10pm.

Mayor Muhlfeld reconvened the Special Session at 8:12pm after the regular meeting was adjourned.

Council interviewed Keegan Siebenaler and Mike Hein, also for the Planning Commission.

3) Public Comment

None

4) Appointment

Councilor Sweeney made a motion to reappoint Toby Scott and Whitney Beckham to the Planning Commission. Councilor Qunell stated he will not reappoint Toby Scott and suggested making separate motions for the three positions.

Councilor Sweeney made a motion, seconded by Councilor Norton to reappoint Whitney Beckham to the Planning Commission. The motion failed on a tie vote, Mayor Muhlfeld voting in opposition.

Councilor Qunell made a motion, seconded by Councilor Norton to appoint Mike Hein and Marti Brandt (county representative). The motion carried on a 4-2 vote, Councilors Sweeney and Davis voting in opposition.

After much discussion, and comments made by staff, Councilor Sweeney made a motion, seconded by Councilor Norton to reappoint Whitney Beckham to the Planning Commission. The motion carried.

5) Adjourn

Mayor Muhlfeld adjourned the meeting at 8:52 p.m. and opened the work session.

Mayor Muhlfeld

Attest:

Michelle Howke, Whitefish City Clerk

WHITEFISH CITY COUNCIL

December 1, 2025

7:10 P.M.

1) CALL TO ORDER

Mayor Muhlfeld called the meeting to order. Councilors present were Qunell, Feury, Caltabiano, Davis, Sweeney, and Norton. City Staff present were, City Clerk Howke, City Manager Smith, City Attorney Jacobs, Finance Director Gospodarek, Planning and Building Director Taylor, Public Works Director Workman, Parks and Recreation Director Butts, Police Chief Kelch and Fire Chief Hadley. Approximately 23 people were in the audience and 8 attended virtually.

2) PLEDGE OF ALLEGIANCE

Mayor Muhlfeld asked Matt Boyer to lead the audience in the Pledge of Allegiance.

3) PRESENTATION ([YouTube Video 1:00](#))

a) [Habitat for Humanity](#) (p.36)

MaryBeth Morand, Habitat for Humanity of Flathead Valley Executive Director, and Garrett Roberson, Construction Manager gave a presentation on the current status of the foundation. They hope to be able to work with Whitefish in the future. A copy of their presentation is provided in the packet on the website.

4) PROCLAMATION ([YouTube Video 46:42](#))

a) [Arbor Day](#) – April 24, 2026 (p.56)

Mayor Muhlfeld moved this agenda item to be read after Communications from the City Manager.

5) COMMUNICATIONS FROM THE PUBLIC– (This time is set aside for the public to comment on items that are either on the agenda, but not a public hearing or on items not on the agenda. City officials do not respond during these comments but may respond or follow-up later on the agenda or at another time. The mayor has the option of limiting such communications to three minutes depending on the number of citizens who want to comment and the length of the meeting agenda)

([YouTube Video 28:41](#))

“Z” addressed the Council, urging members to demonstrate moral courage by scheduling a public hearing to consider designating the pride flag as the official flag of the City of Whitefish. She referenced studies showing that welcoming communities reduce suicide risk among LGBTQIA+ individuals and noted that the Whitefish School District Board of Trustees cannot adopt related policies until Council action is taken.

She expressed concern about the lack of response from most Council members, acknowledged Councilor Norton’s support, and commented on remarks made by Councilors Sweeney and Qunell. In closing, she encouraged each Council member to reflect on whether they stand with exclusionary voices or with liberty and justice for all.

Cameron Blake, 825 Leksand Trail, emphasized the need for affordable workforce ownership housing in the community. She referenced the Housing Committee’s needs assessment, noting a requirement for 47 units between 50–80% AMI over the next 10 years. Blake shared her volunteer experience with Habitat for Humanity, highlighting their professionalism, capacity, and potential role in addressing housing needs. She encouraged the Council to identify land for Habitat or similar organizations, consider an RFP

process, and engage builders with proven experience in affordable housing to ensure city lots are developed to meet community needs.

Jamie Goguen, 117 Washington Avenue, expressed support for Cameron Blake's comments and praised Habitat for Humanity's role in creating housing solutions. She also shared ideas for enhancing community life during winter months, emphasizing the importance of public spaces that foster joy, connection, and mental well-being. Goguen described examples such as winter cinema at Depot Park, community skating at City Beach, and proposed the concept of an ice ribbon along the shoreline. She encouraged the Council to consider creative, low-cost approaches to winter placemaking that celebrate the season and strengthen community bonds.

Nathan Dugan, 937 Kalispell Avenue, commented on the Council's interviews and upcoming appointments, noting the opportunity to select qualified applicants who represent a broad demographic spectrum. He encouraged the Council to consider aligning the demographics of the Planning Commission more closely with those of the community, citing data on age and gender distribution in Whitefish. Dugan emphasized the importance of the Planning Commission's ongoing role in land use planning and long-term community development. He expressed concern that younger residents often feel unsupported or unheard, which can lead them to leave Whitefish permanently. He urged the Council to consider how its decisions impact the ability of people in their 20s and 30s to establish a life in the community, stressing the importance of representation and inclusivity for the city's future longevity.

6) COMMUNICATIONS FROM VOLUNTEER BOARDS

- a) **Direction** to the Whitefish Lake and Lakeshore Protection Committee on Draft Letters to County Commissioners Regarding Shoreline Development Concerns (p.58) ([YouTube Video 40:06](#))

Toby Scott, Whitefish Lake and Lakeshore Protection Committee Chair presented the two letters that are included in the packet. Mayor Muhlfeld stated Council would discuss this item at the end of the meeting.

7) CONSENT AGENDA (The consent agenda is a means of expediting routine matters that require the Council's action. Debate does not typically occur on consent agenda items. Any member of the Council may remove any item for debate. Such items will typically be debated and acted upon prior to proceeding to the rest of the agenda.)

- a) **Minutes** from November 1, 2025, Retreat Meeting (p.64)
b) **Minutes** from November 17, 2025, Special Session (p.66)
c) **Minutes** from November 17, 2025, Regular Meeting (p.67)
d) **Consideration** of request from Karrow Whitefish Investment, LLC to extend the Subdivision Improvement Agreement for Whitefish Yards to December 31, 2027(p.74)

([YouTube Video 44:21](#))

Councilor Sweeney made a motion, seconded by Councilor Qunell to approve the Consent Agenda as presented. The motion carried.

8) PUBLIC HEARINGS (Items will be considered for action after public hearings) (Resolution No. 07-33 establishes a 30-minute time limit for applicant's land use presentations.)

None

9) COMMUNICATIONS FROM CITY MANAGER ([YouTube Video 44:45](#))

- a) **Written report** enclosed with the packet. Questions from Mayor and Council? (p.104)

None

b) Other items arising between November 26th through December 1st

Manager Smith mentioned she will be out of the office from December 3 through December 9th for her wedding.

10) COMMUNICATIONS FROM MAYOR AND CITY COUNCILORS

a) Letter from Lucas Foust regarding Glacier Twins Lease (p.106)

([YouTube Video 45:31](#))

Councilor Sweeney stated that the letter is inconsistent with the facts known to the Council. He noted that he and Councilor Feury met with Glacier Twins representatives and staff a few weeks ago.

Mayor Muhlfeld read the 2026 Arbor Day Proclamation. ([YouTube Video 46:42](#))

Council Comments ([YouTube Video 47:18](#))

Councilor Caltabiano congratulated Habitat for Humanity for their hard work. Councilor Qunell thanked Habitat and expressed hope for future collaboration and also thanked Jamie Goguen for highlighting winter activities beyond skiing. Councilor Davis thanked Habitat for their presentation and commented on the letters to the County Commissioners regarding Lakeshore violations, stating the form and content seemed reasonable and he had no issues with them. Mayor Muhlfeld agreed but suggested combining the letters and noted he would follow up with planning staff and the city manager on how best to submit them. Councilor Feury recommended the letters come jointly from both the Council and the Lakeshore Protection Committee. He also raised concerns about light pollution from large homes, citing the Cantera project, and Director Taylor noted the ordinance would need to be amended to address this. Mayor Muhlfeld reminded the public of the City's partnership with the North Valley Food Bank, with donations accepted at City Hall and the Food Bank, and monetary contributions available through the Food Bank website.

11) ADJOURNMENT (Resolution 08-10 establishes 11:00 p.m. as end of meeting unless extended to 11:30 by majority)

Mayor Muhlfeld adjourned the meeting at 8:05 p.m.

Mayor Muhlfeld

Attest:

Michelle Howke, Whitefish City Clerk

WHITEFISH CITY COUNCIL
December 15, 2025
SPECIAL SESSION AT 5:00 PM

1) Call to Order

Deputy Mayor Sweeney called the meeting to order. Councilors present were Feury, Davis, Norton and Mayor Muhlfeld via phone. Councilors Qunell and Caltabiano were absent. Staff present were City Manager Meeker, City Clerk Howke, City Attorney Jacobs, Planner Macdonald, Community Resiliency Long-Range Planner II Zamoyski.

2) Interviews

- a) 5:10 pm – Roger Rowles – WLLP – Incumbent
- b) 5:20 pm – Mike Hein – Impact Fee - Incumbent
- c) 5:30 pm – Brandon Theis – Impact Fee – Incumbent
- d) 5:40 pm – Amelia Apgar – Climate Action Plan
- e) 5:50 pm – Eric Boxer - Climate Action Plan
- f) 6:00 pm – Zach Enloe - Climate Action Plan

3) Public Comment

None

4) Appointment

- a) [Sustainable Tourism Management Plan](#) – 3 openings - 2-year term — Mayoral appointment (Molly Burns, Heather Hilton, Marci Suazo, Heather Cauffman (Incumbent), Scott Steinmann (Incumbent))

Deputy Mayor Sweeney appointed with confirmation from Council, Heather and Scott, Molly Burns.

- b) Climate Action Plan – 4 openings – (3) 2-year term – (1) complete term ending 12/31/2026 – Mayoral appointment (One applicant remaining to be interviewed at a later date)

Mayor Muhlfeld appointed with confirmation from Council, Amelia Apgar and Eric Boxer. Readvertise for 3rd position.

- c) Impact Fee Advisory Committee – 2 openings – 2-year term - Mayoral appointment

Mayor Muhlfeld re appointed with confirmation from Council, Mike Hein and Brandon Theis to the Impact Fee Advisory.

- d) Lake and Lakeshore Protection Committee – 2-year term – 3 openings – (2) incumbents – Council appointment

- i) Toby Scott – current term ends 12/31/2025 as representative of the Planning Commission.

Deputy Mayor Sweeney, seconded by Councilor Norton to re-appoint Roger Rowles, and Toby

**Scott as member-at-large for a 2-year term on the Lake and Lakeshore Protection Committee.
The motion carried.**

Mayor Muhlfeld adjourned the Special Session at 6:35pm and opened the Closed Executive Session.

5) Adjournment

Deputy Mayor adjourned the Special Session and opened the Executive Session at 6:20pm.

Deputy Mayor Sweeney

Attest:

Michelle Howke, Whitefish City Clerk

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418 East 2nd Street · PO Box 158 · Whitefish, MT 59937
(406) 863-2410 · Fax : (406) 863-2409
www.cityofwhitefish.gov



December 30, 2025

Mayor and City Council
City of Whitefish
PO Box 158
Whitefish MT 59937

RE: Whitefish School District; Whitefish High School Expansion at 1143 E 4th Street
(WCUP 25-13)

Honorable Mayor and Council:

Summary of Requested Action: This is a request for a Conditional Use Permit (CUP) by Shane Jacobs, representing the Whitefish School District, proposing academic expansions and athletic facility improvements at 1143 E 4th Street. The properties are currently developed with an athletic field, associated storage facilities, and a school structure. They are zoned WR-1 (One-Family Residential District), and the Whitefish Growth Policy designates them as 'Public/Semi-Public'.

Planning & Building Department Recommendation: Staff recommended approval of the Conditional Use Permit application subject to eleven (11) conditions set forth in the attached staff report.

Public Hearing: Shane Jacobs and Brandon Theis, the project's designer and engineer, were present and made themselves available for inquiries from the commission. One member of the public spoke at the December 18, 2025 public hearing, inquiring about a range of topics including parking, lighting, and traffic flow – all of which Shane and Brandon addressed. The draft minutes for this item are attached as part of this packet.

Planning Commission Action: The Whitefish Planning Commission met on December 18, 2025, and considered the request. Following the hearing, the Planning Commission unanimously voted to approve the request. In making their decision, the Planning Commission adopted staff report WCUP 25-13 with Findings of Fact and recommended conditions of approval.

Proposed Motion:

- I move to approve WCUP 25-13, the Findings of Fact in the staff report and recommended conditions of approval, as recommended by the Whitefish Planning Commission on December 18, 2025.

This item has been placed on the agenda for your regularly scheduled meeting on January 5, 2026. Should Council have questions or need further information on this matter, please contact the Planning Commission or the Planning & Building Department.

Respectfully,

/s/ Lauren Macdonal

Lauren Macdonald
Planner I

Att: Exhibit A: Planning Commission Recommended Conditions of Approval, December 18, 2025
Draft Minutes, Planning Commission, December 18, 2025

Exhibits from December 18, 2025, CDB Packet

1. Staff Report – WCUP 25-13, 12-18-25
2. Adjacent Landowner Notice, 11-20-25
3. Flathead County GIS Noticing Map, 11-20-25
4. Advisory Agency Notice, 11-26-25

The following were submitted by the applicant:

1. Application for Conditional Use Permit, 11-03-25

c: w/att Michelle Howke, City Clerk

Exhibit A
Whitefish School District
WCUP 25-13
Whitefish Planning Commission
Recommended Conditions of Approval
December 18, 2025

1. The project must be in compliance with the plans submitted on November 3, 2025, except as amended by these conditions. Minor deviations from the plans require review pursuant to §11-7-8E(8), WCC, and major deviations from the plans require review pursuant to §11-7-8, WCC. The applicant must maintain and demonstrate continued compliance with all adopted City Codes and Ordinances.
2. The Whitefish Fire Department requires the applicant to comply with all fire codes for this classification of occupancy. Emergency vehicle access, hydrants, and any extended fire suppression system will be reviewed by the Fire Department as part of the building permit. (IFC)
3. An engineered stormwater plan must be submitted for review and approval to the Public Works Department at the time of a building permit application if the cumulative amount of impervious surface is greater than 10,000 square feet. (City Engineering Standards, 2019)
4. Sidewalk and boulevard must be extended on the south side of E. 4th Street from Fir Avenue to Willow Brook Close.
5. Prior to any pre-construction meeting, construction, excavation, grading or other terrain disturbance, plans for all on and off site infrastructure shall be submitted to and approved by the Whitefish Public Works Department. The improvements (water, sewer, roads, street lights, trails, sidewalks, driveways, etc.) within the development shall be designed and constructed by a licensed engineer and in accordance with the City of Whitefish's design and construction standards. The Public Works Director shall approve the design prior to construction. Plans for grading, drainage, utilities, streets, sidewalks and other improvements shall be submitted as a package and reviewed concurrently. No individual improvement designs shall be accepted by Public Works. (City Engineering Standards, 2009)
6. The applicant must provide a minimum of two locking bicycle racks as close to the existing building as possible or 10% of the number of required vehicle spaces. (§11-3-43E, WCC)
7. Compliance with the Landscaping Chapter will be confirmed at the time of building permit. (Chapter 4, WCC)

8. Architectural Review approval must be obtained prior to submitting an application for a building permit. (§11-3-3B, WCC)
9. All on-site lighting must be dark sky compliant. (§11-3-25, WCC)
10. A sign permit must be obtained prior to installation of any signs. (§11-5, WCC)
11. The conditional use permit is valid for 18 months and will terminate unless commencement of the authorized activity has begun. (§11-7-8, WCC)

received, two supporting the CUP and one with concerns about outdoor noise at night and proximity to the bike path.

Staff recommended adoption of the findings of facts within staff report WCUP 25-12 for **approval** of a CUP to add a beer and wine license to the existing brewery.

COMMUNICATIONS FROM THE BOARD

Norton is concerned about the noise and asked if they could restrict hours to 8:00 pm instead of 10pm.

Boland reminded the board about the 10pm noise ordinance.

Director Taylor noted that no other similar business has such restrictions and similar facilities with outside music options must cease by 10 pm.

COMMUNICATIONS FROM APPLICANT/AGENCIES

David Wright, 28 Fairview Drive, told the board they will only be open until 10:00 pm during the summer, and they stopped the music at 8pm last October. Their long-term goal is to build an indoor kitchen at this location and may move the manufacturing to a larger area in Whitefish.

Norton asked they keep the noise in mind.

MOTION AND VOTE (WCUP 25-12)

Norton made a motion, seconded by Wurster to approve the WCUP (25-12). The motion passed unanimously.

2. WCUP 25-13 A request by Shane Jacobs, representing the Whitefish School District for a Conditional Use Permit for Whitefish High School. The permit pertains to proposed academic expansions and athletic facility improvements. The properties are currently developed as an athletic fields and associated storage facilities as well as a school structure and is zoned WR-1 (One-Family Residential District). The property is located at 1143 4th Street and can be legally described as Tract 5 and 5E, in the SW ¼ and NW ¼ in S32 T31N R21W, P.M.M., Flathead County.

Planner I Lauren Macdonald reviewed the staff report, findings and conditions of this request. As of the writing of WCUP 25-13 one comment has been received with concerns about traffic flow through the existing alley connecting 2nd Street and 4th Street and ending at the entrance of Willow Brook Close.

Staff recommended adoption of the findings of fact within staff report WCUP 25-13 for **approval** of the academic expansions and athletic facility improvements for the Whitefish High School.

COMMUNICATIONS FROM THE BOARD

Boland had questions about the bike racks and if the additional fertilizer would drain into Cow Creek.

Macdonald said a portion of the drainage will go through 4th and Pine. The project representatives can address the question of drainage question in more detail.

Wurster asked about page 3 paragraph F and why an adopted zone district has not yet been created for Public/Semi Public designations.

Taylor explained that creating a zoning district that fits all Public/Semi Public uses is difficult given the range of uses from parks to water treatment facilities, and schools. Setbacks, lot coverage, and lot minimums vary greatly from use to use. Each and every zone change for a public facility requires a separate metes and bounds description as well. They plan on doing this in the future but since it's a zone change, its not part of the growth policy but could be an objective.

COMMUNICATIONS FROM THE APPLICANT/AGENCIES

Shane Jacobsen, 503 Tumbleweed, discussed the different bonds over the few years. They have met with staff and are trying to promote walking to school.

Brandon Theiss went over the treatment of the storm water into the pond and fertilizer concerns. He also explained how they would add additional parking, make the sidewalks wider and where the bus parking would be.

Norton is concerned about the sludge in the pond.

Theiss told her they will do bi-annual inspections and can scoop out sediment if needed.

Boland asked if they would do regular testing in the ponds, and Theiss said no.

Scott is curious if they could move the scoreboard to the Northeast side so people in the parking lot could view it.

Craig Workman agrees with the placement of the scoreboard and will work with the school to make sure they don't over fertilize the land. He said the track fertilizer already drains into cow creek and there haven't been any problems.

PUBLIC COMMENT

Alex Maetzold, 1338 East 4th Street, lives where they want to move the scoreboard. He questioned the new lighting for the field.

Jacobsen went over the new lighting system and how it will stop at the property lines.

Maetzold confirmed the track will still be open to the public.

G) GOOD AND WELFARE

- **Matters from the Board**

Norton thanked everyone for their hard work over the past 2 years.

- **Matter from the Staff**

Staff wished everyone happy holidays.

- **Poll of Commission members available for next meeting, January 15, 2026**

All board members present except Toby Scott indicated they would be at the January 15, 2026, meeting.

Scott Wurster asked to be nominated for the Vice Chair position after Toby Scott leaves.

- **Reminder: next Vision Whitefish 2045 Meeting 6PM on January 7th; Vision Whitefish 2045 Land Use Open House at 5:30 PM on January 14th**

H) ADJOURNMENT

Boland made a motion, seconded by Wurster to adjourn the meeting at 7:01 pm.

**WHITEFISH SCHOOL DISTRICT
CONDITIONAL USE PERMIT
STAFF REPORT WCUP 25-13
DECEMBER 18, 2025**



This is a report to the Whitefish Planning Commission and the Whitefish City Council regarding a request for a Conditional Use Permit (CUP) by Shane Jacobs, representing the Whitefish School District, to develop an expansion of academic and athletic facilities at Whitefish High School. The property is currently developed as a school facility and associated athletic fields and other accessory storage facilities and are zoned WR-1 (One-Family Residential District). The property is located at 1143 E 4th Street and can be legally described as Tracts 5 and 5E, in the SW $\frac{1}{4}$ and NW $\frac{1}{4}$ in S32 T31N R21W, P.M.M., Flathead County. This application has been scheduled before the Whitefish Planning Commission for a public hearing on Thursday, December 18, 2025. A recommendation will be forwarded to the City Council for a subsequent public hearing and final action on Monday, January 5, 2026.

PROJECT SCOPE

The applicant is requesting a conditional use permit (CUP) to construct a two-story academic expansion to the existing Whitefish High School and to redevelop the associated athletic facilities. The proposed academic expansion includes an addition to the west elevation of the existing gymnasium to provide additional classroom space, replacing a portion of the building that will be removed, as well as an addition to the southeast corner to create a new Career and Technical Education (CTE) classroom space. The project also includes upgrades to the athletic fields east of the school, with improvements such as a new track surface, a bleacher structure with press box, and a ticketing/concession/storage/restroom facility that will be accessory to the high school.

A Conditional Use Permit is required for this project because a school (K-12) is a Conditional Use in the WR-1 zoning district (§11-2F-3).

Figure 1 – Artist rendering of F-Wing Addition



A. APPLICANT:
 Shane Jacobs, A&E Design
 40 2nd St. E, Ste. 215
 Kalispell, MT 59901

OWNER:
 Whitefish School District
 600 E 2nd Street
 Whitefish, MT 59937

B. SIZE AND LOCATION OF PROPERTY:

The properties combine are 20.75 acres and is located at 1143 E 4th Street. It can be legally described as Tracts 5 and 5E, in the SW ¼ and NW ¼ in S32 T31N R21W, P.M.M., Flathead County.

Figure 2 – Ariel View of Subject Property



C. EXISTING LAND USE:

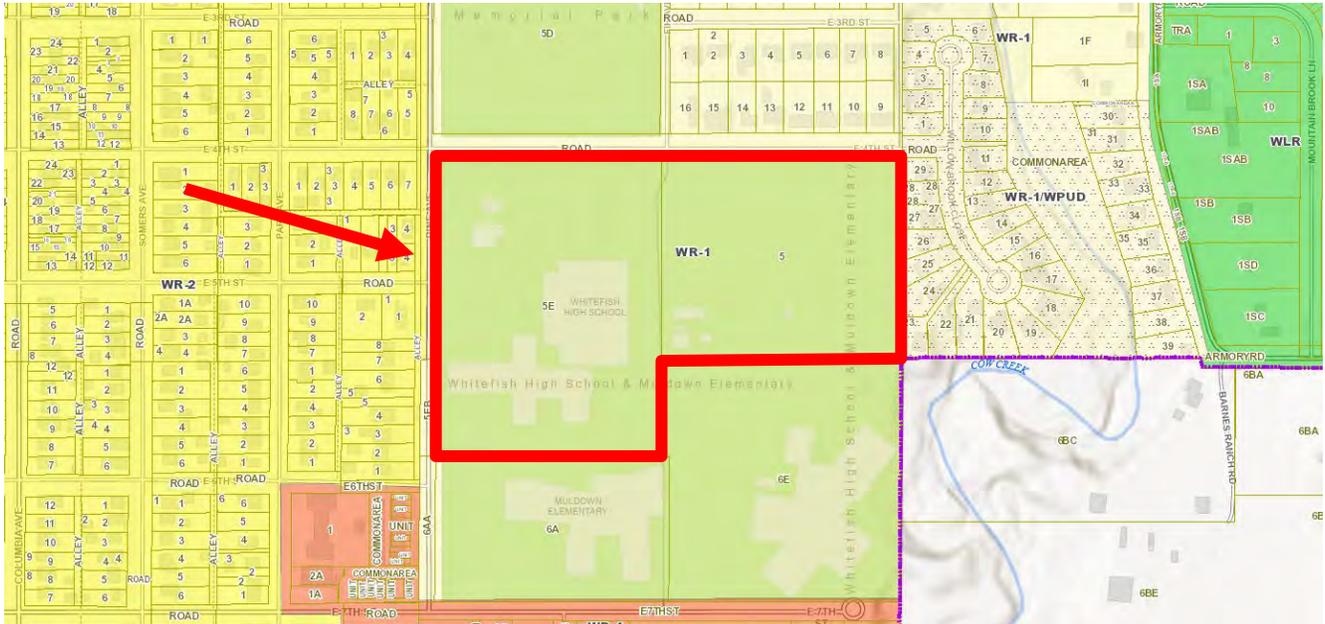
The subject property is currently developed as a high school, with associated parking, athletic track and field, and accessory storage sheds.

D. ADJACENT LAND USES AND ZONING:

North:	Memorial Park & Residential	WR-1
West:	Residential	WR-2
South:	Muldown Elementary School	WR-1
East:	Residential	WR-1/PUD

E. ZONING DISTRICT:

The property is zoned WR-1 (One-Family Residential District). The purpose of the WR-1 District is 'intended for residential purposes to provide for single-family and duplex dwellings in an urban setting connected to all Municipal utilities and services.'



F. WHITEFISH CITY-COUNTY GROWTH POLICY DESIGNATION:

The Growth Policy designation is Public/Semi-Public. The City has not developed a zoning district to comply with this land use designation.

Schools and municipal government services fall under this designation. Underlying zoning varies by neighborhood, and a separate P/SP should be considered when the zoning code is revised following adoption of this Growth Policy.



G. UTILITIES:

Sewer: City of Whitefish
Water: City of Whitefish
Solid Waste: Republic Services
Electric: Flathead Electric Co-op
Natural Gas: Northwestern Energy
Phone: CenturyLink
Police: City of Whitefish
Fire: City of Whitefish

G. PUBLIC COMMENTS:

A notice was mailed to adjacent landowners within 300-feet of the subject parcel on November 26, 2025 and a sign was posted on the property on December 1, 2025. On November 26, 2025, a notice was emailed to advisory agencies, and the entire application was posted to the city webpage. A notice of the public hearing was published in the *Whitefish Pilot* on December 3, 2025. As of the writing of this report, no public comment has been received.

REVIEW AND FINDINGS OF FACT

This application is evaluated based on the "criteria required for consideration of a Conditional Use Permit," per Section 11-7-8(J) of the Whitefish Zoning Regulations.

- 1. Growth Policy Compliance:** As described above, the school is located within Public/Semi-Public land use designation. This designation recommends developing a Public/Semi-Public zoning designation. This zoning district is yet to be developed. This designation is intended for schools and municipal government services.

Finding 1: The proposed use complies with the Growth Policy because it is a public school.

- 2. Compliance with regulations. The proposal is consistent with the purpose, intent, and applicable provisions of these regulations.**

The property is zoned WR-1, One-Family Residential District. The development proposal is consistent with the purpose and intent of the applicable regulations.

Setbacks:

The setbacks in the WR-1 are: 25-feet in the front, 10-feet in the side yard, and 20-feet in the rear yard. The proposed project design complies with setback requirements.

Height:

The maximum height allowed in the WR-1 zoning is 35-feet. In 2012 the Board of Adjustments approved a variance to the zoning height limit from 35-feet to 41-feet. The project design will not exceed the existing building height and will comply with the height requirement.

Lot Coverage:

The maximum lot coverage allowed in the WR-1 zoning is 35%. The proposed project design complies with the lot coverage requirement.

Off-street Parking:

The existing on-site parking is non-conforming, as it does not meet the zoning standards. There currently are 368 parking spaces where the zoning would require 600 spaces; the zoning standards for a high school require 1 space per 25 students; plus 1 space for each employee and faculty member, but not less than the assembly facility area requirement of 1 space per 4 seats. The proposed construction will not affect the gymnasium/assembly space, so that portion of the calculation remains unchanged.

In the 2012 CUP, staff determined that the zoning requirement of 575 spaces for the gym was excessive and impractical and instead supported continuation of the 383 spaces that had historically served the school adequately. Although the school later restriped the student lot from parallel to perpendicular stalls, reducing the total number of spaces, to the existing 368 spaces. The proposed project will redraw the affected lot and incorporate 9 new spaces, bringing the total parking spaces to 392. Since the remodel maintains the assembly space and improves the parking condition, staff supports retaining the existing supply with the planned adjustments

Non-Residential Development Standards:

Building Orientation:

The existing high school is oriented toward Pine Avenue and the adjacent public paths and sidewalks with auto access. The proposed additions will remain oriented towards Pine Avenue as well as Fir Avenue that separates the academic building from the athletic fields.

Pedestrian and Bicycle Accommodation:

Bike and pedestrian paths exist on all sides of the site. An improved path will be incorporated on the west side of the track and field to enhance the existing connection between East 4th Street and Muldown Elementary. The school provides short-term bicycle parking at multiple locations on campus. Zoning requires bicycle parking equal to 10% of the number of required vehicle spaces. Compliance with this standard will be a condition of approval and will be verified at the time of building permit submittal.

Support Elements:

Refuse and storage are located at the rear of the property away from adjacent streets.

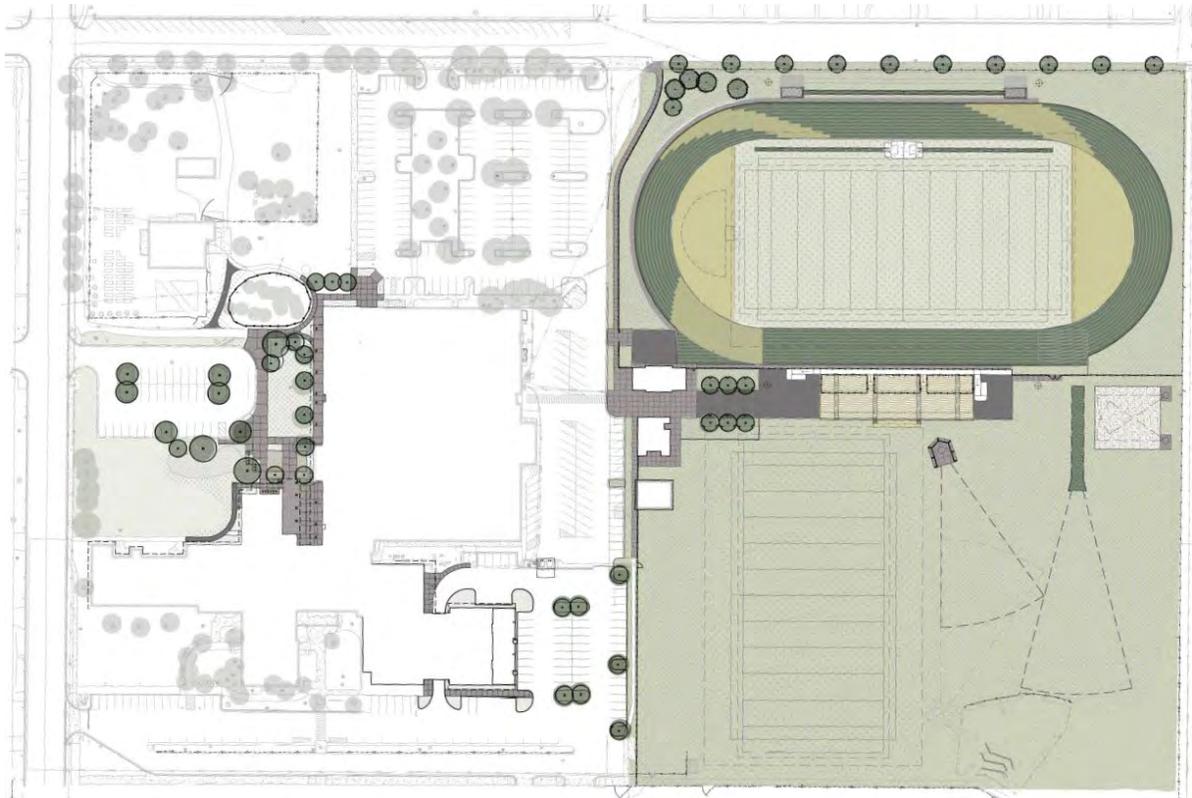
Finding 2: The project complies with the zoning regulations because all the zoning standards including non-residential building standards are being met or will be met with conditions of approval, and will be further reviewed at the time of building permit.

3. Site Suitability. The site must be suitable for the proposed use or development, including:

Adequate usable land area: The subject parcel is adequate to serve the proposed use.

Access that meets the standards set forth in these regulations, including emergency access: Access to the public streets meets the zoning requirements. The applicant has met with the fire department where they discussed fire department issues, including emergency access. Final review of fire department requirements will occur at the time of building permit review.

Figure 3: Proposed Site Plan



Absence of environmental constraints that would render the site inappropriate for the proposed use or development, including, but not necessarily limited to floodplains, slope, wetlands, riparian buffers/setbacks, or geological hazards: The proposed development is not located within the 100-year floodplain and there are no other environmental constraints on-site.

Finding 3: Project is suitable for the site because there is adequate usable land area, the proposed access will meet emergency standards and there are no environmental constraints.

4. Quality and Functionality. The site plan for the proposed use or development has effectively dealt with the following design issues as applicable.

Parking locations and layout: For the academic school day or during athletic events, students and visitors will use all parking on the site. The main student parking lot, bus

drop-off, and staff parking will remain as currently located. The reconfigured parking lot on the west offsets any parking lost through the building additions.

Traffic Circulation: Pine Avenue and E 4th Street should see no impact on traffic circulation from what currently exists.

Open space: The additions have been designed to be as tight to the existing building as possible continuing with the two-story footprint to maximize open space. The size of the athletic buildings has additionally been minimized to encourage as much open space as possible to remain designated at the school. No open space dedication is required with the conditional use permit.

Fencing/Screening: New fencing is proposed around the track field to help minimize unauthorized access to the new facility while still allowing community access to the track when not being used by students.

Figure 4: Existing Athletic Field and Fencing



Landscaping: Existing landscaping along the edges of the site will be maintained as much as possible. Some new landscaping will be added in some corners of the track and field sites, as well as near the new additions to the building and at improved parking locations. A detailed landscaping plan will be reviewed at the time of building permit.

Signage: No signage plan was proposed; there are sign standards for schools. All signage shall comply with the city's sign regulations and obtain a sign permit prior to installation.

Undergrounding of new and existing utilities: New and existing utilities will be placed or remain underground in accordance with all city regulations and the approved plan set.

Finding 4: The quality and functionality of the proposed development has effectively dealt with the site design issues because the applicant is providing the required number of spaces, traffic circulation will not be impacted, the property must comply with current landscaping requirements, and proposed screening will comply with city standards.

5. Availability and Adequacy of Public Services and Facilities.

Sewer and Water: The property is served by both municipal water and sewer. It is adequate to serve the project.

Storm Water Drainage: Storm water public services are available, but upgrades to certain portions of the existing systems will be necessary. The existing stormwater infrastructure drains to two separate locations. Much of the academic portion of the project currently drains to the Pine Avenue stormwater system, while majority of the athletics portion drains straight to Cow Creek. The proposed stormwater design separates the athletic and academic stormwater basins to route the run-off (to the Pine Avenue System where it will be treated by a water quality device prior to its discharge. The drainage basin for the athletics portion of the project collects stormwater from non-polluted surfaces (i.e., the football field, practice areas, non-driving surfaces) where it will be routed to Cow Creek. Both stormwater systems will utilize proposed and existing stormwater conveyance infrastructure. As is required by the Engineering Standards, neither stormwater system will allow stormwater to leave the site at a rate greater than it has historically. The city will review and approve the stormwater infrastructure plan prior to installation.

Fire Protection: The Whitefish Fire Department serves the site and response times and access are good. The proposed use is not expected to have significant impacts upon fire services.

Police: The City of Whitefish serves the site; response times and access are adequate. The proposed use is not expected to have significant impacts upon police services.

Streets: This site is served by E 4th Street and Pine Avenue. Fir Street is at the northeast intersection of the project and enters the parking lot.

Finding 5: Public services and facilities are adequate and available because municipal water and sewer serve the project, response times for police and fire are not anticipated to be affected due to the proposed development and the property will have adequate access off public roads.

6. Neighborhood/Community Impact:

Traffic Generation: The traffic generation for this site will be the same as the current school. During construction, there will be increased traffic due to the vehicles associated with constructing the buildings.

Noise or Vibration: No additional noise or vibration is anticipated to be generated from the proposed use. Any additional noises or vibrations associated with construction are not anticipated to be permanent impacts.

Dust, Smoke, Glare, or Heat: No impact from dust, smoke, glare, or heat is anticipated beyond what might be generated during construction. Any outdoor lighting is required to be dark sky compliant.

Smoke, Fumes, Gas, and Odor: No impact is anticipated with regards to smoke, fumes or gas.

Hours of Operation: The high school hours will remain the same as the current operational hours. The current athletics schedule will also remain the same with playoff games being subject to other scheduling.

Finding 6: The proposed development is not anticipated to have a negative impact on neighborhoods. Negative impacts of noise, dust, smoke, odor or other environmental nuisances are not expected to be beyond current impacts.

7. Neighborhood/Community Compatibility:

Structural Bulk, Massing, and Scale: *Mass* is defined as a building's bulk, size and magnitude – the overall volume. *Scale* correlates to the spatial relationship with neighboring buildings. The proposed additions to the high school will be the same height or less as the existing school. The buildings will not impede the existing relationships to neighboring buildings any more than the current use.

Context of Existing Neighborhood: The existing neighborhood is predominantly residential along with the schools and public parks.

Density: This project will not change the density of the neighborhood.

Community Character: The high school has been in this particular location for nearly 70-years. The community character will not change with minor additions to the existing school and connected facilities. The design of the additions has been carefully thought through to fit in and work well with the existing building. The final new construction design will be required to obtain Architectural Review prior to submitting an application to the Building Department.

Finding 7: The overall mass, bulk, and scale will not change from existing structures. The proposed addition is in keeping with the existing neighborhood. The project will obtain Architectural Review.

RECOMMENDATION

The findings as drafted support approval of the project. It is recommended that the Whitefish Planning Commission adopt the findings of fact within staff report WCUP 25-13 and this conditional use permit be recommended for **approval** to the Whitefish City Council subject to the following conditions:

1. The project must be in compliance with the site plan submitted on November 3, 2025, except as amended by these conditions. Minor deviations from the plans require review pursuant to §11-7-8M, WCC, and major deviations from the

plans require review pursuant to §11-7-8, WCC. The applicant must maintain and demonstrate continued compliance with all adopted City Codes and Ordinances.

2. The Whitefish Fire Department requires the applicant to comply with all fire codes for this classification of occupancy. Emergency vehicle access, hydrants, and any extended fire suppression system will be reviewed by the Fire Department as part of the building permit. (IFC)
3. An engineered stormwater plan must be submitted for review and approval to the Public Works Department at the time of a building permit application if the cumulative amount of impervious surface is greater than 10,000 square feet. (City Engineering Standards, 2019)
4. Sidewalk and boulevard must be extended on the south side of E. 4th Street from Fir Avenue to Willowbrook Close.
5. Prior to any pre-construction meeting, construction, excavation, grading or other terrain disturbance, plans for all on and off site infrastructure shall be submitted to and approved by the Whitefish Public Works Department. The improvements (water, sewer, roads, street lights, trails, sidewalks, driveways, etc.) within the development shall be designed and constructed by a licensed engineer and in accordance with the City of Whitefish's design and construction standards. The Public Works Director shall approve the design prior to construction. Plans for grading, drainage, utilities, streets, sidewalks and other improvements shall be submitted as a package and reviewed concurrently. No individual improvement designs shall be accepted by Public Works. (City Engineering Standards, 2009)
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7. Compliance with the Landscaping Chapter will be confirmed at the time of building permit. (Chapter 4, WCC)
8. Architectural Review approval must be obtained prior to submitting an application for a building permit. (§11-3-3B, WCC)
9. All on-site lighting must be dark sky compliant. (§11-3-25, WCC)
10. A sign permit must be obtained prior to installation of any signs. (§11-5, WCC)
11. The conditional use permit is valid for 18 months and will terminate unless commencement of the authorized activity has begun. (§11-7-8, WCC)

Public Notice of Proposed Land Use Action



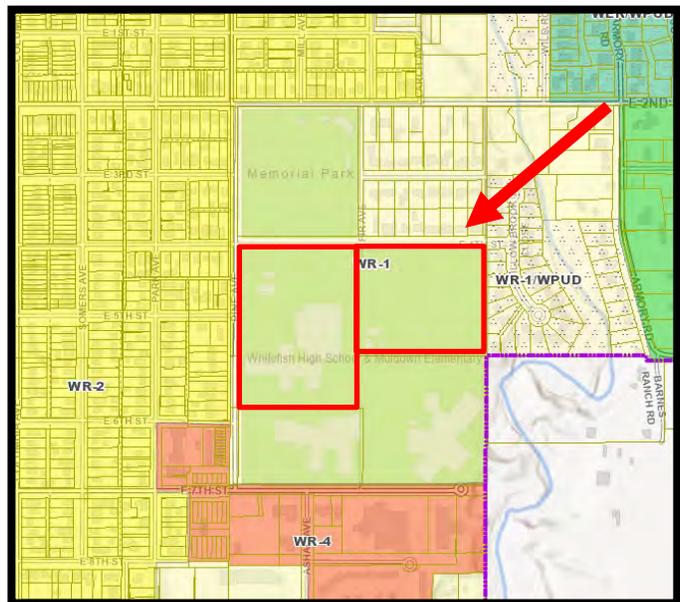
Shane Jacobs, representing the Whitefish School District, has submitted a request for a Conditional Use Permit for Whitefish High School. The permit pertains to proposed academic expansions and athletic facility improvements. The properties are currently developed as an athletic fields and associated storage facilities as well as a school structure and is zoned WR-1 (One-Family Residential District). The property is located at 1143 4th Street and can be legally described as Tract 5 and 5E, in the SW $\frac{1}{4}$ and NW $\frac{1}{4}$ in S32 T31N R21W, P.M.M., Flathead County.

You are welcome to provide comments on the project. Comments can be in written or email format. The Whitefish Planning Commission will hold a public hearing for the proposed project request on:

Thursday, December 18, 2025
6:00 p.m.
Whitefish City Council Chambers, City Hall
418 E 2nd Street, Whitefish MT 59937

The Whitefish Planning Commission will make a recommendation to the City Council, who will then hold a public hearing and take final action on **Monday, January 5, 2025** at 7:10 p.m., also in the Whitefish City Council Chambers.

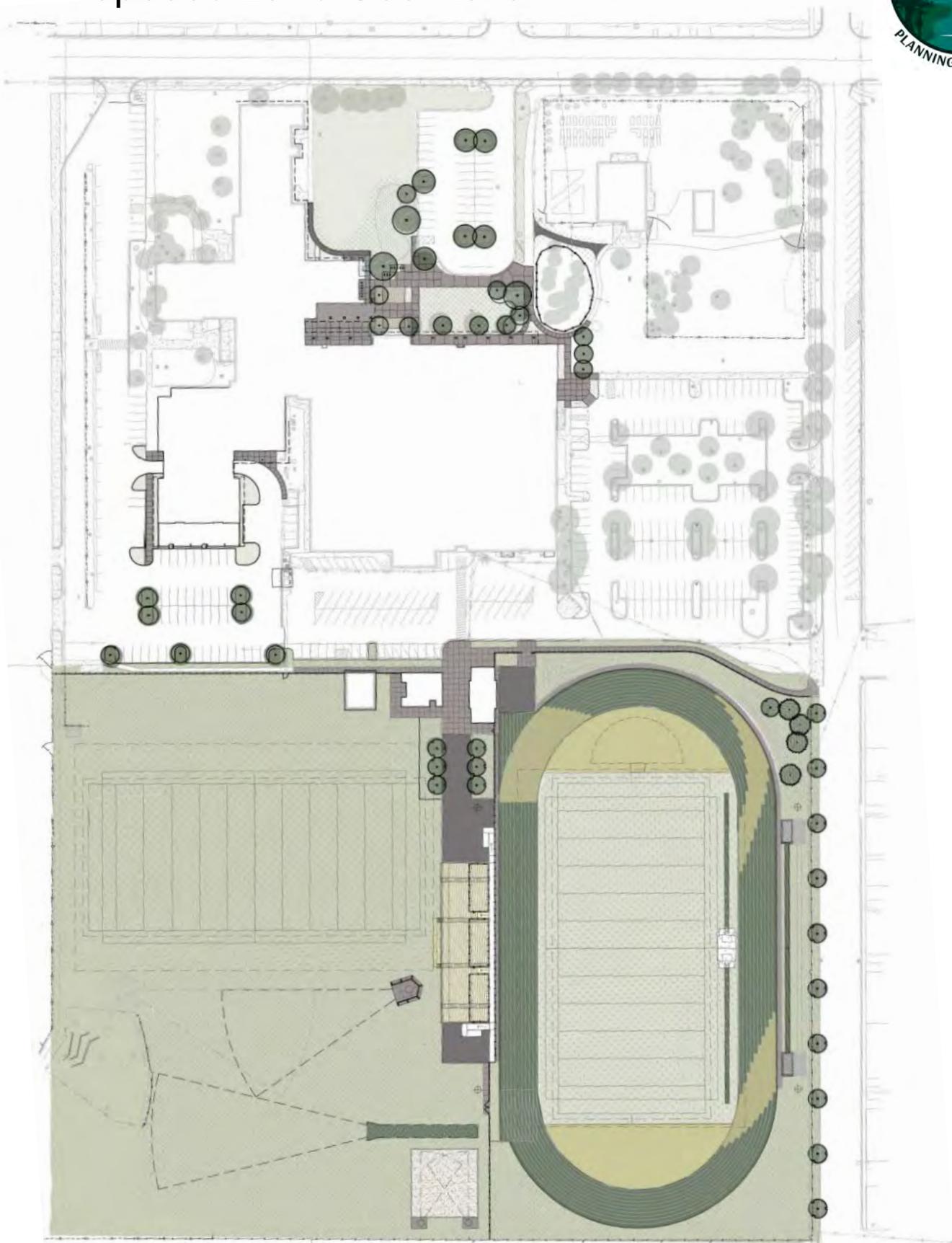
Additional information on this proposal can be obtained at the Whitefish Planning Department and on the Planning Department webpage – Current Land Use Actions: www.cityofwhitefish.gov. The public is encouraged to comment on the above proposal and attend the hearing. Please send comments to the Whitefish Planning Department (address below) or email at Imacdonald@cityofwhitefish.gov. Comments received by the close of business on Wednesday, December 10, 2025, will be included in the packets to Board members. Comments received after the deadline will be summarized to Board members at the public hearing.



VICINITY MAP

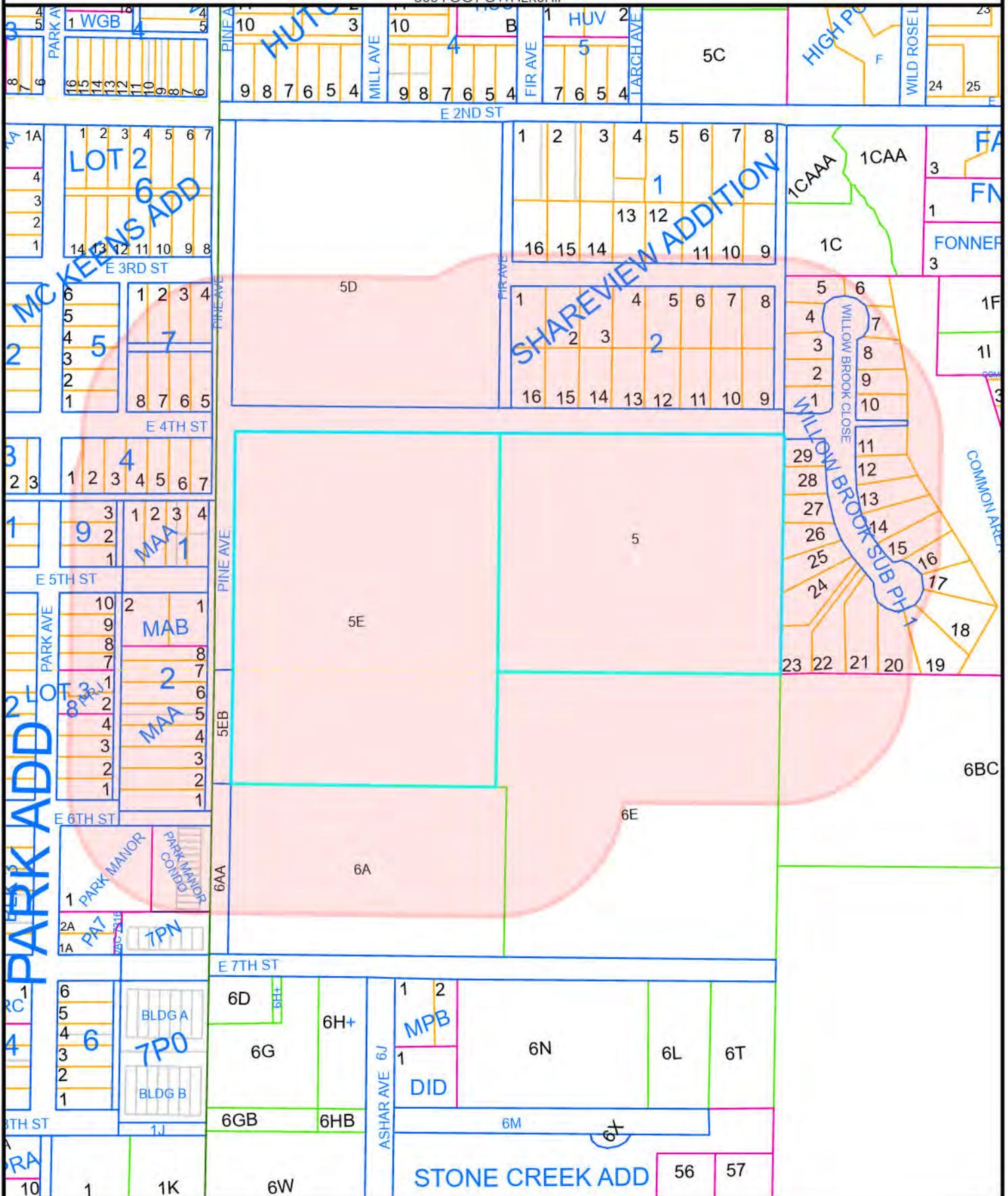
Please share this notice with your neighbors

Public Notice of Proposed Land Use Action

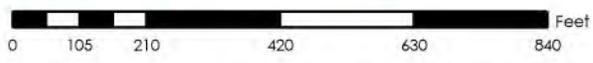


TRACT 5, 5E IN S32 T30N R20W PMM

300 FOOT OWNERSHIP



Flathead County GIS Department



Date: 11/18/2025

City Council Packet, January 5, 2026 Page 138 of 287

This map is for illustrative purposes only and does not necessarily meet mapping, surveying, or engineering standards. Deriving conclusions from this map is done at the user's risk.

PLANNING & BUILDING DEPARTMENT

418 E Second Street/PO Box 158

Whitefish, MT 59937

Phone (406) 863-2410 Fax (406) 863-2409



Date: November 26, 2025

To: Advisory Agencies & Interested Parties

From: Whitefish Planning & Building Department

At the regular meeting of the Planning Commission on Thursday, December 18, 2025, at 6:00 PM, the Commission will hold a public hearing on the items listed below. The Commission meets in the Whitefish Council Chambers at City Hall, at **418 E. 2nd Street** Whitefish, Montana. The Commission recommendation for the following items will be forwarded onto the Whitefish City Council for subsequent public hearing on January 5, 2026. City Council meetings start at 7:10 PM and will also be held at City Hall.

1. A request by Little Bear Developments No4 LLC for a Conditional Use Permit to add and beer and wine license to an existing brewery. The property is currently developed as a commercial brewery and restaurant and is zoned WB-1 (Limited Business District). The property is located at 549 Wisconsin Avenue and can be legally described as Lot 1, Densin & Lot 2, Half Full in S25, T31N, R22W, P.M.,M. Flathead County, Montana. (WCUP 25-12) Taylor
2. A request by Shane Jacobs, representing the Whitefish School District for a Conditional Use Permit for Whitefish High School. The permit pertains to proposed academic expansions and athletic facility improvements. The properties are currently developed as an athletic fields and associated storage facilities as well as a school structure and is zoned WR-1 (One-Family Residential District). The property is located at 1143 4th Street and can be legally described as Tract 5 and 5E, in the SW ¼ and NW ¼ in S32 T31N R21W, P.M.M., Flathead County. (WCUP 25-13) Macdonald

The Commission will also be holding two *Vision Whitefish 2045* meetings in December:

- Wednesday, 3rd at 6 PM on the Transportation Element
- Wednesday, 17th at 6 PM on the Housing Element

Documents pertaining to these agenda items are available for review at the Whitefish Planning & Building Department, 418 E Second Street, during regular business hours and the applications are available [HERE](#). The full application packet along with public comments and staff report will be available on the City's webpage: www.cityofwhitefish.gov under Planning Commission one week prior to the public hearing date noted above. Inquiries are welcome. Interested parties are invited to attend the meeting and make known their views and concerns. Comments in writing may be forwarded to the Whitefish Planning & Building Department at the above address prior to the hearing or via email: dtaylor@cityofwhitefish.gov. For questions or further information regarding these proposals, call 406-863-2410.



City of Whitefish
 Planning & Building Dept
 418 E 2nd St | PO Box 158
 Whitefish, MT 59937
 Phone: 406-863-2410

File #: _____
 Date: _____
 Intake Staff: _____
 Check #: _____
 Amount: _____
 Acct #: 1000 101000 341063
 Date Complete: _____

CONDITIONAL USE PERMIT

FEE ATTACHED \$ 1065.00
 (see current fee schedule)

INSTRUCTIONS:

- A Site Review Meeting with city staff is required. Date of Site Review Meeting: November 13, 2025
October 16, 2025
- Submit the application fee, completed application, and appropriate attachments to the Whitefish Planning & Building Department a minimum of **forty-five (45) days prior** to the Whitefish Community Development Board meeting at which this application will be heard.
- The regularly scheduled meeting of the Whitefish City Planning Board is the third Thursday of each month at 6:00PM in the Council Chambers at 418 E 2nd Street.
- After the Community Development Board hearing, the application is forwarded with the Board's recommendation to the next available City Council meeting for hearing and final action.

A. PROJECT INFORMATION:

Project Name: Whitefish Highschool Academic Expansion and Athletic Improvements
 Street Address: 1143 4th st. Whitefish, MT 59937
 Assessor's Tract No.(s) E001283 Lot No(s) Tracts 1A of COS 21575
 Block # N/A Subdivision Name N/A
 Section 21 Township 31N Range 21W

I hereby certify that the information contained or accompanied in this application is true and correct to the best of my knowledge. The signing of this application signifies approval for the Whitefish Staff to be present on the property for routine monitoring and inspection during the approval and development process.

[Signature]
 Owner's Signature**

10/31/25
 Date

Dave Means
 Print Name

[Signature]
 Applicant's Signature

10/31/25
 Date

Shane Jacobs
 Print Name

 Representative's Signature

 Date

 Print Name

**May be signed by the applicant or representative, authorization letter from owner must be attached. If there are multiple owners, a letter authorizing one owner to be the authorized representative for all must be included.

B. APPLICATION CONTENTS:

Attached ALL ITEMS MUST BE INCLUDED - INCOMPLETE APPLICATIONS WILL NOT BE ACCEPTED

- One (1) printed copy and one (1) electronic copy of the application and supplemental materials
- Written description of how the project meets the criteria in Section E
- Site Plan – drawn to scale, which shows in detail the proposed use, property lines and setback lines, existing and proposed buildings, traffic circulation, driveways, parking, landscaping, fencing, signage, all public trees within 50-feet of the property and any unusual topographic features such as slopes, drainage, ridges, etc.
- Will this project provide affordable housing: Yes No If yes, complete a Housing Mitigation Plan
- Where new buildings or additions are proposed, building sketches and elevations must be submitted
- Tree Preservation Plan – show a site plan with trees 6-inch DBH or greater to be preserved with project
- Public Trees – show all public trees to be saved or removed. Any public trees proposed to be removed must be approved by the Director of Parks and Recreation.
- If the project is a multi-family development, complete the **Multi-Family Development Standards Supplemental**
- If the project is a mixed-use or non-residential development, complete the **Mixed-Use and Non-Residential Building Development Standards Supplemental**
- \$100 deposit for sign to be posted on-site for the duration of the review process. (submit a separate check which will be returned to you **after you return the sign to the Planning Office.**)
- Any additional information requested during the pre-application process

When all application materials are submitted to the Planning & Building Department, the application will be scheduled for public hearing before the Community Development Board and City Council.

I understand I am responsible for maintaining the public notice sign on the subject property during the entire public process. I understand I will forfeit my \$100.00 deposit, if I do not return the public notice sign to the Planning & Building Department in good condition after the public review.



Applicant Signature

10/31/25

Date

C. OWNER/APPLICANT INFORMATION

OWNER(S) OF RECORD:

Name: Dave Means Phone: [REDACTED]
Mailing Address: 600 East Second Street
City, State, Zip: Whitefish, MT, 59937
Email: [REDACTED]

APPLICANT (if different than above):

Name: Shane Jacobs, Architect, A&E Design Phone: [REDACTED]
Mailing Address: 40 2nd St. E, Suite 215
City, State, Zip: Kalispell, MT 59901
Email: [REDACTED]

OTHER TECHNICAL/PROFESSIONAL:

Name: _____ Phone: _____
Mailing Address: _____
City, State, Zip: _____
Email: _____

D. DESCRIBE PROPOSED USE:

The subject property is currently developed with the Whitefish high school, fields, accessory structures, and associated parking. This project builds an addition to the west elevation of the existing gymnasium to provide more teaching/classroom spaces. The addition footprint overlays the footprint of an existing portion of the building that will be removed west of the existing gym. It also provides an addition to the southeast corner of the building to create additional CTE classroom space.

This project also upgrades and redevelops the fields associated with the school to include a new track surface, bleacher structure with press box, and a ticketing/ concession/ storage/ restroom facility that is accessory to the high school.

ZONING DISTRICT: WR-1

E. REVIEW CRITERIA: The following criteria form the basis for approval or denial of the Conditional Use Permit. The burden of satisfactorily addressing these criteria lies with the applicant. Review the criteria below and discuss how the proposal conforms to the criteria. If the proposal does not conform to the criteria, describe how it will be mitigated.

1. Describe how the proposal conforms to the applicable goals and policies of the Whitefish City-County Growth Policy.

The school is located within Public/Semi-Public land use designation. This designation recommends developing a Public/Semi-Public zoning designation. This designation is yet to be developed but is intended for schools and municipal government services.

2. Describe how the proposal is consistent with the purpose, intent and applicable provisions of the regulations.

Schools (K-12) are a conditional use within the WR-1 zone. The project design is meeting the setbacks and lot coverage within the zoning district. The building height is below the height of the existing building, although the existing building height was approved through a previous CUP to allow a height of 41'-0".

3. How is the property location suitable for the proposed use? Is there adequate usable land area? Does the access, including emergency vehicle access, meet the current standards? Are environmentally sensitive areas present on the property that would render the site inappropriate for the proposed use?

Access to the public streets met the zoning requirements. Final review of fire department requirements will occur at the time of site and building permit review.

There are no environmental constraints that would render the site inappropriate for development.

4. How are the following design issues addressed on the site plan?
 - a. Parking locations and layout
 - b. Traffic circulation
 - c. Open space
 - d. Fencing/screening
 - e. Landscaping
 - f. Signage
 - g. Undergrounding of new utilities
 - h. Undergrounding of existing utilitiesSee attached sheet.

5. Are all necessary public services and facilities available and adequate? If not, how will public services and facilities be upgraded?
 - a. Sewer
 - b. Water
 - c. Stormwater
 - d. Fire Protection
 - e. Police Protection
 - f. Street (public or private)
 - g. Parks (residential only)
 - h. Sidewalks
 - i. Bike/pedestrian ways – including connectivity to existing and proposed developmentsSee attached sheet.

6. How will your project impact on adjacent properties, the nearby neighborhoods and the community in general? Describe any adverse impacts under the following categories.
 - a. Excessive traffic generation and/or infiltration of traffic into neighborhoods
 - b. Noise, vibration, dust, glare, heat, smoke, fumes, odors

Traffic Generation - the traffic generation for the site will be the same as the current school. There will be increased traffic during construction.

Noise or Vibration - No additional noise or vibration is anticipated to be generated from the proposed use. Noise or vibration associated with construction will be temporary.

Dust, Smoke, Glare, or Heat - No impact is anticipated beyond what could be expected with current use.

Smoke, Fumes, Gas, or Odor - No impact is anticipated.

7. What are the proposed hours of operation?

The High school hours will remain the same as the current operational hours. The current athletics schedule will also remain the same with playoff games being subject to other scheduling.

8. How is the proposal compatible with the surrounding neighborhood and community in general in terms of the following:

- a. Structural bulk and massing
- b. Scale
- c. Context of existing neighborhood
- d. Density
- e. Community Character

a. The additions to the High School will be the same height or less as the existing school.

b. The building is meeting the setbacks in the zone and will not impede on the existing relationships to neighboring buildings any more than the current use.

c. The materiality and design of the building is intended to fit in with more residential aesthetics.

d. The project will not change the density of the neighborhood.

e. The high school has been in this particular location for 70 years. The design of the additions has been carefully thought through to fit in and work well with the existing building. The final building design will be required to have Architectural Review prior to submitting a building application.

9. Please address how this proposal meets the specific development criteria found in 11-3 special provisions for the use requested.

See attached sheet.

4. How are the following design issues addressed on the site plan?

- a. For the academic school day or during athletic events, students and visitors will use all parking on the site. The main student parking lot, bus drop-off and staff parking will remain as currently located. The new parking lot offsets any parking lost through the building additions.
- b. Access for both academic school day and athletic events will be at the E 4th Street and Pine Street, as the site currently functions. There will be no changes to the access to the site.
- c. The additions have been designed to be as tight to the existing building as possible continuing with the two-story footprint to maximize open space. The size of the athletic buildings has additionally been minimized to encourage as much open space as possible to remain designated at the school. No open space dedication is required within the conditional use permit.
- d. New fencing is proposed around the track field to help minimize unauthorized access to the new facility while still allowing community access to the track under signed hours.
- e. Existing landscaping along the edges of the site will be maintained as much as possible. Some new landscaping will be added in the corners of the track and field sites, as well as near the new additions to the building and at improved parking. A detailed landscaping plan will be reviewed at the time of building permit.
- f. All signage shall comply with the city's sign regulations.
- g/h. New and existing utilities will be placed or remain underground in accordance with all City regulations and the approved plan set.

5. Are all necessary public services and facilities available and adequate? If not, how will public services and facilities be upgraded?

- a. City of Whitefish water and sewer services and facilities are available and adequate to serve the project.
- b. Stormwater public services are available, but upgrades to certain portions of the existing systems will be necessary. The existing stormwater infrastructure drains to two separate locations. Much of the academics portion of the project currently drains to the Pine Avenue stormwater system, while majority of the athletics portion drains straight to Cow Creek. The proposed stormwater design separates the athletic and academic stormwater basins to route the polluted water (i.e. parking lots, roadways, all driving surfaces) to the Pine Avenue System where it will be treated by a water quality device prior to discharge into the Pine Avenue System. The drainage basin for the athletics portion of the project collects stormwater from non-polluted surfaces (i.e. the football field, practice areas, non-driving surfaces) where it will be routed to Cow Creek. Both stormwater systems will utilize proposed and existing stormwater conveyance infrastructure. It should also be noted that neither stormwater system will allow stormwater to leave the site at a rate that is greater than it has historically. The city will review and approve the stormwater infrastructure plan prior to installation.
- c. The Whitefish Fire Dept. serves this site and response times are good. Access will be reviewed by the Fire Department at the time of building permit.
- e. The Whitefish Police Dept. serves this site and response times are good.
- f. The site is served by E 4th Street and Pine Avenue. Fir Street is at the northeast intersection of the project and enters the parking lot.
- g. N/A
- h. Sidewalks are provided on all sides of the site, with an alternate to provide a continuous sidewalk along East 4th Street north of the new track.
- i. Bike and pedestrian ways are available on all sides of the site. A new pedestrian way will be provided within the site on the west side of the track and field to provide better access from East 4th Street through the site to Muldown Elementary.

9. Please address how this proposal meets the specific development criteria found in 11-3 special provisions for the use requested.

Per 11-3-2: Accessory Buildings: Many of the current accessory buildings on site will be removed and replaced with the more thoughtfully designed accessory buildings in this submittal.

Per 11-3-3 Architectural Standards: The design of the additions has been carefully thought through to fit in and work well with the existing building. The final building design will be required to have Architectural Review prior to submitting a building application.

Per 11-3-5 Building Height: The overall building height is intended to be within the 35'-0" height limit and certainly under the previously approved 41'-0".

Per 11-3-8 Clear Vision Triangle: This is provided at all connection of the site to roadways.

Per 11-3-11 Fences and Retaining Walls: All new fences around the property do not exceed 6'-0". Per item 4, open wire fences exceeding the above height (4'-0" on front yards) may be built around school when necessary for the safety or restraint of occupants. There are no retaining walls planned.

Per 11-3-25 Outdoor Lighting Standards: Two flagpoles are proposed on site (there is currently one existing on site that will be relocated) and both will be lighted. Per item 6, the maximum lumen output for uplighting is 1300 lumens will be met. Per item 9, luminaries used for playing fields are exempt from the height restriction provided all other provisions of this section are met and light is used only while the field is in use. This provision will be met. Parking lot luminaries are 25'-0" existing and will be maintained at this height, an illumination plan showing location, intensity, and light trespass will be provided when the project is submitted for building permit.

Per 11-3-29 Water Quality Protection: The only wetland/ stream area located within the vicinity of the project is Cow Creek. The development will adhere to all of the applicable requirements and regulations laid out in 11-3-29 and ensure continued protection to this wetland/ stream area. This project will also be reviewed by Public Works prior to any approvals to ensure compliance with all City standards.

Per 11-3-33 Erosion and Sediment Control: An erosion and sediment control plan will be provided with the building permit application.



Conditional Use Permit
November 3rd, 2025

WHITEFISH HIGH SCHOOL ACADEMIC EXPANSION AND ATHLETIC IMPROVEMENTS



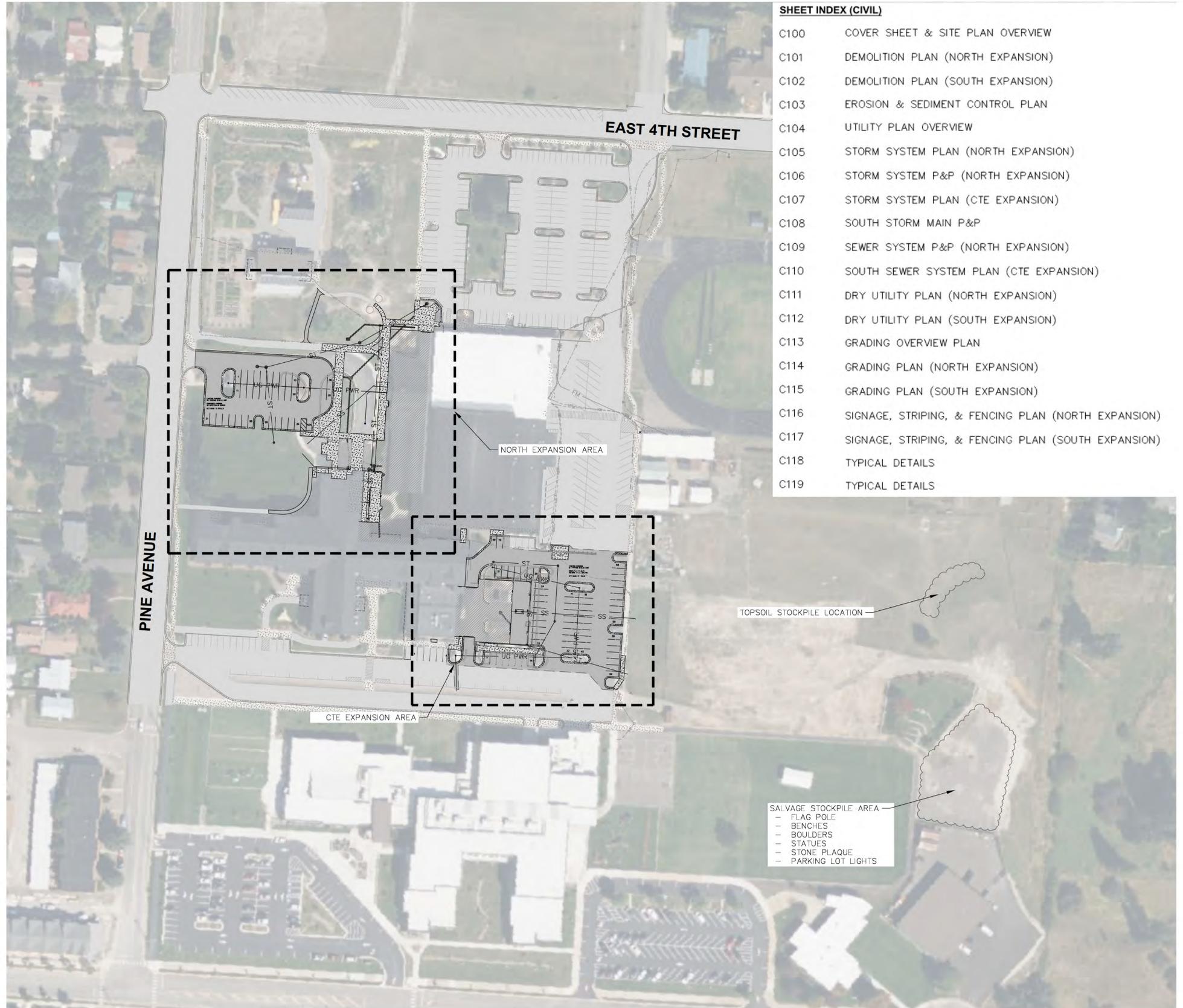
VICINITY MAP NTS



**ESTIMATED CIVIL QUANTITIES
WHITEFISH HIGH SCHOOL - ACADEMICS - 100% DD
WHITEFISH, MT**

By: BMT
Date: 10/1/2025

Item No.	Quantity	Unit	Unit Description
1	1	LS	Mobilization, Bonding, and Insurance
2	2.53	Acre	Site Preparation & Exterior Demolition
3	11062	SF	Building Demolition (Footprint)
4	1	LS	Construction Survey
5	1	LS	Temporary Erosion & Sediment Controls
6	1	LS	Material Testing
7	8000	CY	Excavation (Placeholder - Estimated)
8	0	CY	Embankment (Outside Building Footprint)
9	2000	CY	Imported Structural Fill (Placeholder, for Constructability)
10	1	EA	Existing Sanitary Sewer Main Connection
11	1	EA	48" Sanitary Sewer Manhole
12	1	EA	Oil/Sand Separator (1,500 Gallons)
13	3	EA	4" Sewer Service with Cleanout (SDR 35 PVC)
14	1	EA	Existing Storm Main Connection
15	1	EA	Existing Storm Manhole Modification
16	439	LF	4" Storm Drain Pipe (SDR 35 PVC) - Roof Connections
17	147	LF	6" Storm Drain Pipe (SDR 35 PVC) - Roof Conveyance
18	333	LF	8" Storm Drain Pipe (SDR 35 PVC) - Laterals
19	329	LF	10" Storm Drain Pipe (SDR 35 PVC) - Roof Conveyance
20	258	LF	15" Storm Drain Pipe (SDR 35 PVC) - Main Line
21	25	LF	Sidewalk Trench Grate
22	3	EA	48" Storm Drain Manhole - Combination Manhole Inlet
23	1	EA	48" Storm Water Quality Treatment Device (4 FT CDS)
24	6	EA	30" Storm Drain Inlet
25	5633	SY	Geotextile - Stabilization Fabric
26	2191	CY	Crushed Subbase Course (14" Thick)
27	939	CY	Crushed Base Course (6" Thick)
28	1663	LF	Concrete Curb and Gutter
29	31	EA	Parking Bumpers
30	104	SY	3" Asphalt Sidewalks with 9" Crushed Base Course
31	1393	SY	4" Concrete Sidewalk with 6" Crushed Base Course
32	82	SF	Truncated Domes
33	64	SY	6" Reinforced Concrete with 6" Crushed Base Course
34	18	EA	Bollards
35	135	LF	Fencing
36	3	EA	Fencing - 4-Foot Man Gate
37	2	EA	Fencing - 12-Foot Sliding Cantilever Gate
38	1	LS	Trash Enclosure (Above Ground Elements)
39	1263	TON	Asphalt Concrete Pavement (4" Thick)
40	2111	LF	4" White Parking Lot Striping
41	20	EA	Signs (Placeholder)
42	2	EA	Flag Pole Relocation (new base)
43	104	LF	Gas Relocation to CSE
44	328	LF	2" Conduits (Data Relocations, PVC SCH 40)
45	2	EA	Pull Box (Data Relocations)
46	738	LF	1" Conduit - for Lights (PVC SCH 40)
47	4	EA	Existing Light Poles (relocated) - Parking Lot (with new bases)
48	2	EA	New Light Poles - Parking Lot (with bases)



SHEET INDEX (CIVIL)

C100	COVER SHEET & SITE PLAN OVERVIEW
C101	DEMOLITION PLAN (NORTH EXPANSION)
C102	DEMOLITION PLAN (SOUTH EXPANSION)
C103	EROSION & SEDIMENT CONTROL PLAN
C104	UTILITY PLAN OVERVIEW
C105	STORM SYSTEM PLAN (NORTH EXPANSION)
C106	STORM SYSTEM P&P (NORTH EXPANSION)
C107	STORM SYSTEM PLAN (CTE EXPANSION)
C108	SOUTH STORM MAIN P&P
C109	SEWER SYSTEM P&P (NORTH EXPANSION)
C110	SOUTH SEWER SYSTEM PLAN (CTE EXPANSION)
C111	DRY UTILITY PLAN (NORTH EXPANSION)
C112	DRY UTILITY PLAN (SOUTH EXPANSION)
C113	GRADING OVERVIEW PLAN
C114	GRADING PLAN (NORTH EXPANSION)
C115	GRADING PLAN (SOUTH EXPANSION)
C116	SIGNAGE, STRIPING, & FENCING PLAN (NORTH EXPANSION)
C117	SIGNAGE, STRIPING, & FENCING PLAN (SOUTH EXPANSION)
C118	TYPICAL DETAILS
C119	TYPICAL DETAILS



sheet
project
owner

COVER SHEET & SITE OVERVIEW
WHITEFISH HIGH SCHOOL
WHITEFISH SCHOOL DISTRICT

project # **24-19**
revision date

Phase 1 - Academics
NOT FOR CONSTRUCTION



NORTH



issue date
10.01.25

C100

GENERAL NOTES:

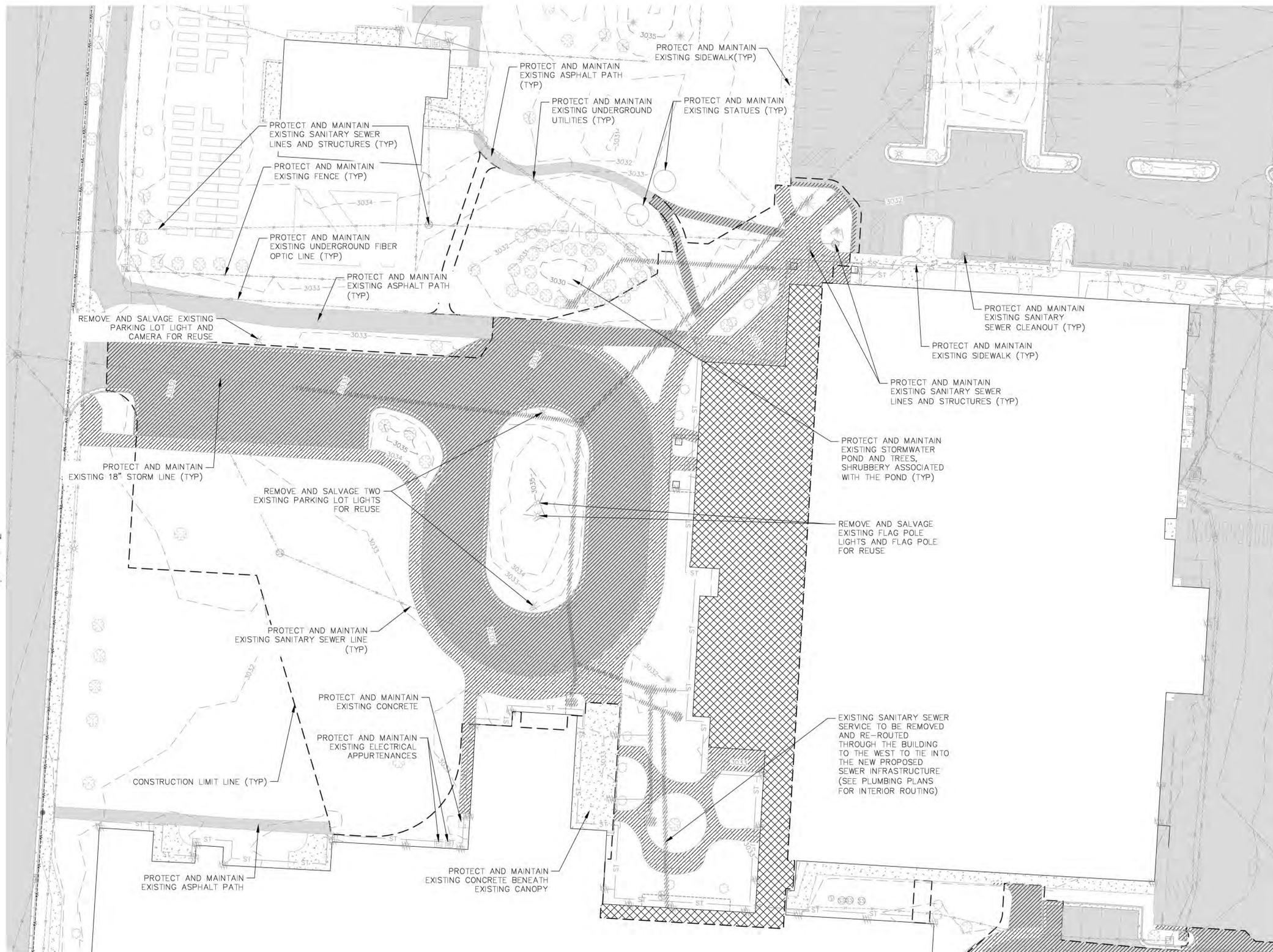
1. GENERAL NOTES FOR SHEETS INVOLVING CIVIL WORK ARE SHOWN ON THIS SHEET.
2. UNLESS SHOWN ON THESE DRAWINGS, ALL WORK SHALL CONFORM TO MONTANA PUBLIC WORKS STANDARD SPECIFICATIONS (CURRENT EDITION) AND THE CITY OF WHITEFISH ENGINEERING STANDARDS (CURRENT EDITION). AMENDMENTS TO MONTANA PUBLIC WORKS STANDARD SPECIFICATIONS HAVE BEEN DEVELOPED FOR THIS PROJECT. THE CONTRACTOR SHALL CONTACT THE ENGINEER FOR THOSE AMENDMENTS.
3. PRIOR TO STARTING ANY UTILITY RELATED WORK, THE CONTRACTOR SHALL SCHEDULE A PRECONSTRUCTION MEETING WITH THE PUBLIC WORKS DEPARTMENT.
4. FIRE DEPARTMENT AND EMERGENCY SERVICES SHALL BE PROVIDED ACCESS TO THE SITE DURING CONSTRUCTION. CONSTRUCTION WORK, STAGING, AND RELATED IMPACTS SHALL NOT EXTEND OUTSIDE OF THE PROJECT LIMITS AS SHOWN ON THE DRAWINGS.
5. A CITY OF WHITEFISH EXCAVATION PERMIT SHALL BE SECURED BY THE CONTRACTOR PRIOR TO COMMENCING WITH ANY WORK WITHIN CITY RIGHT-OF-WAYS. THE CONTRACTOR SHALL COORDINATE AND RECEIVE APPROVAL OF CONSTRUCTION RELATED CITY RIGHT-OF-WAY CLOSURES WITH THE APPROPRIATE CITY OFFICIALS PRIOR TO SAID CLOSURE.
6. EXISTING UNDERGROUND UTILITIES SHOWN ON THESE DRAWINGS ARE FROM THE BEST INFORMATION AVAILABLE AT THE TIME OF DESIGN. ACCURACY OF THIS INFORMATION IS NOT GUARANTEED AND SHALL BE VERIFIED BY THE CONTRACTOR. IT IS THE CONTRACTOR'S RESPONSIBILITY TO CONTACT EACH UTILITY COMPANY PRIOR TO ANY EXCAVATION ACTIVITIES. THE CONTRACTOR IS ALSO RESPONSIBLE FOR COORDINATING ALL UTILITY LOCATES PER STATE LAWS.
7. LOCATION AND DEPTHS OF EXISTING UTILITIES SHOWN ARE APPROXIMATE AND SHALL BE VERIFIED BY THE CONTRACTOR. THE CONTRACTOR SHALL DETERMINE POSITION AND DEPTH OF EACH UTILITY IN ADVANCE OF MAKING A CONNECTION.
8. ALL STRUCTURES, FOUNDATIONS, ASPHALT, AND CONCRETE REMOVED SHALL BE LEGALLY DISPOSED OF AT THE COUNTY LANDFILL. ALTERNATIVE DISPOSAL METHODS MUST RECEIVE ADVANCED APPROVAL BY THE OWNER. ALL DEPRESSIONS/VOIDS LEFT BY DEMOLITION ACTIVITIES SHALL BE BACKFILLED WITH SUITABLE FILL MATERIAL PER MPWSS 02230. THESE DRAWINGS DO NOT DETAIL THE REMOVAL OR PROTECTION OF EXISTING TREES. SEE A&E'S TREE PRESERVATION PLAN FOR ADDITIONAL INFORMATION.
9. MINIMAL HORIZONTAL STAKING DATA IS SHOWN ON THESE DRAWINGS WITH THE ASSUMPTION THAT THE CONTRACTOR CAN SUPPLEMENT USING DIGITAL FILES PROVIDED BY THE CIVIL ENGINEER FOR STAKING.
10. SEE ARCHITECTURAL DRAWINGS FOR EXACT LIMITS OF BUILDING REMOVAL. AREAS SHOWN ON THIS SHEET ARE APPROXIMATE.
11. REMOVE AND SALVAGE ALL EXISTING SIGNS FOR REUSE.

DEMO NOTES:

1. CONTOURS ON THIS SHEET ARE EXISTING CONTOURS.
2. PROTECT AND MAINTAIN ALL EXISTING ASPHALT, CURB AND GUTTER, AND CONCRETE FLATWORK, UNLESS OTHERWISE SHOWN ON THE DRAWINGS.
3. ALL EXISTING TOPSOIL WITHIN THE CONSTRUCTION LIMITS SHALL BE REMOVED AND STOCKPILES FOR REUSE. SEE TOPSOIL STOCKPILE LOCATION ON SHEET C100.
4. THE SITE SURVEY INFORMATION WAS PROVIDED BY OTHERS (TD&H).

SHADING LEGEND:

	EXISTING ASPHALT TO REMAIN		EXISTING ASPHALT TO BE REMOVED
	EXISTING CONCRETE TO REMAIN		EXISTING CONCRETE TO BE REMOVED
	EXISTING PIPE TO BE REMOVED		EXISTING BUILDING TO BE REMOVED



UNDER DEVELOPMENT

POINT	NORTHING	EASTING	ELEVATION	NOTES



sheet DEMOLITION PLAN (NORTH EXPANSION)
 project WHITEFISH HIGH SCHOOL
 owner WHITEFISH SCHOOL DISTRICT

project # 24-19
 revision date

Phase 1 - Academics
 NOT FOR CONSTRUCTION



NORTH



issue date
 10.01.25

C101

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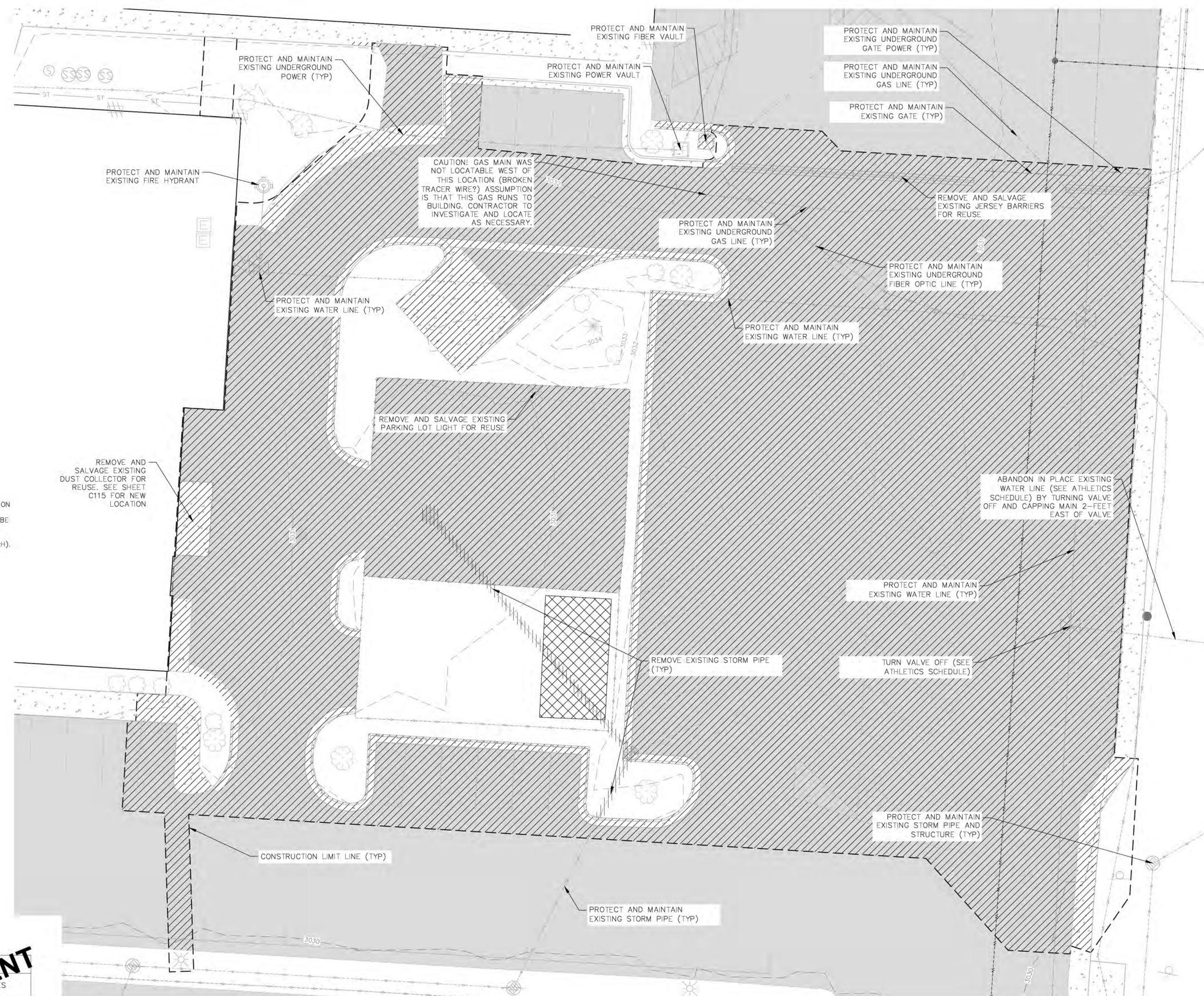
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	EXISTING ASPHALT TO REMAIN		EXISTING ASPHALT TO BE REMOVED
	EXISTING CONCRETE TO REMAIN		EXISTING CONCRETE TO BE REMOVED
	EXISTING PIPE TO BE REMOVED		EXISTING BUILDING TO BE REMOVED



UNDER DEVELOPMENT

SURVEY CONTROL POINT TABLE				
POINT	NORTHING	EASTING	ELEVATION	NOTES



DEMOLITION PLAN (SOUTH EXPANSION)
WHITEFISH HIGH SCHOOL
 project owner WHITEFISH SCHOOL DISTRICT

project # **24-19**
 revision date

Phase 1 - Academics
NOT FOR CONSTRUCTION



issue date
10.01.25
C102



C:\Users\TumarPak\OneDrive\Documents\Whitefish High School\Project Files\Sheets\C102 - Demolition Plan (South Expansion) - WPHS.dwg Oct 01, 2025 - 12:42pm

FOR REFERENCE ONLY
NOT FOR CONSTRUCTION



sheet COVER SHEET & SITE OVERVIEW
project WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS
owner WHITEFISH HIGH SCHOOL

project # 24-19
No. Description Date
phase 2 - Athletics
100% DESIGN DEVELOPMENT
NOT FOR CONSTRUCTION

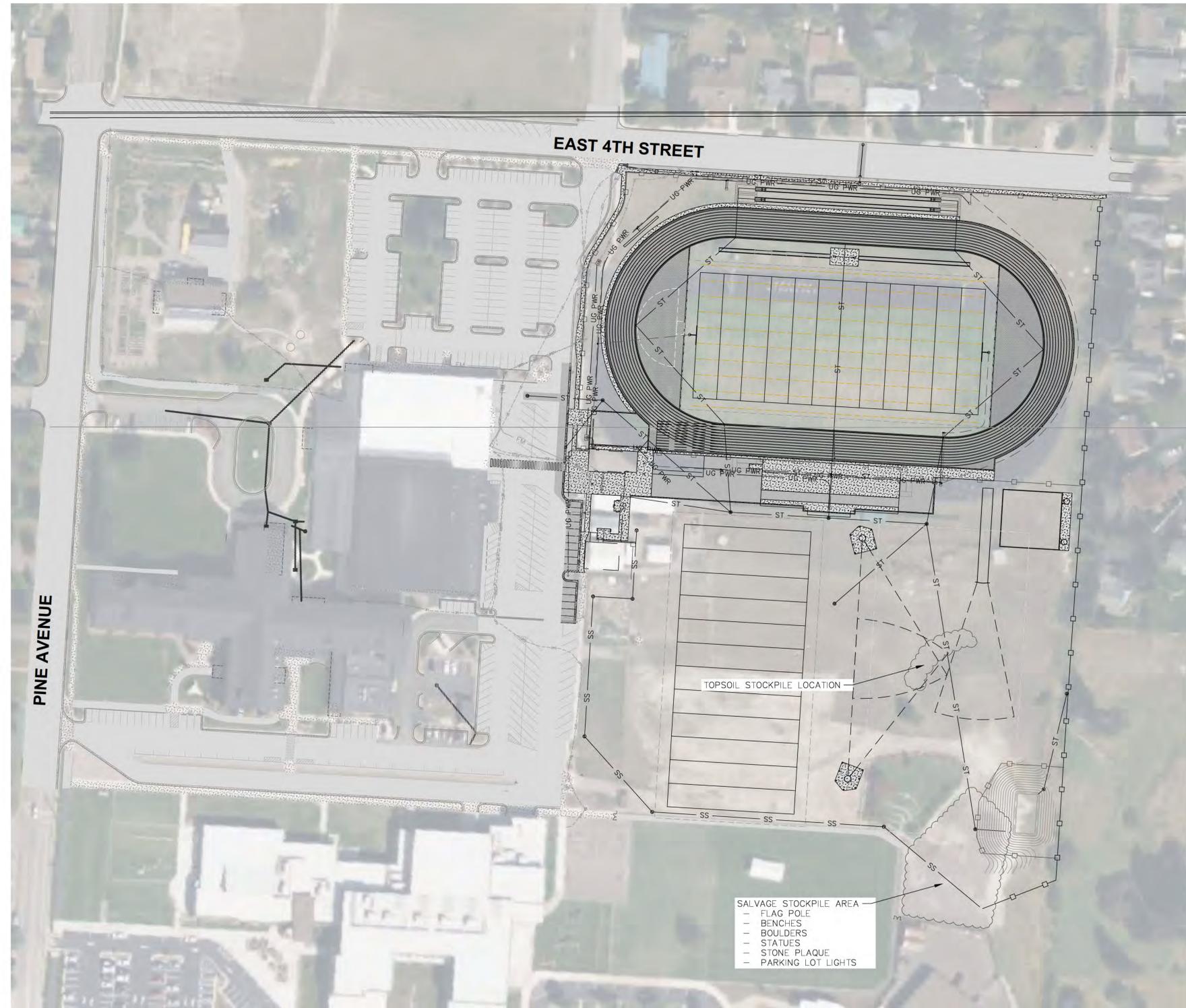


issue date
10.22.25
C100



VICINITY MAP NTS

 ESTIMATED CIVIL QUANTITIES WHITEFISH HIGH SCHOOL - ATHLETICS - 100% DD WHITEFISH, MT			
By: BMT			
Date: 10/22/2025			
Item No.	Quantity	Unit	Unit Description
1	1	LS	Mobilization, Bonding, and Insurance
2	12	Acre	Site Preparation & Demolition
3	1	LS	Construction Survey
4	1	LS	Temporary Erosion & Sediment Controls
5	1	LS	Material Testing
6	20000	CY	Excavation (Placeholder - Estimated)
7	1000	CY	Embankment (Placeholder - Estimated)
8	1	LS	Storm Drain Pond
9	1	EA	Existing Sanitary Sewer Main Connection
10	6	EA	48" Sanitary Sewer Manhole
11	894	LF	8" Sewer Main Pipe (SDR 35 PVC)
12	149	LF	4" Sewer Service with Cleanout (SDR 35 PVC)
13	4	EA	Existing Storm Main Connection/Modification
14	3600	LF	4" Perforated Corrugated Pipe - Field Lateral Drain
15	319	LF	4" Storm Drain Pipe (SDR 35 PVC) - Track, Field, Event Conveyance
16	101	LF	6" Storm Drain Pipe (SDR 35 PVC) - Track, Field, Event Conveyance
17	1501	LF	8" Storm Drain Pipe (SDR 35 PVC)
18	778	LF	12" Storm Drain Pipe (SDR 35 PVC) - Main Line
19	124	LF	18" Storm Drain Pipe (SDR 35 PVC) - Main Line
20	432	LF	21" Storm Drain Pipe (SDR 35 PVC) - Main Line
21	1300	LF	Track Trench Grate with Concrete
22	1	EA	48" Storm Drain Flow Control Device
23	6	EA	48" Storm Drain Manhole
24	5	EA	48" Storm Drain Combination Manhole Inlet
25	3	EA	30" Storm Drain Inlet
26	1	EA	Water Service - 2" (HDPE)
27	1	EA	Meter Pit - 2"
28	1823	LF	2" Conduit (SCH 40 PVC)
29	235	LF	3" Conduit (SCH 40 PVC)
30	14	EA	Pull Box
31	1	EA	Transformer Vault
32	9030	SY	Geotextile - Stabilization Fabric
33	2709	CY	Crushed Subbase Course (12" Thick - Track and Concourse Pavement)
34	266	CY	Crushed Subbase Course (14" Thick - Parking Lot Pavement)
35	1354	CY	Crushed Base Course (6" Thick - Track and Concourse Pavement)
36	114	CY	Crushed Base Course (6" Thick - Parking Lot Pavement)
37	382	LF	Concrete Curb and Gutter - Parking Lot
38	10	LF	Concrete Curb - Straight Curb
39	2148	LF	Concrete Curb - 12" Wide
40	1542	TON	3" Asphalt (Track & Concourse)
41	63425	SF	Track Surfacing
42	141	TON	4" Asphalt (Parking Lot)
43	40	SF	Truncated Domes
44	2724	SY	4" Concrete with 6" Crushed Base Course
45	580	SY	6" Reinforced Concrete with 6" Crushed Base Course
46	2	EA	Event - Double Long Jump - Complete
47	1	EA	Event - Double Front Pole Vault - Complete
48	1	EA	Event - Discus (Stationary) - Complete
49	1	EA	Event - Discus (Portable) - Complete
50	1	EA	Event - Shot Put (Two Rings) - Complete
51	1	EA	Event - Shot Put (Three Additional Rings) - Complete
52	1918	LF	Fencing - 6-Foot Tall Chainlink Fence
53	2	EA	Fencing - 4-Foot Man Gate
54	1	LS	Fencing - Ticketing Gate System
55	2	EA	Fencing - 8-Foot Swinging Gate
56	1	EA	Fencing - 14-Foot Swinging Gate
57	1	EA	Fencing - 16-Foot Swinging Gate
58	1	LS	Track Striping
59	251	LF	4" White Parking Lot Striping
60	230	LF	24" White Parking Lot Striping
61	2	EA	Goal Posts (Game Field)
62	2	EA	Goal Posts (Practice Field)
63	20	EA	Signs (Placeholder)
64	1	EA	Flag Pole
65	2	EA	New Parking Lot Lights (with Bases)
66	4	EA	Stadium Field Lights (with Bases)



SHEET INDEX (CIVIL)

1 10	COVER SHEET & SITE PLAN OVERVIEW	C112	SEWER MAIN PLAN
1 11	DEMOLITION PLAN (NORTH EXPANSION)	C113	SEWER MAIN P&P
1 12	EROSION & SEDIMENT CONTROL PLAN	C114	SEWER MAIN P&P
1 13	SITE PLAN (WITH ALTERNATES)	C115	WATER SERVICE PLAN
1 14	UTILITY PLAN OVERVIEW	C116	DRY UTILITY PLAN
1 15	STORM SYSTEM PLAN OVERVIEW	C117	GRADING PLAN (NORTH EXPANSION)
1 16	STORM SYSTEM MAIN P&P (MAIN EXPANSION)	C118	GRADING PLAN (SOUTH EXPANSION)
1 17	STORM SYSTEM MAIN P&P (MAIN EXPANSION & POND)	C119	GRADING PLAN (4TH STREET SIDEWALK)
1 18	STORM SYSTEM (POND GRADING)	C120	SIGNAGE, STRIPING, & FENCING PLAN
1 19	STORM SYSTEM PLAN (FIELD DRAINAGE OVERVIEW)	C121	TYPICAL DETAILS
110	STORM SYSTEM P&P (FIELD DRAINAGE)	C122	TYPICAL DETAILS
111	STORM SYSTEM P&P (4TH STREET SYSTEM)	C123	TYPICAL DETAILS



NORTH



GENERAL NOTES:

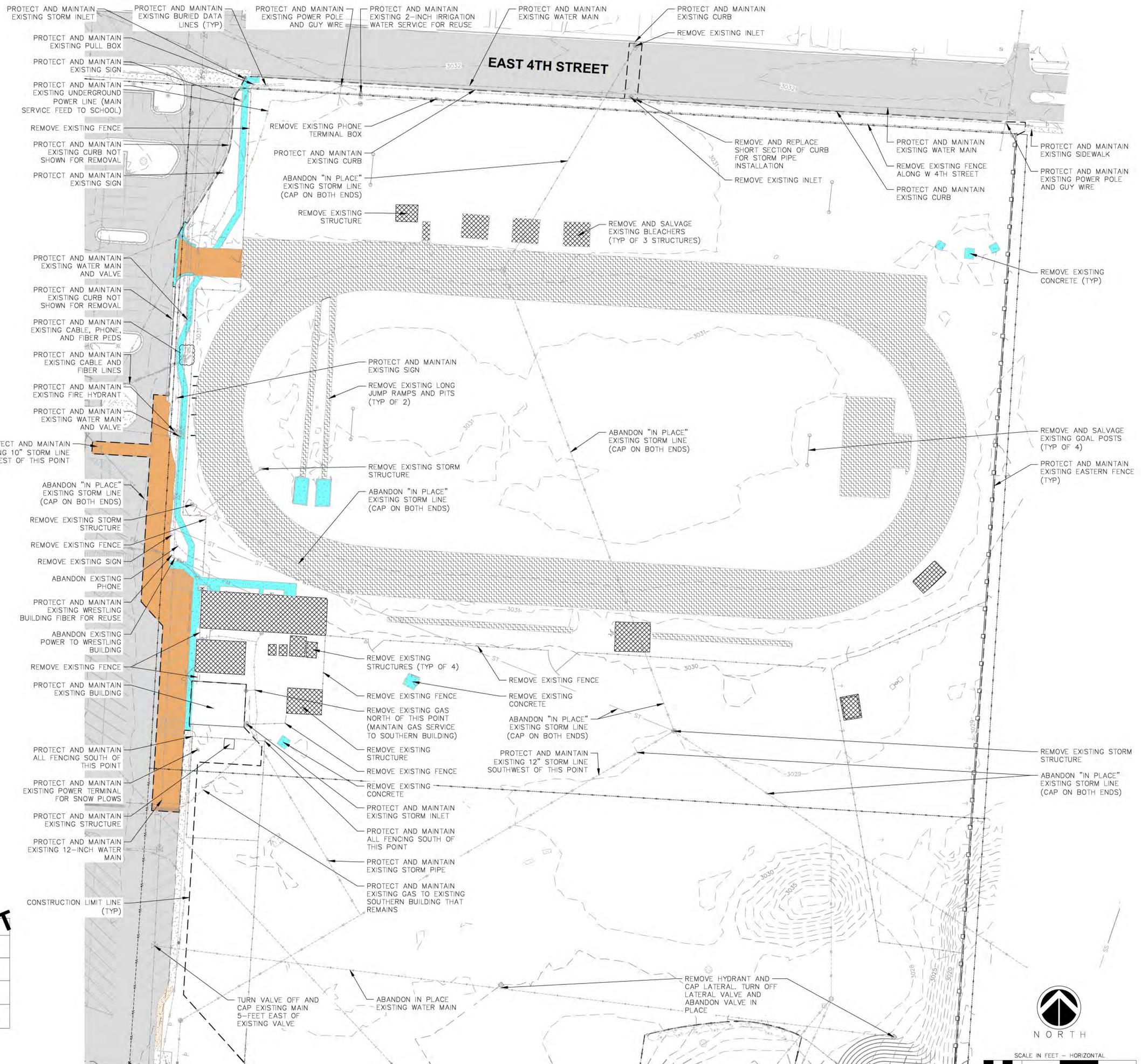
- GENERAL NOTES FOR SHEETS INVOLVING CIVIL WORK ARE SHOWN ON THIS SHEET.
- UNLESS SHOWN ON THESE DRAWINGS, ALL WORK SHALL CONFORM TO MONTANA PUBLIC WORKS STANDARD SPECIFICATIONS (CURRENT EDITION) AND THE CITY OF WHITEFISH ENGINEERING STANDARDS (CURRENT EDITION). AMENDMENTS TO MONTANA PUBLIC WORKS STANDARD SPECIFICATIONS HAVE BEEN DEVELOPED FOR THIS PROJECT. THE CONTRACTOR SHALL CONTACT THE ENGINEER FOR THOSE AMENDMENTS.
- PRIOR TO STARTING ANY UTILITY RELATED WORK, THE CONTRACTOR SHALL SCHEDULE A PRECONSTRUCTION MEETING WITH THE PUBLIC WORKS DEPARTMENT.
- FIRE DEPARTMENT AND EMERGENCY SERVICES SHALL BE PROVIDED ACCESS TO THE SITE DURING CONSTRUCTION. CONSTRUCTION WORK, STAGING, AND RELATED IMPACTS SHALL NOT EXTEND OUTSIDE OF THE PROJECT LIMITS AS SHOWN ON THE DRAWINGS.
- A CITY OF WHITEFISH EXCAVATION PERMIT SHALL BE SECURED BY THE CONTRACTOR PRIOR TO COMMENCING WITH ANY WORK WITHIN CITY RIGHT-OF-WAYS. THE CONTRACTOR SHALL COORDINATE AND RECEIVE APPROVAL OF CONSTRUCTION RELATED CITY RIGHT-OF-WAY CLOSURES WITH THE APPROPRIATE CITY OFFICIALS PRIOR TO SAID CLOSURE.
- EXISTING UNDERGROUND UTILITIES SHOWN ON THESE DRAWINGS ARE FROM THE BEST INFORMATION AVAILABLE AT THE TIME OF DESIGN. ACCURACY OF THIS INFORMATION IS NOT GUARANTEED AND SHALL BE VERIFIED BY THE CONTRACTOR. IT IS THE CONTRACTOR'S RESPONSIBILITY TO CONTACT EACH UTILITY COMPANY PRIOR TO ANY EXCAVATION ACTIVITIES. THE CONTRACTOR IS ALSO RESPONSIBLE FOR COORDINATING ALL UTILITY LOCATES PER STATE LAWS.
- LOCATION AND DEPTHS OF EXISTING UTILITIES SHOWN ARE APPROXIMATE AND SHALL BE VERIFIED BY THE CONTRACTOR. THE CONTRACTOR SHALL DETERMINE POSITION AND DEPTH OF EACH UTILITY IN ADVANCE OF MAKING A CONNECTION.
- ALL STRUCTURES, FOUNDATIONS, ASPHALT, AND CONCRETE REMOVED SHALL BE LEGALLY DISPOSED OF AT THE COUNTY LANDFILL. ALTERNATIVE DISPOSAL METHODS MUST RECEIVE ADVANCED APPROVAL BY THE OWNER. ALL DEPRESSIONS/VOIDS LEFT BY DEMOLITION ACTIVITIES SHALL BE BACKFILLED WITH SUITABLE FILL MATERIAL PER MPWSS 02230.
- THESE DRAWINGS DO NOT DETAIL THE REMOVAL OR PROTECTION OF EXISTING TREES. SEE A&E'S TREE PRESERVATION PLAN FOR ADDITIONAL INFORMATION.
- MINIMAL HORIZONTAL STAKING DATA IS SHOWN ON THESE DRAWINGS WITH THE ASSUMPTION THAT THE CONTRACTOR CAN SUPPLEMENT USING DIGITAL FILES PROVIDED BY THE CIVIL ENGINEER FOR STAKING.
- REMOVE AND SALVAGE ALL EXISTING SIGNS FOR REUSE.

DEMO NOTES:

- CONTOURS ON THIS SHEET ARE EXISTING CONTOURS. PROTECT AND MAINTAIN ALL EXISTING ASPHALT, CURB AND GUTTER, AND CONCRETE FLATWORK, UNLESS OTHERWISE SHOWN ON THE DRAWINGS.
- ALL EXISTING TOPSOIL WITHIN THE CONSTRUCTION LIMITS SHALL BE REMOVED AND STOCKPILES FOR REUSE. SEE TOPSOIL STOCKPILE LOCATION ON SHEET C100.
- THE SITE SURVEY INFORMATION WAS PROVIDED BY OTHERS (TD&H).

SHADING LEGEND:

	EXISTING ASPHALT TO REMAIN		EXISTING ASPHALT TO BE REMOVED
	EXISTING CONCRETE TO REMAIN		EXISTING CONCRETE TO BE REMOVED
	EXISTING PIPE TO BE REMOVED		EXISTING BUILDING TO BE REMOVED
	EXISTING TRACK TO BE REMOVED		



UNDER DEVELOPMENT

SURVEY CONTROL POINT TABLE			
POINT	NORTHING	EASTING	ELEVATION

FOR REFERENCE ONLY FOR CONSTRUCTION



DEMOLITION PLAN (NORTH EXPANSION)
 WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS
 WHITEFISH HIGH SCHOOL

project # 24-19

No. Description Date

phase 2 - Athletics
 100% DESIGN DEVELOPMENT

NOT FOR CONSTRUCTION



issue date
 10.22.25

C101

C:\Users\Tanner\Public\CD\2025\Whitefish High School\Project Plans\Sheets\Utilities\C101 - Demolition Plan (North Expansion) - WF HS - Athletics.dwg Oct 22, 2025 - 3:36pm



Technical Memorandum

TO: A&E Design, Inc.

FROM: Brandon Theis, PE
Civil Solutions, Inc.
btheis@civilsolutionsmt.com

DATE: December 9th, 2025

SUBJECT: Whitefish High School – Parking Inventory

A recent site visit was made to complete an existing parking inventory at the Whitefish High School. The site consisted of seven (7) different categories of parking stalls throughout the campus. **Overall, the campus had 368 “general” parking stalls.** In addition to this, the campus had 10 bus stalls, and 7 ADA stalls.

The faculty parking number includes two (2) stalls on the east side of the school signed “Reserved” as well as the three (3) music faculty stalls on the north side of the school. The temporary parking loop on the west side of the school includes 12 general stalls in addition to 1 ADA parking stall. The 12 perpendicular stalls on the west side of the school are signed as “Visitor Parking Only”. The 40 stalls on the north side of East 4th Street were included in the student parking total despite being owned by the City of Whitefish rather than the school. Please see the below table for the Whitefish High School parking stall inventory as of April 23, 2025:

“General” Parking Stalls	Count
Student	241
Faculty	103
Temporary	12
Visitor	12
Total “General” Parking Stalls =	368
Additional Parking Stalls	Count
Bus	10
ADA (Standard)	4
ADA (Van Accessible)	3

Please see the enclosed exhibit that further shows the existing parking categories, counts, and locations.

Proposed Parking Changes

At the North Expansion, on the west side of the school, the existing 12 stalls in the temporary parking loop and 12 perpendicular stalls are being removed as part of this project. The proposed parking lot for the North Expansion will include 36 parking stalls for a net gain of 12 stalls on the west side of the school. The one existing standard ADA parking stall in this area is being replaced with one van accessible ADA parking stall in the proposed parking lot. In summary, the west side of the high school will receive an increase of 12 parking stalls, and the existing standard ADA stall will be upgraded to a van accessible ADA stall.

At the South Expansion side of the school, where the CTE expansion is planned, there are 70 existing stalls that are currently planned to be removed as part of this project. The proposed parking lot for the CTE expansion includes 82 parking stalls, as well as a van accessible ADA stall, for a net gain of 12 parking stalls on the south side of the school.

North Expansion	Count
Existing General Stalls	24
Existing ADA Stalls	1
Proposed General Stalls	36
Proposed ADA Stalls (Van Accessible)	1
Net Gain (General Stalls)	+12
<hr/>	
South Expansion	Count
Existing General Stalls	70
Proposed General Stalls	82
Net Gain (General Stalls)	+12

Please see the enclosed exhibit that further shows the proposed parking lots for the site.

Summary

The Whitefish School District CUP from 2012 supported maintaining the existing 383 parking spaces available to the school at that time. Prior to the current project, there were only 368 parking spaces available to the high school, 15 spaces less than the 2012 CUP required. The current project proposes adding 24 parking spaces to the site through the reconstruction of the North expansion parking lot and reconfiguration of the South expansion parking lot. This increase will result in 392 parking spaces for the school, 9 more parking spaces than was originally required by the 2012 CUP.

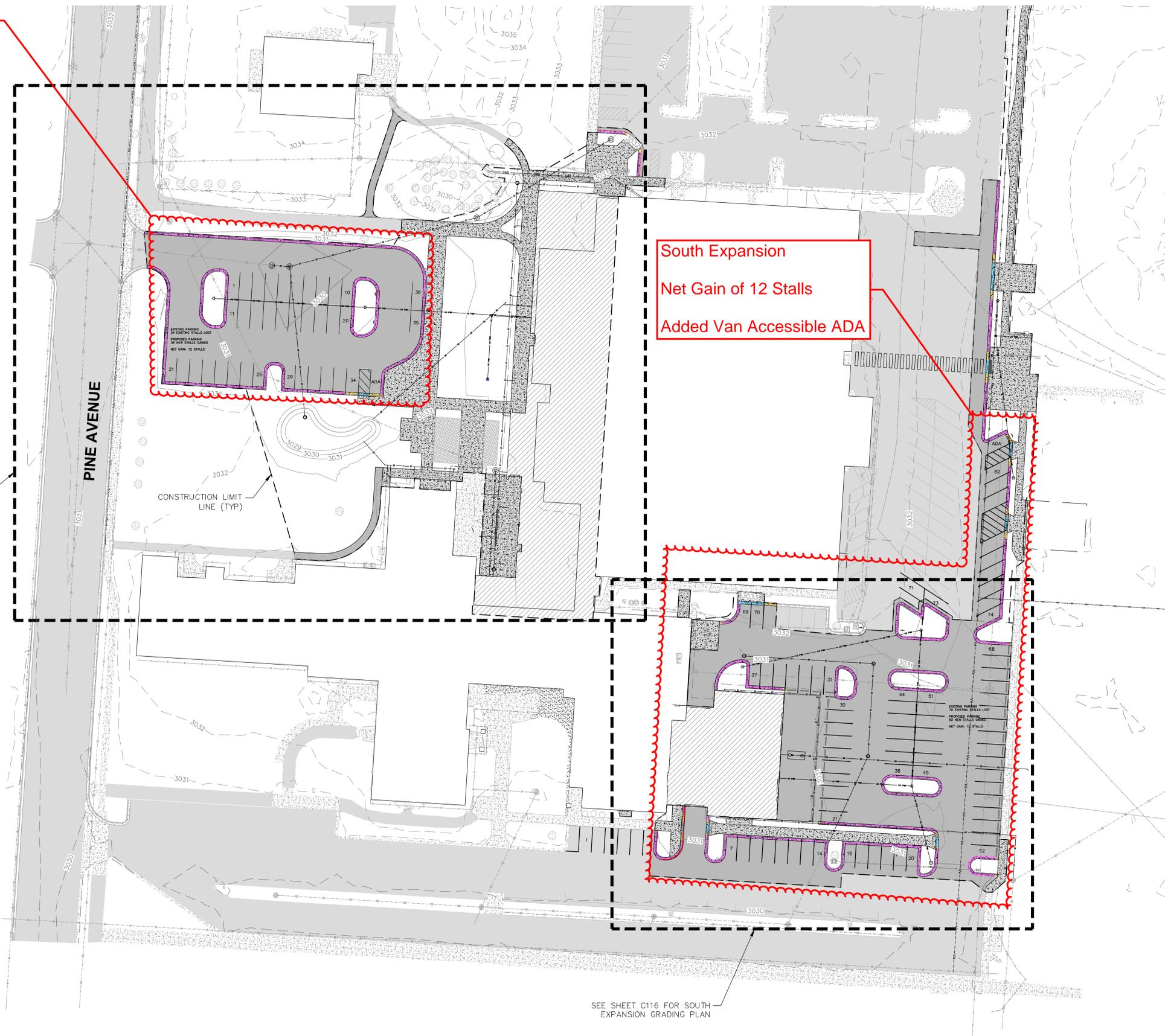
GENERAL NOTES:

1. XXX

North Expansion
Net Gain of 12 Stalls
Upgraded ADA to Van Accessible

SHADING LEGEND:

-  EXISTING ASPHALT TO REMAIN
-  PROPOSED ASPHALT
-  EXISTING CONCRETE TO REMAIN
-  PROPOSED CONCRETE
-  BUILDING EXPANSION AREA
-  PROPOSED FULL HEIGHT CURB
-  PROPOSED TRANSITION CURB
-  PROPOSED ADA LAYDOWN CURB
-  PROPOSED DRIVE-OVER CURB



SEE SHEET C115 FOR NORTH EXPANSION GRADING PLAN

South Expansion
Net Gain of 12 Stalls
Added Van Accessible ADA

SEE SHEET C116 FOR SOUTH EXPANSION GRADING PLAN



sheet GRADING OVERVIEW PLAN
project WHITEFISH HIGH SCHOOL
owner WHITEFISH SCHOOL DISTRICT

project # 24-19
revision date

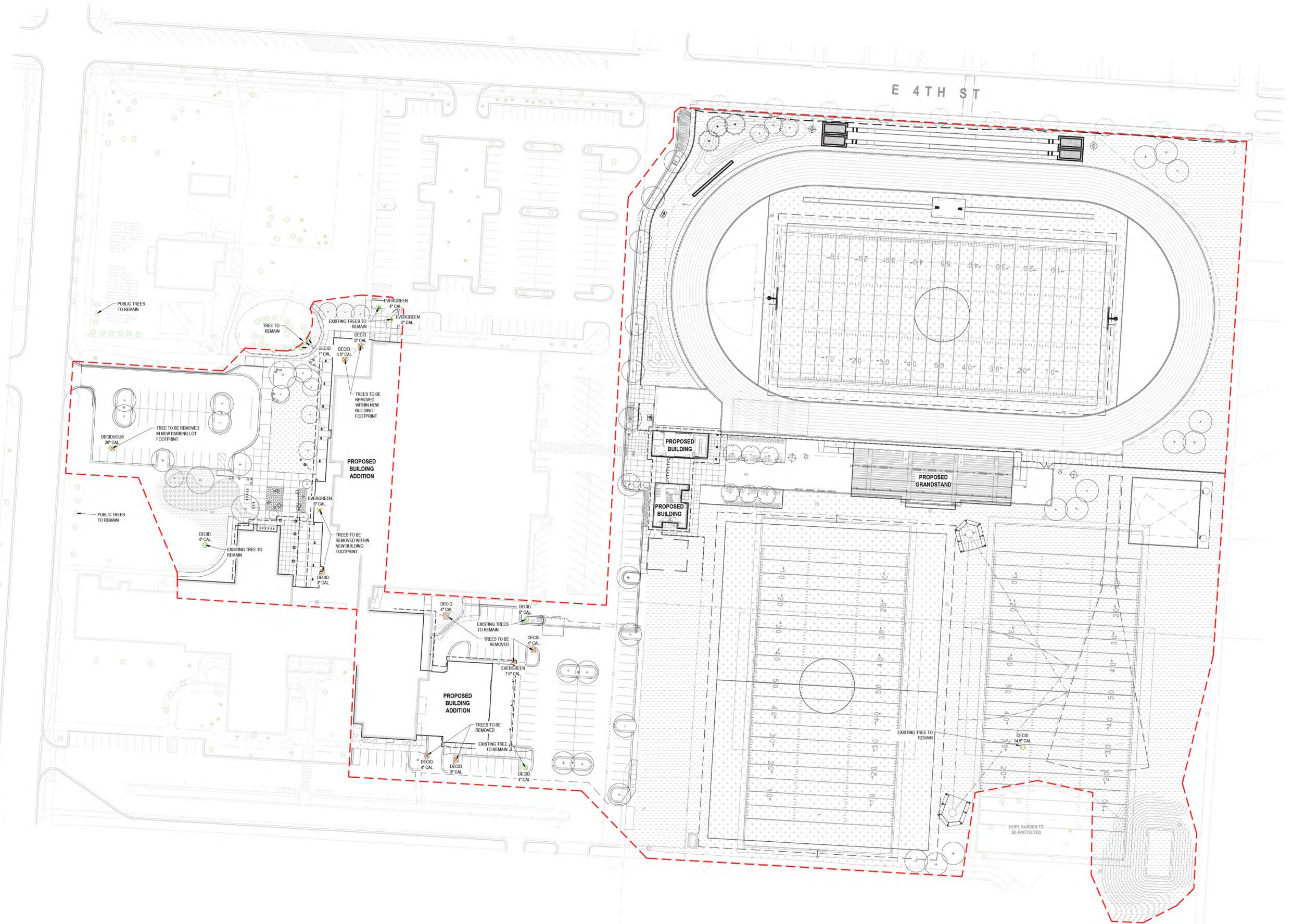
Phase 1 - Academics
NOT FOR CONSTRUCTION

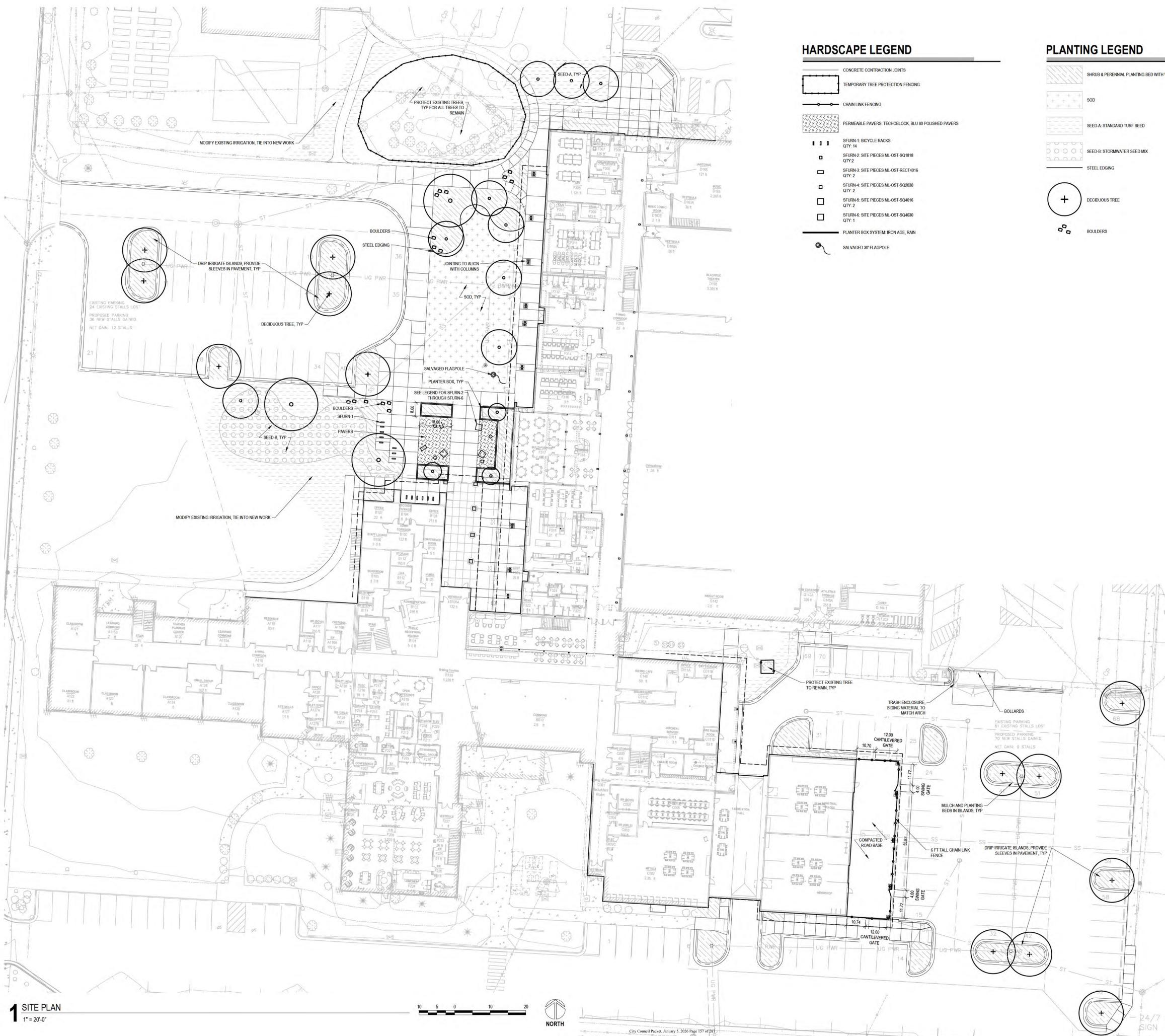


SCALE IN FEET - HORIZONTAL
30 0 30 60 90

issue date
11.26.25
C114

1 TREE EXHIBIT
1" = 40'-0"





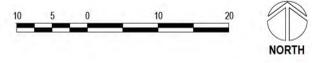
HARDSCAPE LEGEND

- CONCRETE CONTRACTION JOINTS
- TEMPORARY TREE PROTECTION FENCING
- CHAIN LINK FENCING
- PERMEABLE PAVERS: TECHBLOCK, BLU 80 POLISHED PAVERS
- SFURN-1 BICYCLE RACKS QTY: 14
- SFURN-2 SITE PIECES ML-OST-SQ1818 QTY: 2
- SFURN-3 SITE PIECES ML-OST-RECT4016 QTY: 2
- SFURN-4 SITE PIECES ML-OST-SQ2030 QTY: 2
- SFURN-5 SITE PIECES ML-OST-SQ4916 QTY: 2
- SFURN-6 SITE PIECES ML-OST-SQ4030 QTY: 1
- PLANTER BOX SYSTEM: IRON AGE, RAIN
- SALVAGED 3/4 FLAGPOLE

PLANTING LEGEND

- SHRUB & PERENNIAL PLANTING BED WITH WOOD MULCH
- SOD
- SEED-A: STANDARD TURF SEED
- SEED-B: STORMWATER SEED MIX
- STEEL EDGING
- DECIDUOUS TREE
- BOULDERS

1 SITE PLAN
1" = 20'-0"



sheet **SITE PLAN**
 project **WITEFISH HIGH SCHOOL - ACADEMICS**
 owner **WHITEFISH HIGH SCHOOL**

project # **24196**
 revision _____ date _____

phase **NOT FOR CONSTRUCTION**



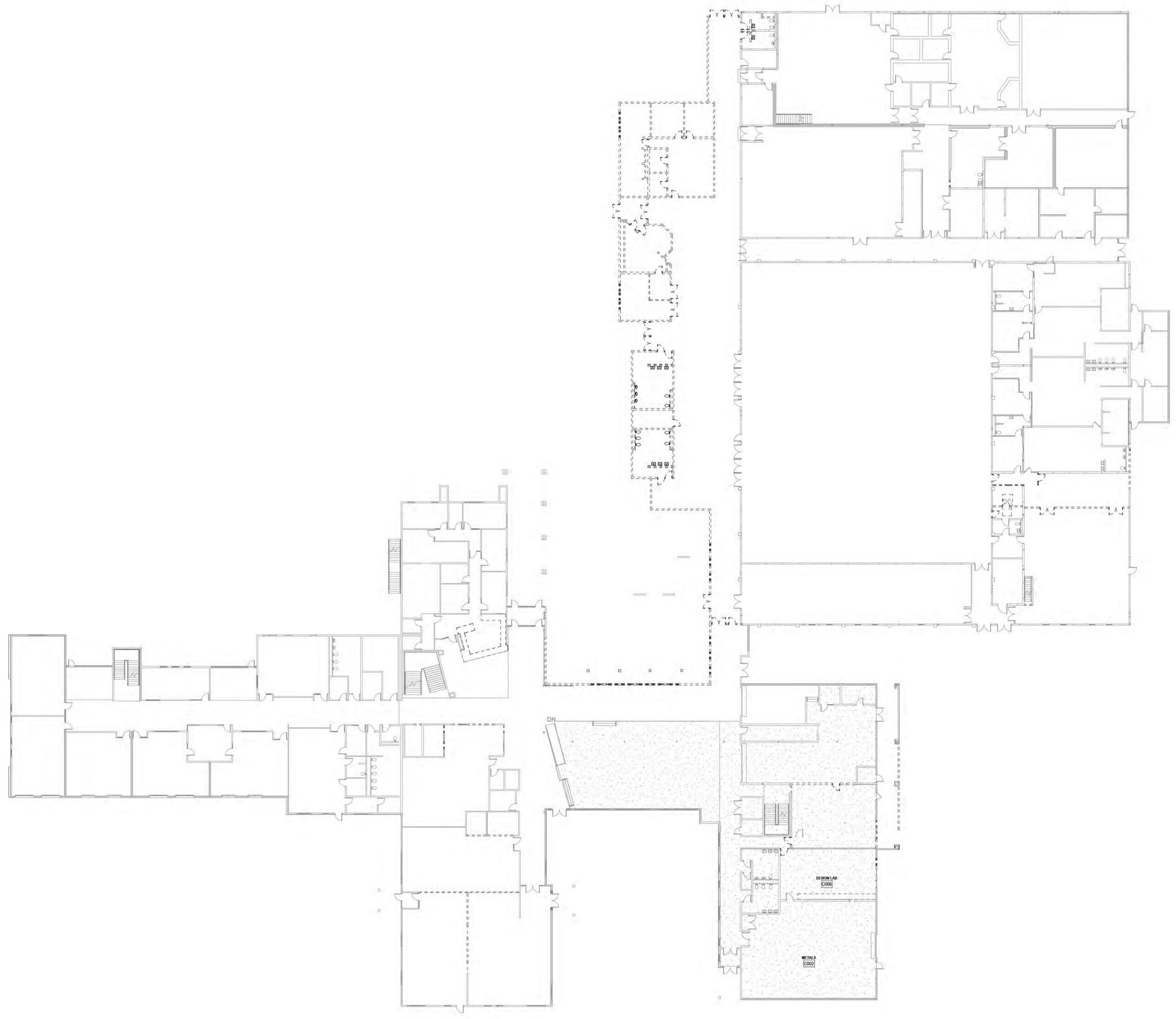
issue date **09-05-2025**

L1.1

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City Council Packet, January 5, 2026 Page 157 of 281

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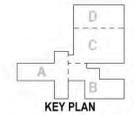
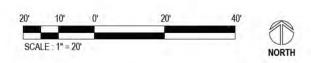
sheet ARC - DEMO FIRST LEVEL FLOOR PLAN
project WHITEFISH HIGH SCHOOL
owner

project # 24196.00
revision date

phase
50% CONSTRUCTION DOCUMENTS
NOT FOR CONSTRUCTION

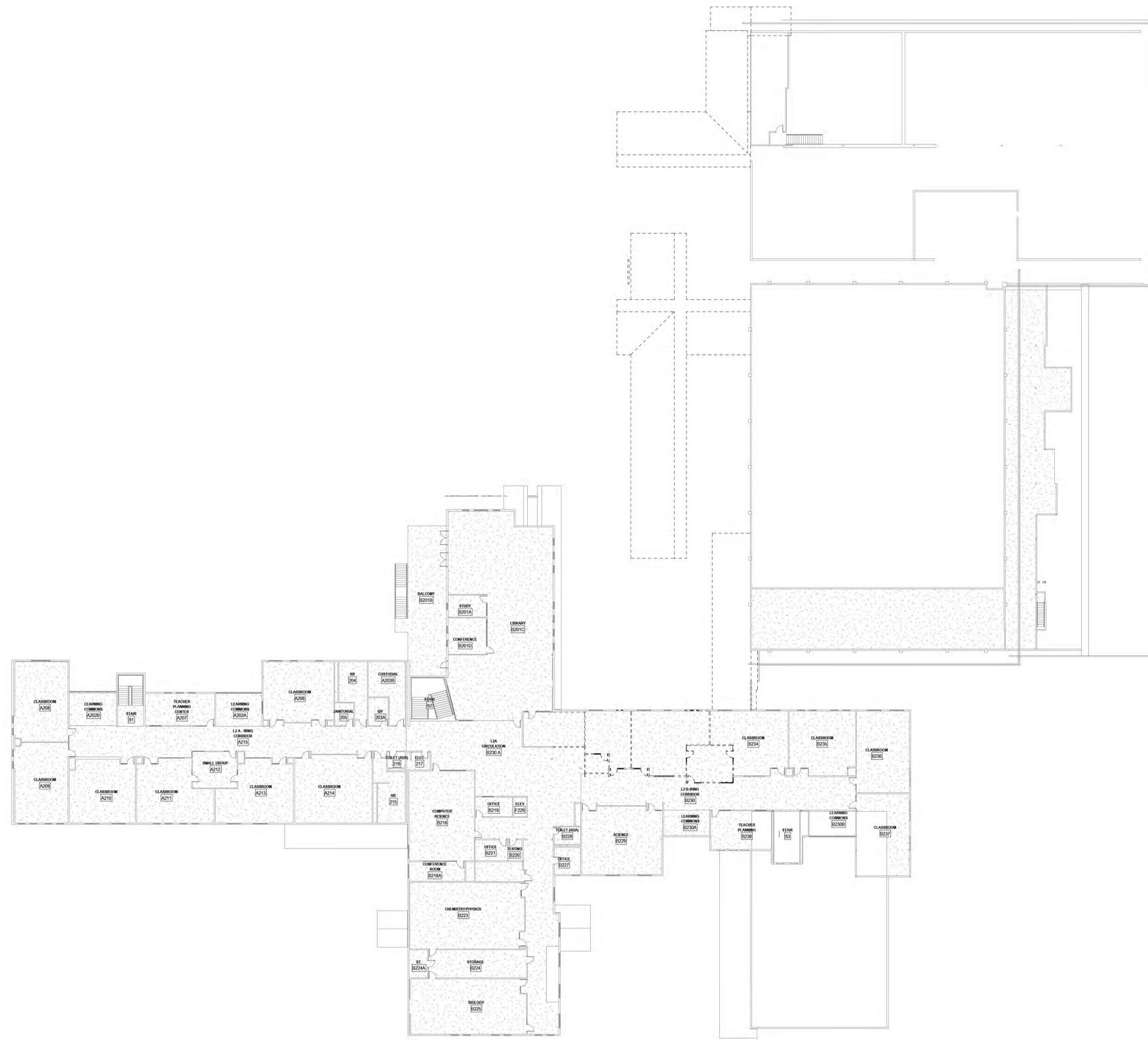


1 ARC - LEVEL 1 DEMOLITION PLAN
1" = 20'-0"



issue date
Nov 26, 2025
ARC AD1.1

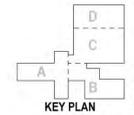
FOR REFERENCE ONLY FOR REFERENCE ONLY FOR CONSTRUCTION



sheet ARC - DEMO SECOND LEVEL FLOOR PLAN
project WHITEFISH HIGH SCHOOL
owner

project # 24196.00
revision date

phase
50% CONSTRUCTION DOCUMENTS
NOT FOR CONSTRUCTION



issue date
Nov 26, 2025
ARC AD1.2

FOR REFERENCE ONLY FOR CONSTRUCTION

BUILDING 3 SUMMARY

CONSTRUCTION TYPE: IIB
 OCCUPANCY GROUP: E (EDUCATIONAL)
 PERIMETER = 915' - 6"
 PERIMETER w/ 30' OPEN SPACE = 574' - 9"
 = 62.78% = 574.75' x 515.5'
 ALLOWABLE AREA = 50,750 SF (EA STORY)
 $A_s = A_i + (NS \times H) = 43,500 \text{ SF} + (14,500 \times 50)$
 ACTUAL AREA LEVEL 1 = 46,813 SF

BUILDING 4 SUMMARY

CONSTRUCTION TYPE: VB
 OCCUPANCY GROUP: E (EDUCATIONAL)
 PERIMETER = 693' - 9"
 PERIMETER w/ 30' OPEN SPACE = 289' - 3"
 = 38.82% = 289.25' x 693.75'
 ALLOWABLE AREA = 30,875 SF (EA STORY)
 $A_s = A_i + (NS \times H) = 28,500 \text{ SF} + (9,500 \times 25)$
 ACTUAL AREA LEVEL 1 = 17,670 SF

BUILDING 5 SUMMARY

CONSTRUCTION TYPE: VB
 OCCUPANCY GROUP: E (EDUCATIONAL)
 PERIMETER = 324' - 6"
 PERIMETER w/ 30' OPEN SPACE = 235' - 6"
 = 72.97% = 235.9' x 324.9'
 ALLOWABLE AREA = 33,250 SF (EA STORY)
 $A_s = A_i + (NS \times H) = 28,500 \text{ SF} + (9,500 \times 50)$
 ACTUAL AREA LEVEL 1 = 6,483 SF

BUILDING 1 SUMMARY

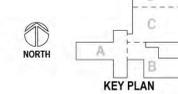
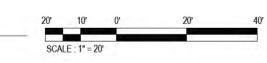
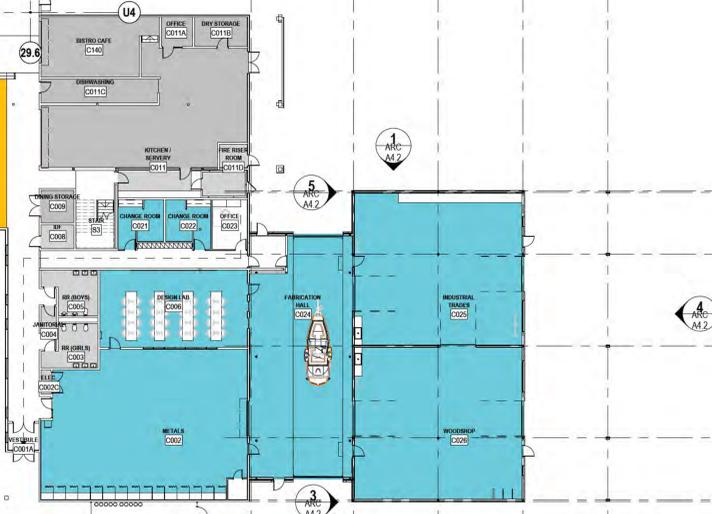
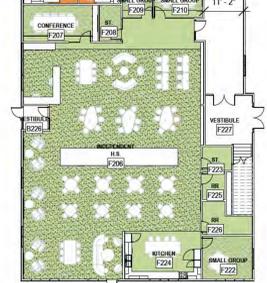
CONSTRUCTION TYPE: VB
 OCCUPANCY GROUP: E (EDUCATIONAL)
 PERIMETER = 498' - 9"
 PERIMETER w/ 30' OPEN SPACE = 437' - 9"
 = 87.77% = 437.75' x 498.75'
 ALLOWABLE AREA = 35,625 SF (EA STORY)
 $A_s = A_i + (NS \times H) = 28,500 \text{ SF} + (9,500 \times 75)$
 ACTUAL AREA LEVEL 1 = 11,579 SF

BUILDING 2 SUMMARY

CONSTRUCTION TYPE: VB
 OCCUPANCY GROUP: E (EDUCATIONAL)
 PERIMETER = 1,160' - 0"
 PERIMETER w/ 25' OPEN SPACE = 903' - 3"
 = 77.87% = 903.25' x 1,160.0'
 ALLOWABLE AREA = 34,485 SF (EA STORY)
 $A_s = A_i + (NS \times H) = 28,500 \text{ SF} + (9,500 \times 63)$
 ACTUAL AREA LEVEL 1 = 34,169 SF

- Schema 1 Legend
- ADMIN
 - BUILDING SERVICES
 - CLASSROOM
 - COMMONS
 - CORRIDOR
 - DESIGN & CONSTRUCTION
 - ELECTIVES
 - ENTREPRENEURSHIP
 - FLEX / SHARED
 - HOSPITALITY
 - KITCHEN
 - PHYSICAL EDUCATION / ATHLETICS
 - SPECIAL EDUCATION
 - STUDENT SERVICES

- L4
- L4.5
- M4
- M4.5
- N4.3
- N4.7
- P4.5



sheet FIRST LEVEL FLOOR PLAN
 project WHITEFISH HIGH SCHOOL
 owner

project # 24196.00
 revision date

phase
 50% CONSTRUCTION DOCUMENTS
 NOT FOR CONSTRUCTION



issue date
 Nov 26, 2025
ARC A2.1

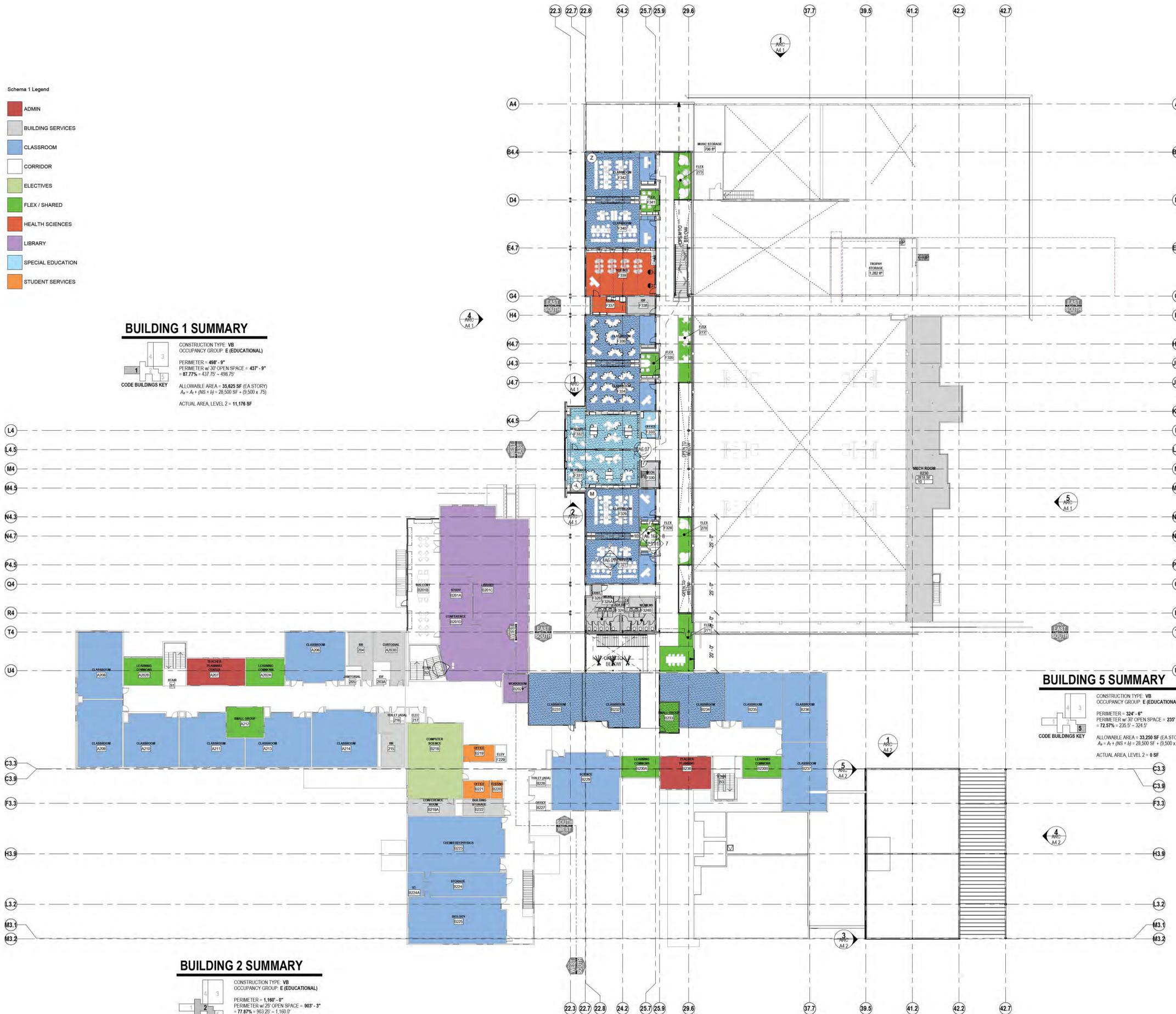
- Schema 1 Legend
- ADMIN
 - BUILDING SERVICES
 - CLASSROOM
 - CORRIDOR
 - ELECTIVES
 - FLEX / SHARED
 - HEALTH SCIENCES
 - LIBRARY
 - SPECIAL EDUCATION
 - STUDENT SERVICES

BUILDING 1 SUMMARY

CONSTRUCTION TYPE: VB
OCCUPANCY GROUP: E (EDUCATIONAL)
PERIMETER = 488'-9"
PERIMETER w/ 30' OPEN SPACE = 437'-9"
= 81,776 = 437.75' x 186.75'
ALLOWABLE AREA = 35,625 SF (EA STORY)
 $A_s = A_r \times (NS \times H) = 28,500 \text{ SF} = (9,500 \times 3)$
ACTUAL AREA, LEVEL 2 = 11,176 SF

CODE BUILDINGS KEY

- L4
- L4.5
- M4
- M4.5
- M4.3
- M4.7
- P4.5
- Q4
- R4
- T4
- U4
- C3.3
- C3.9
- F3.3
- H3.9
- L3.2
- M3.1
- M3.2



BUILDING 2 SUMMARY

CONSTRUCTION TYPE: VB
OCCUPANCY GROUP: E (EDUCATIONAL)
PERIMETER = 1,160'-0"
PERIMETER w/ 20' OPEN SPACE = 963'-3"
= 71,876 = 963.25' x 746.25'
ALLOWABLE AREA = 34,485 SF (EA STORY)
 $A_s = A_r \times (NS \times H) = 28,500 \text{ SF} = (9,500 \times 3)$
ACTUAL AREA, LEVEL 2 = 25,821 SF

CODE BUILDINGS KEY

BUILDING 5 SUMMARY

CONSTRUCTION TYPE: VB
OCCUPANCY GROUP: E (EDUCATIONAL)
PERIMETER = 324'-6"
PERIMETER w/ 30' OPEN SPACE = 235'-6"
= 72,576 = 235.5' x 308.5'
ALLOWABLE AREA = 33,250 SF (EA STORY)
 $A_s = A_r \times (NS \times H) = 28,500 \text{ SF} = (9,500 \times 3)$
ACTUAL AREA, LEVEL 2 = 0 SF

CODE BUILDINGS KEY

sheet SECOND LEVEL FLOOR PLAN
project WHITEFISH HIGH SCHOOL
owner

project # 24196.00
revision date

phase 50% CONSTRUCTION DOCUMENTS
NOT FOR CONSTRUCTION

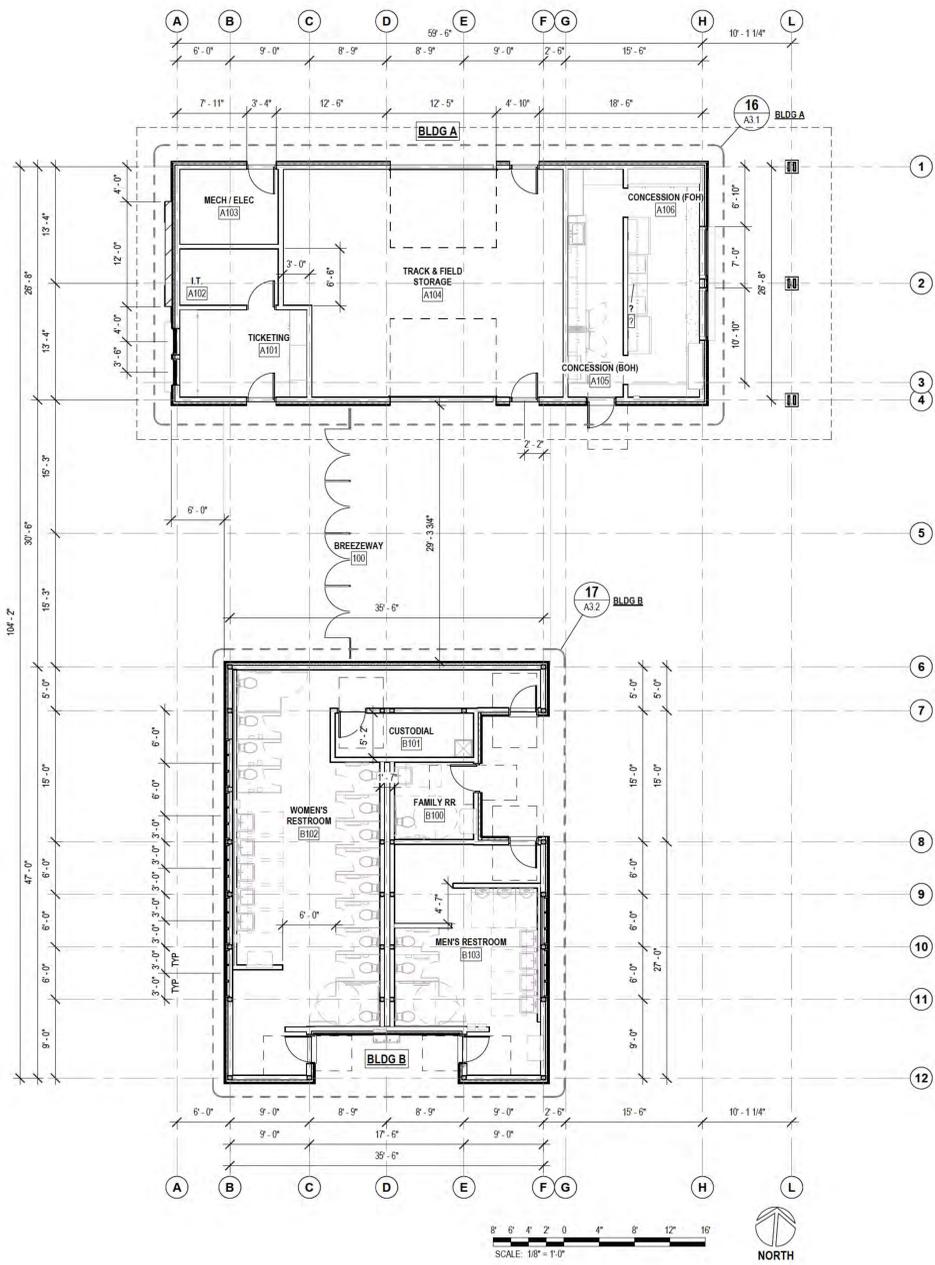


issue date Nov 26, 2025

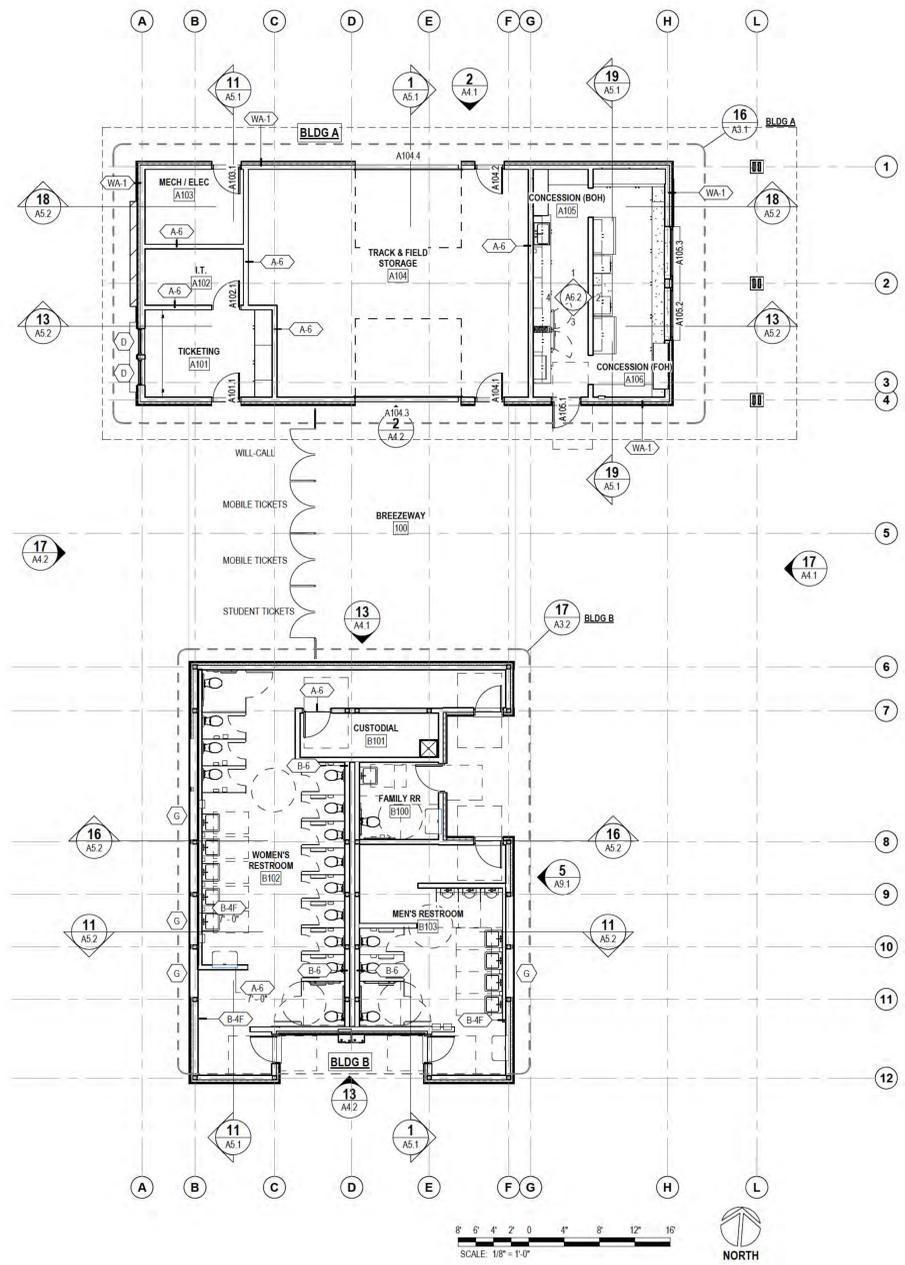
ARC A2.2

FLOOR PLAN GENERAL NOTES

1. REFER TO STRUCTURAL, MECHANICAL, AND ELECTRICAL DRAWINGS FOR ADDITIONAL INFORMATION. ALL INFORMATION REGARDING EXISTING CONDITIONS IS BASED UPON OWNER-SUPPLIED DOCUMENTS AND MAY NOT PRECISELY REFLECT FIELD CONDITIONS.
2. THE CONTRACTOR SHALL NOT CONSIDER CONSTRUCTION NOTES TO BE ALL-INCLUSIVE. IT IS THE CONTRACTOR'S RESPONSIBILITY TO INSPECT AND ASSESS EACH AREA AND TO FULFILL THE INTENT OF THE CONTRACT DOCUMENTS. CONTRACTOR SHALL CORRELATE ARCHITECTURAL, CONSTRUCTION DRAWINGS AND NOTES WITH CIVIL, STRUCTURAL AND MECHANICAL, ELECTRICAL & PLUMBING NOTES AND DRAWINGS.
3. FIELD VERIFY ALL DIMENSIONS. DO NOT SCALE DRAWINGS.
4. ALL FINISHES AND MATERIALS SHALL BE PROPERLY INTEGRATED TO ENSURE A UNIFORM APPEARANCE AND SEAMLESS TRANSITION.
5. PROVIDE ALL BACKING FOR MILLWORK, GRAB BARS, AND ANY AND ALL WALL MOUNTED EQUIPMENT OR ACCESSORIES; COORDINATE LOCATIONS.
6. ALL DIMENSIONS ARE FROM STRUCTURAL UNFINISHED FACE OF STUD. OR FROM GRID LINES, UNLESS OTHERWISE NOTED.
7. GENERAL CONTRACTOR SHALL COORDINATE ALL ASPECTS OF THE BUILDING CONSTRUCTION.
8. PROVIDE A SMOOTH AND LEVEL FINISH FLOOR, TYP. PATCH AND REPAIR ALL INCONSISTENCIES IN FLOOR ELEVATIONS.
9. PATCH AND REPAIR ANY / ALL WALL SURFACES AS REQUIRED TO PROVIDE SUITABLE SUBSTRATE FOR FINISHES.
10. U/I ASSEMBLIES DESCRIBED ARE FOR REFERENCE ONLY. THE GENERAL CONTRACTOR SHALL COORDINATE AND VERIFY THE INSTALLATION OF THE DESCRIBED SYSTEMS.
11. REFER TO DOOR AND FRAME SCHEDULE FOR DOORS REQUIRING ADA ACCESS CONTROL.
12. LOCATE THE HINGE SIDE JAMB OF DOORS 4" FROM ADJACENT PERPENDICULAR WALL, UNLESS NOTED OTHERWISE.
13. PROVIDE ACOUSTICAL SEALANT AROUND WALL EDGES, TOP AND BOTTOM, AND PENETRATIONS, AND INSTALL PUTTY PADS AROUND ELECTRICAL BOXES WHERE PARTITION CONTAINS ACOUSTICAL INSULATION.
14. REFER TO SPECIFICATIONS FOR CODE REQUIRED SIGNAGE. PROVIDE ADDITIONAL SIGNAGE AS MAY BE REQUIRED BY REQUEST OF THE FIRE MARSHAL AND/OR BUILDING CODE OFFICIAL.



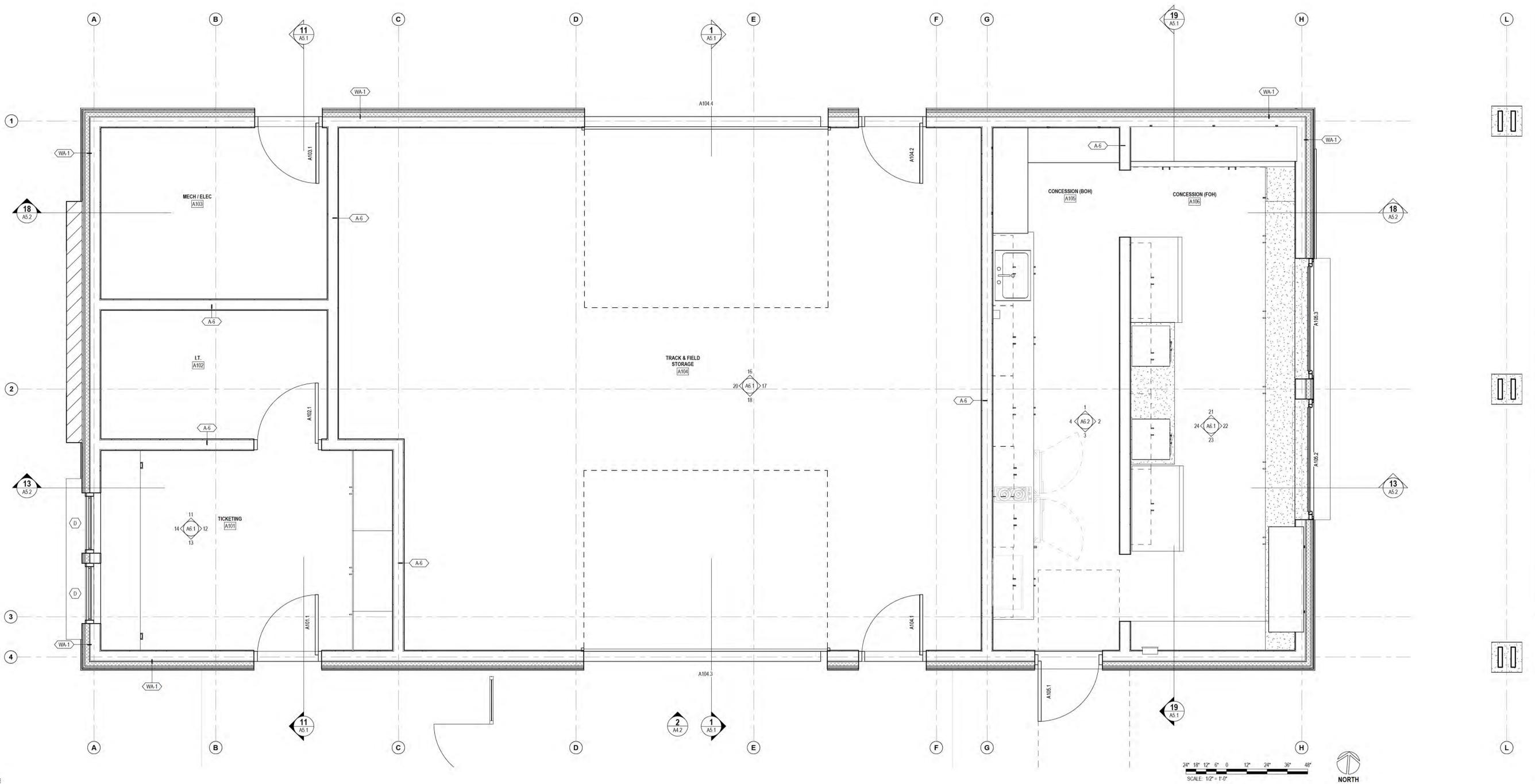
16 FIELD BUILDING - DIMENSION PLAN
1/8" = 1'-0"



18 FIELD BUILDING - FLOOR PLAN
1/8" = 1'-0"



NOT FOR CONSTRUCTION



sheet ENLARGED PLAN - BUILDING A
project WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS
owner WHITEFISH HIGH SCHOOL

project # 24196.10

No. Description Date

phase
100% DESIGN
DEVELOPMENT
NOT FOR CONSTRUCTION



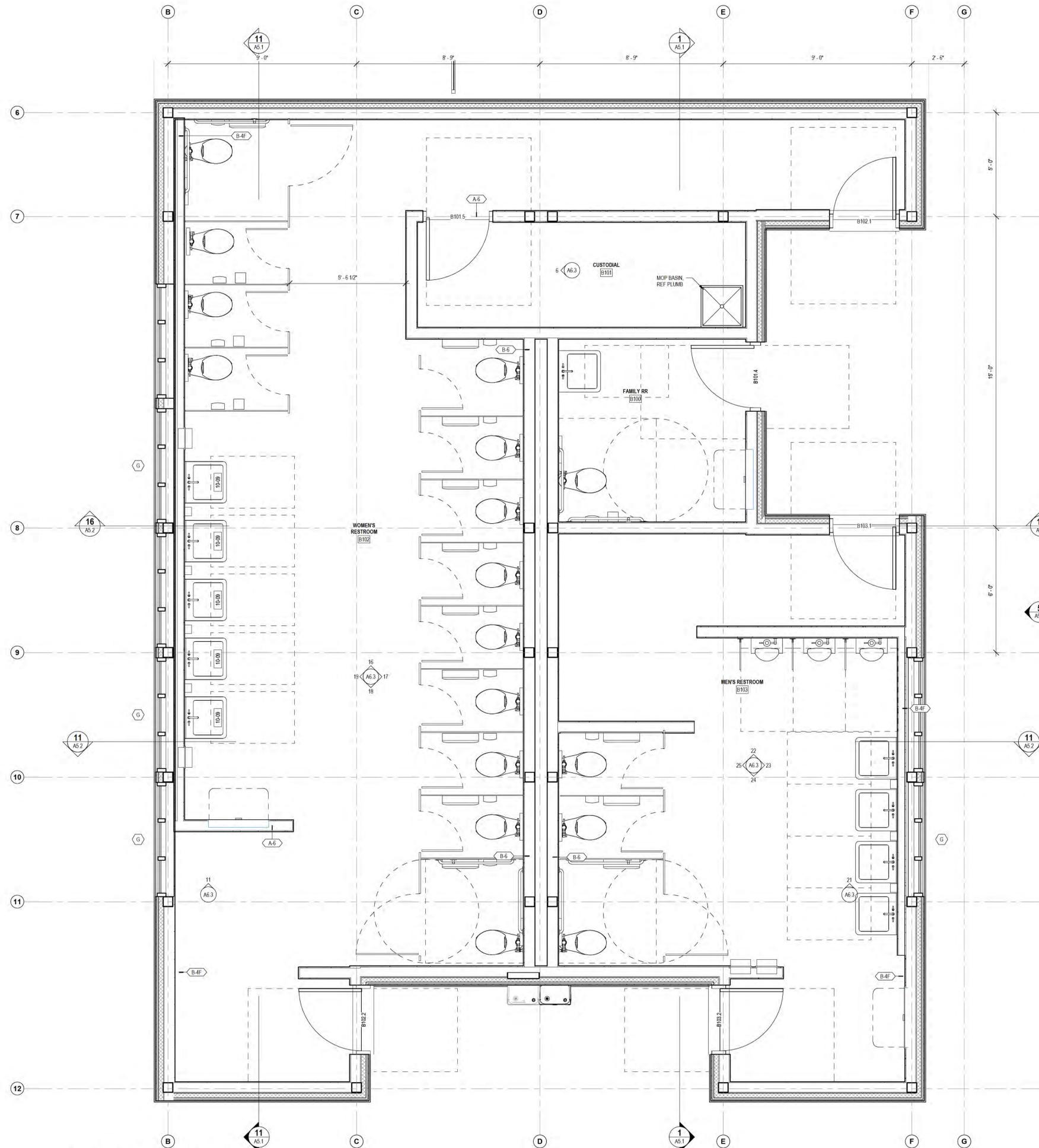
issue date
OCT 22, 2025

A3.1

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16 ENLARGED FLOOR PLAN - TICKET & STORAGE BUILDING
1/2" = 1'-0"

10/20/2025 12:03:01 PM



17 ENLARGED FLOOR PLAN - RESTROOMS
1/2" = 1'-0"

City Council Packet, January 5, 2026 Page 166 of 287

KEYNOTES

10-09

NOT FOR CONSTRUCTION

sheet **ENLARGED PLAN - BUILDING B**
 project **WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS**
 owner **WHITEFISH HIGH SCHOOL**

project # **24196.10**

No. Description Date

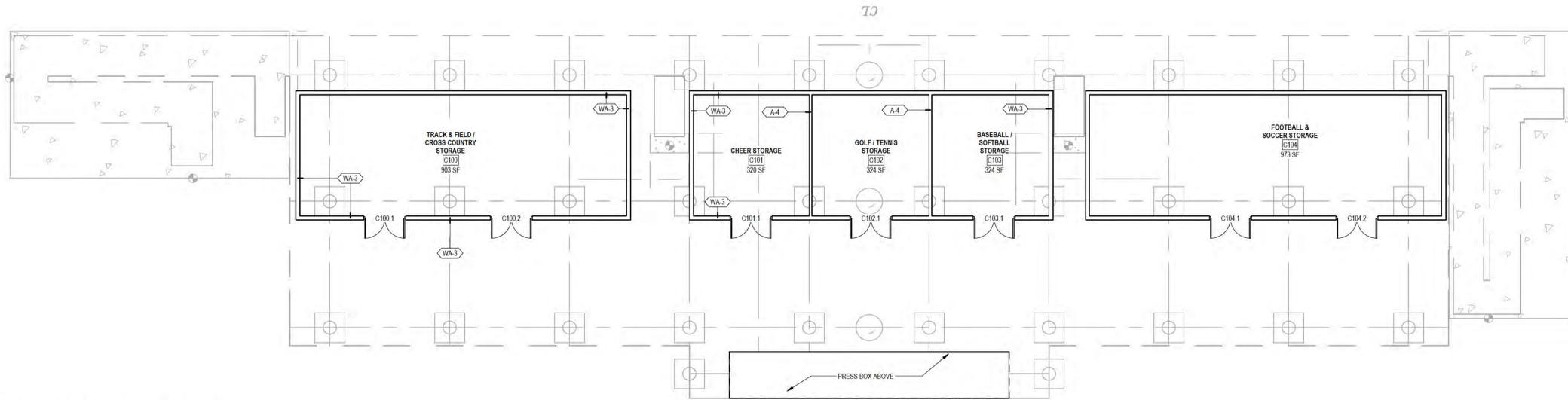
phase
100% DESIGN DEVELOPMENT
 NOT FOR CONSTRUCTION



issue date
OCT 22, 2025

A3.2

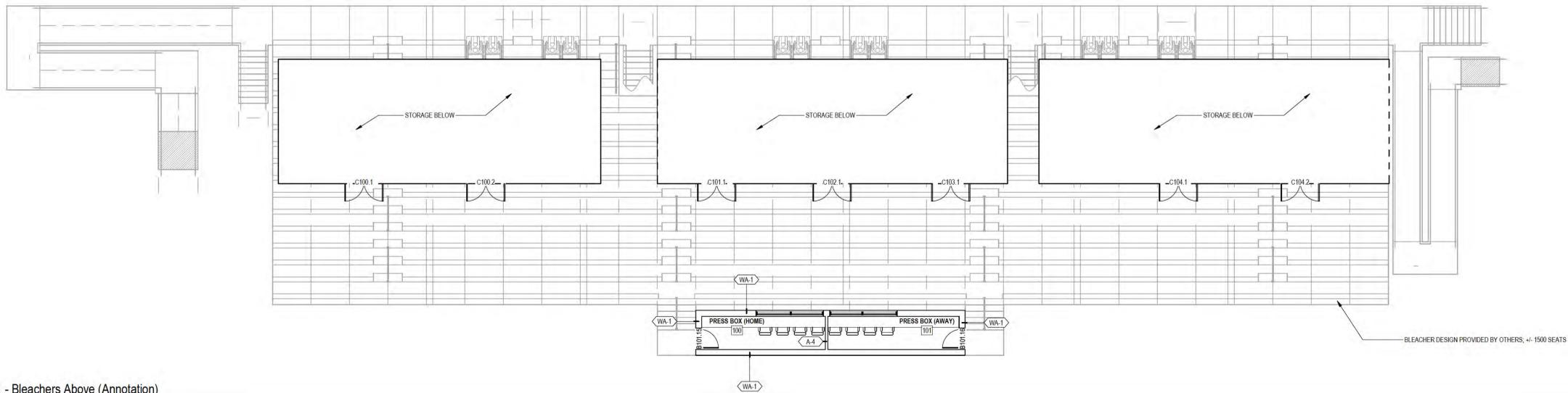
JOB REFERENCE ONLY FOR CONSTRUCTION



1 Level 1 - Bleachers Below (Annotation)
1/8" = 1'-0"

FLOOR PLAN GENERAL NOTES

1. REFER TO STRUCTURAL, MECHANICAL, AND ELECTRICAL DRAWINGS FOR ADDITIONAL INFORMATION. ALL INFORMATION REGARDING EXISTING CONDITIONS IS BASED UPON OWNER-SUPPLIED DOCUMENTS AND MAY NOT PRECISELY REFLECT FIELD CONDITIONS.
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2 Level 1 - Bleachers Above (Annotation)
1/8" = 1'-0"

sheet ENLARGED PLAN - BLEACHERS
project WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS
owner WHITEFISH HIGH SCHOOL

project # 24196.10

No. Description Date

phase
100% DESIGN DEVELOPMENT
NOT FOR CONSTRUCTION



issue date
OCT 22, 2025

A3.4

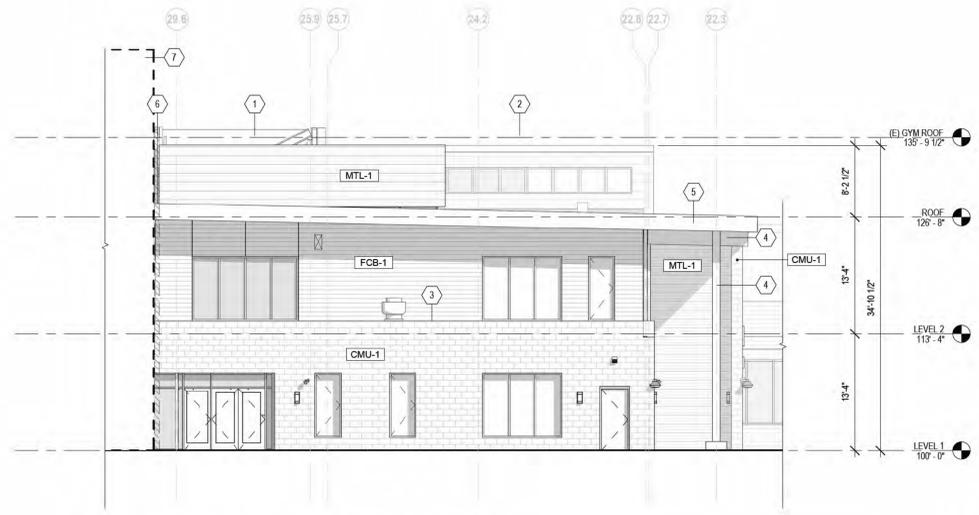
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FOR REFERENCE ONLY FOR CONSTRUCTION

MATERIAL LEGEND

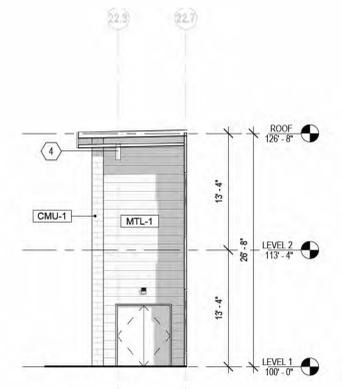
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-  CMU-1 EXPOSED CMU WITH CLEAR SEALER
-  MTL-1 METAL PANEL SIDING

KEYNOTES

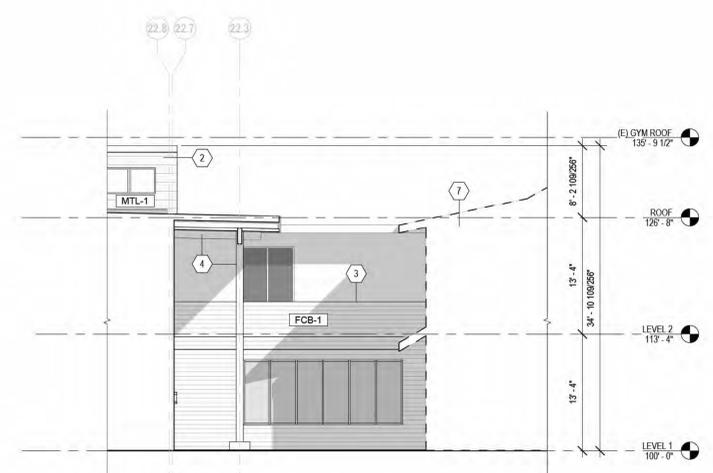
- | | |
|---|-------------------------------------|
| 1 | MECHANICAL EQUIPMENT SCREENING |
| 2 | ROOF MONITOR/LIGHT WELL |
| 3 | PARAPET CAP - COLOR TO MATCH SIDING |
| 4 | EXPOSED GLULAM STRUCTURE |
| 5 | FASCIA TO MATCH METAL PANELING |
| 6 | STRUCTURAL SEISMIC JOINT |
| 7 | EXISTING BUILDING |
| 8 | BUILDING SIGNAGE |
| 9 | STORAGE SCREENING |



1 ARC - BUILDING 4 (NEW F-WING) NORTH ELEVATION
1/8" = 1'-0"



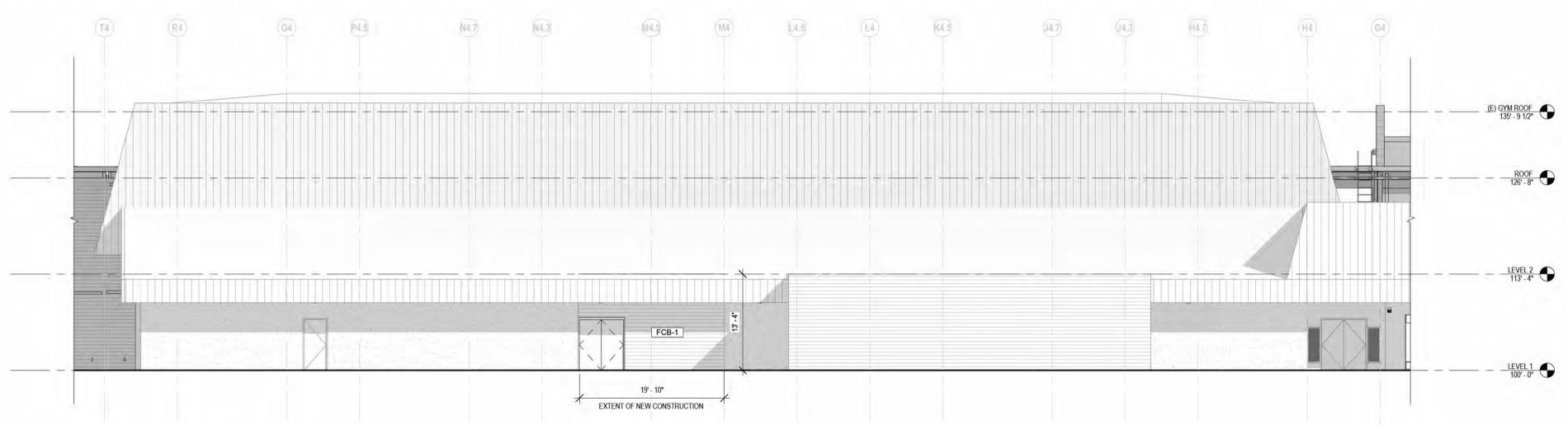
2 ARC - BUILDING 4 (NEW F WING) SOUTH ELEVATION - ENTRY
1/8" = 1'-0"



3 ARC - BUILDING 4 (NEW F-WING) NORTH ELEVATION - ENTRY
1/8" = 1'-0"



4 ARC - BUILDING 4 (NEW F-WING) WEST ELEVATION
1/8" = 1'-0"



5 ARC - GYM EAST ELEVATION
1/8" = 1'-0"

sheet
project
owner
WHITEFISH HIGH SCHOOL

project # **24196.00**
revision date

phase
50% CONSTRUCTION DOCUMENTS
NOT FOR CONSTRUCTION



issue date
Nov 26, 2025

ARC A4.1

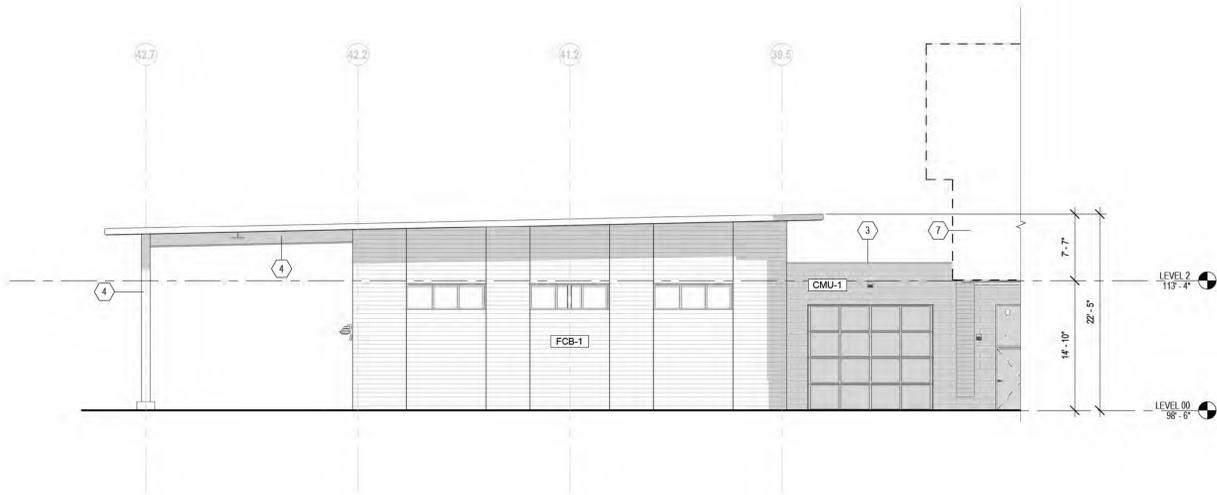
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MATERIAL LEGEND

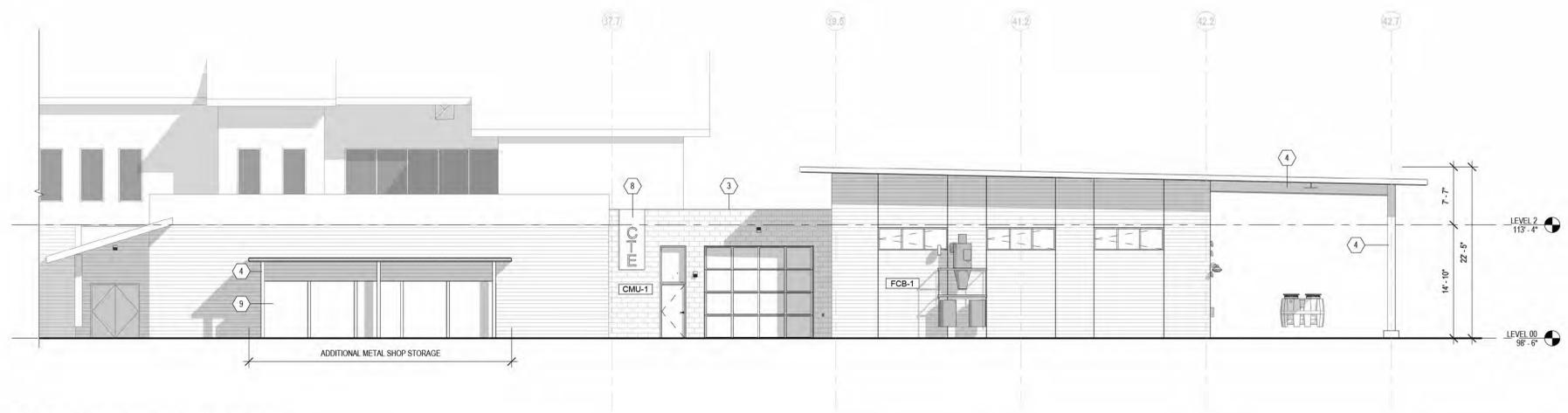
- FSB-1 FIBER CEMENT BOARD
- CMU-1 EXPOSED CMU WITH CLEAR SEALER
- MTL-1 METAL PANEL SIDING

KEYNOTES

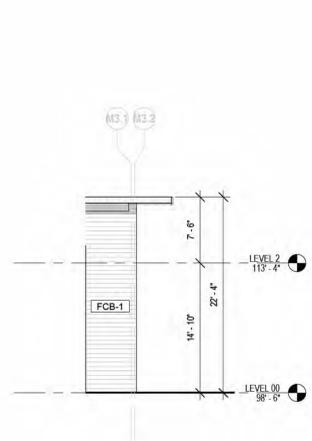
- | | |
|---|-------------------------------------|
| 1 | MECHANICAL EQUIPMENT SCREENING |
| 2 | ROOF MONITORLIGHT WELL |
| 3 | PARAPET CAP - COLOR TO MATCH SIDING |
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| 6 | STRUCTURAL SEISMIC JOINT |
| 7 | EXISTING BUILDING |
| 8 | BUILDING SIGNAGE |
| 9 | STORAGE SCREENING |



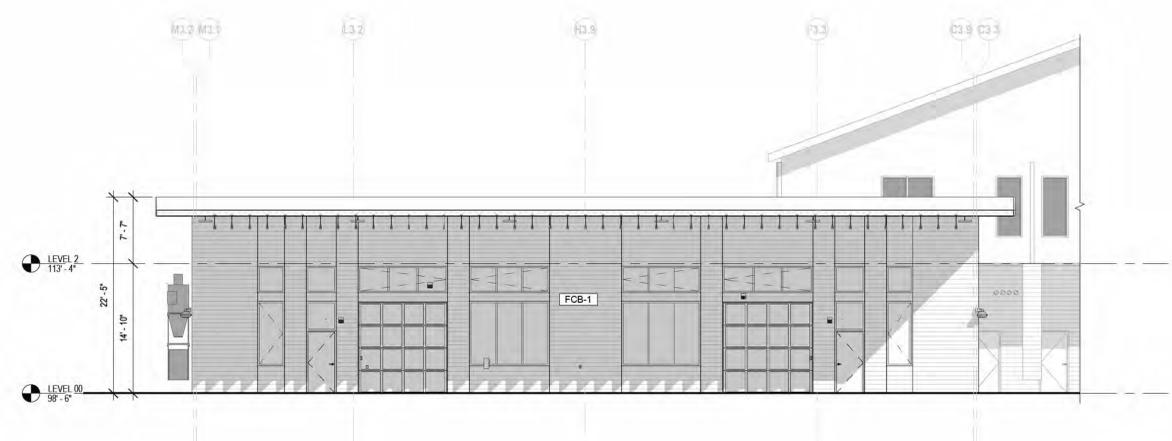
1 ARC - BUILDING 5 (NEW CTE) NORTH ELEVATION
1/8" = 1'-0"



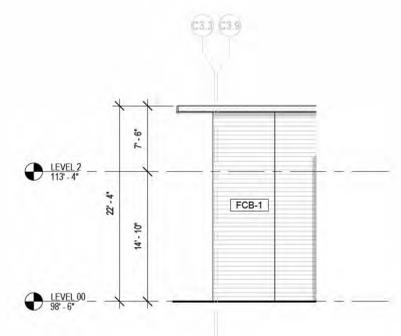
2 ARC - BUILDING 5 (NEW CTE) SOUTH ELEVATION
1/8" = 1'-0"



3 ARC - BUILDING 5 (NEW CTE) WEST ELEVATION
1/8" = 1'-0"



4 ARC - BUILDING 5 (NEW CTE) EAST ELEVATION
1/8" = 1'-0"



5 ARC - BUILDING 5 (NEW CTE) WEST ELEVATION 2
1/8" = 1'-0"

sheet
 project
 owner
 EXTERIOR ELEVATIONS CTE
 WHITEFISH HIGH SCHOOL

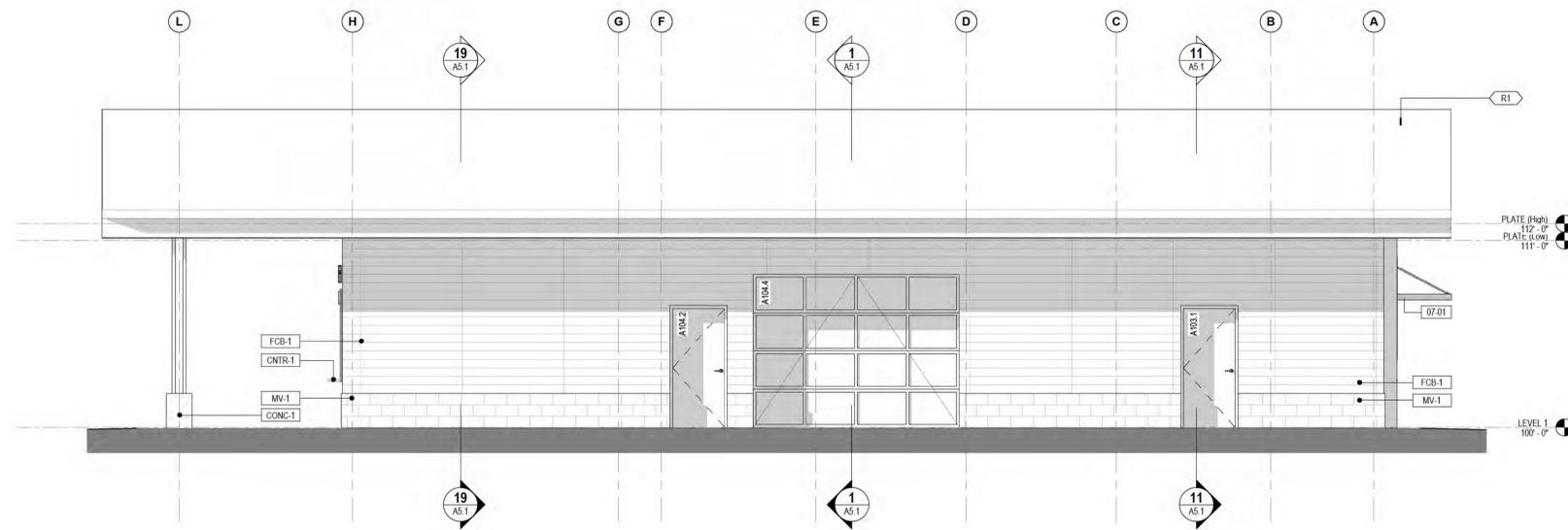
project # 24196.00
revision date

phase
50% CONSTRUCTION DOCUMENTS
NOT FOR CONSTRUCTION

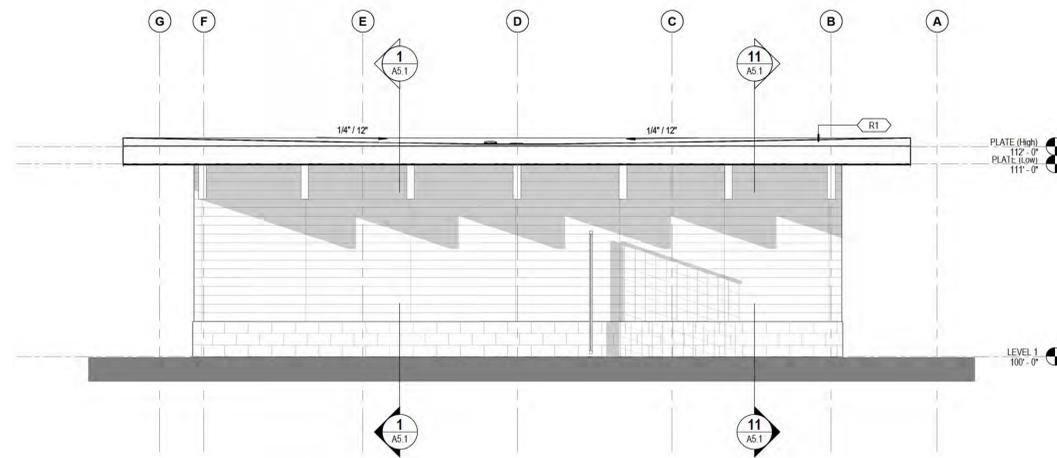


issue date
Nov 26, 2025

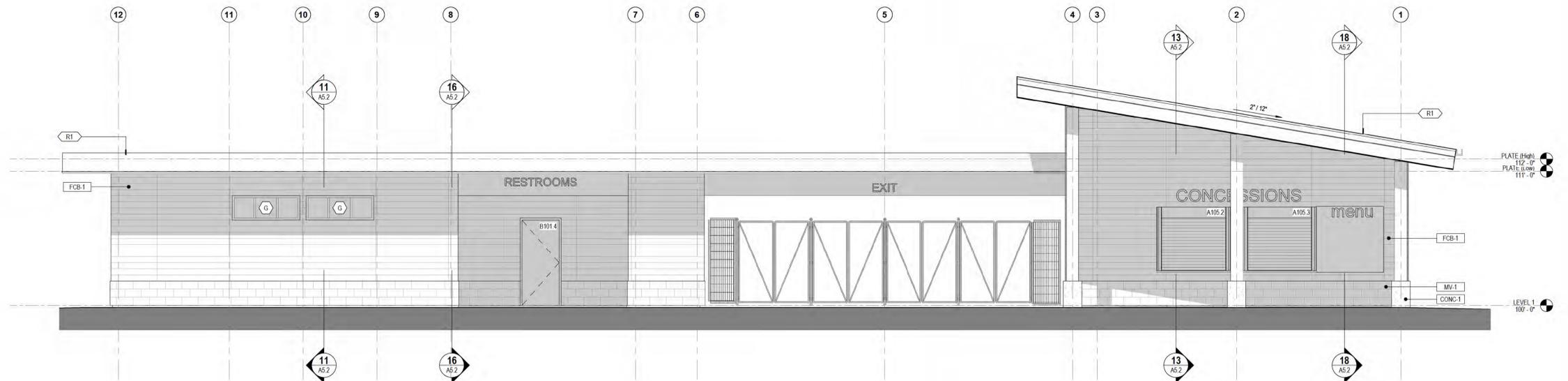
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2 EXTERIOR ELEVATION NORTH
1/4" = 1'-0"



13 EXTERIOR ELEVATION, BLDG B - NORTH
1/4" = 1'-0"



17 EXTERIOR ELEVATION - EAST
1/4" = 1'-0"

KEYNOTES

07-01 CANOPY BELOW

MATERIAL TAG LEGEND

-  CONC-1 EXPOSED CONCRETE WITH CLEAR SEALER
-  FCB-1 NISHIHA METAL ALUMINUM SIDING
-  MV-1 THIN MASONRY VENEER
-  SOF-1 T&G SOFFIT

FOR REFERENCE ONLY NOT FOR CONSTRUCTION

sheet EXTERIOR ELEVATIONS
 project WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS
 owner WHITEFISH HIGH SCHOOL

project # 24196.10

No. Description Date

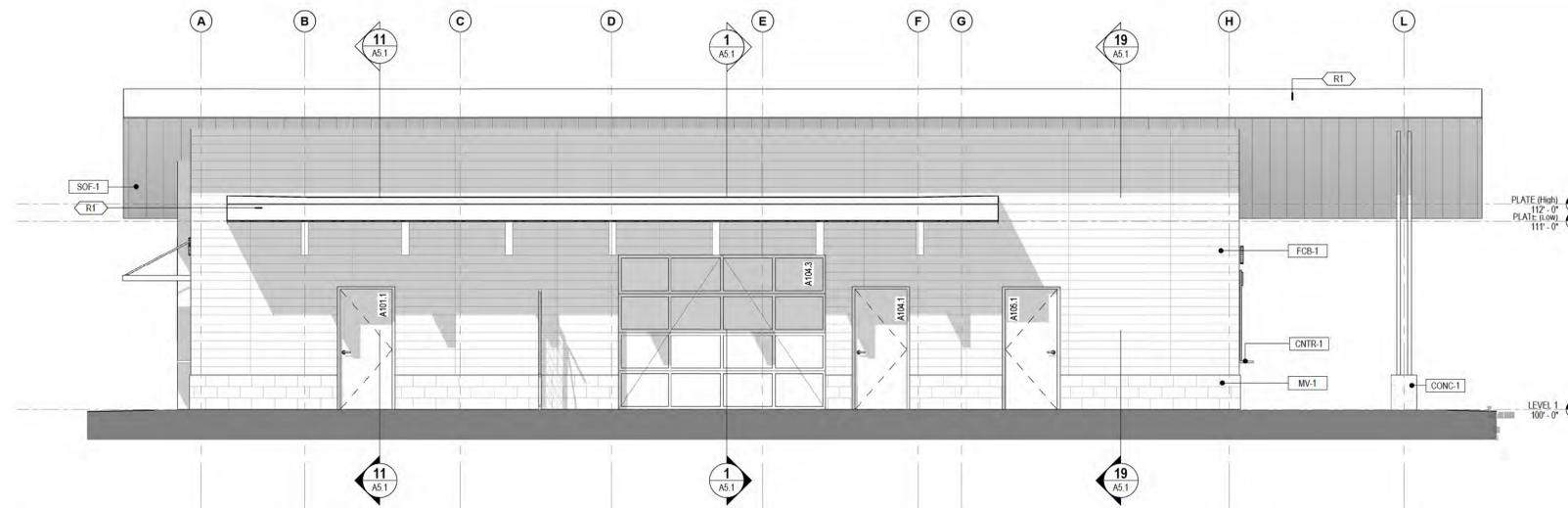
phase
100% DESIGN DEVELOPMENT
NOT FOR CONSTRUCTION



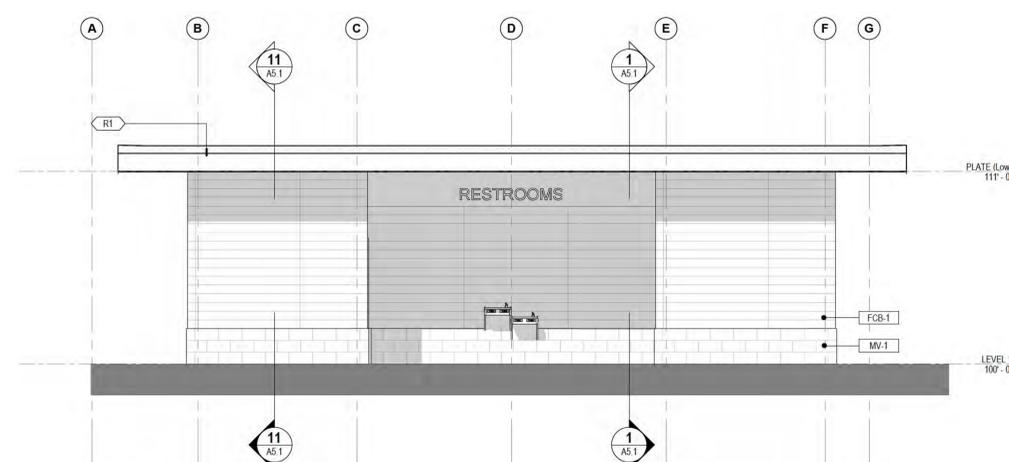
issue date
OCT 22, 2025

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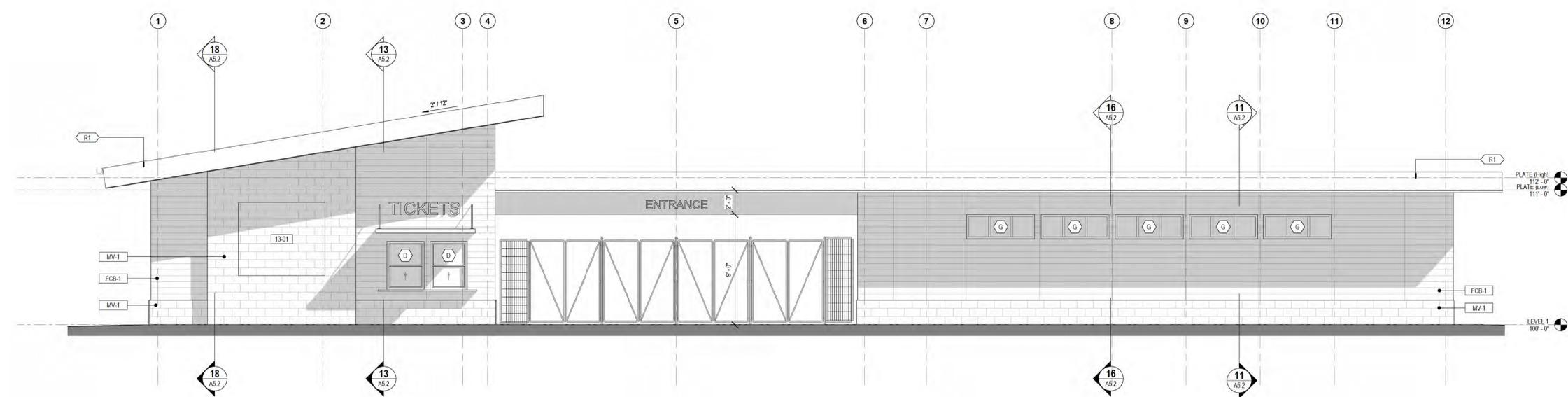
10/20/2025 12:03:13 PM



2 EXTERIOR ELEVATION SOUTH - BUILDING A
1/4" = 1'-0"



13 EXTERIOR ELEVATION, BLDG B - SOUTH
1/4" = 1'-0"



17 EXTERIOR ELEVATION - WEST
1/4" = 1'-0"

KEYNOTES

13-01

MATERIAL TAG LEGEND

-  EXPOSED CONCRETE WITH CLEAR SEALER
-  NISHIHA METAL ALUMINUM SIDING
-  THIN MASONRY VENEER
-  T&G SOFFIT

FOR REFERENCE ONLY - NOT FOR CONSTRUCTION

sheet EXTERIOR ELEVATIONS
 project WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS
 owner WHITEFISH HIGH SCHOOL

project # 24196.10

No. Description Date

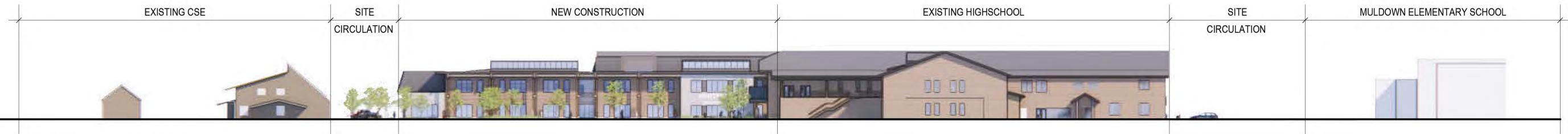
phase
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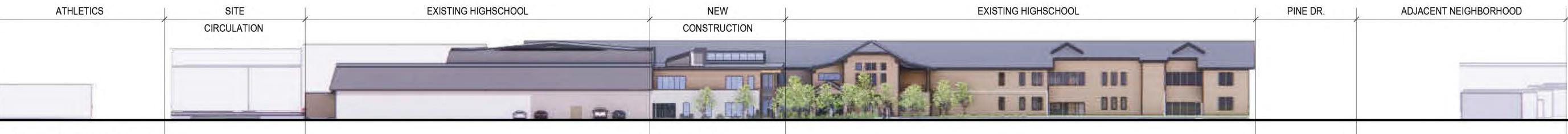
issue date
OCT 22, 2025

A4.2

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SITE SECTION - LOOKING WEST



SITE SECTION - LOOKING NORTH



SITE SECTION - LOOKING SOUTH



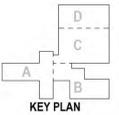
SITE SECTION - LOOKING EAST

WHITEFISH HIGH SCHOOL

sheet
project
owner

project # 24196.00
revision date

phase
50% CONSTRUCTION DOCUMENTS
NOT FOR CONSTRUCTION



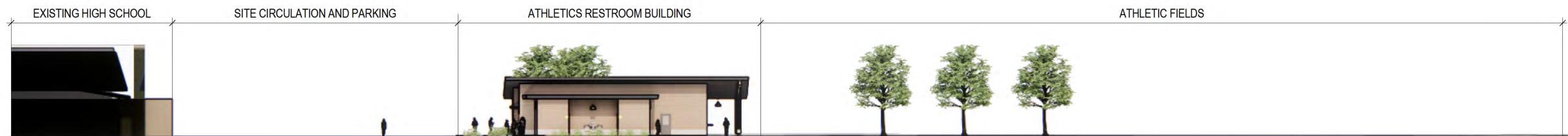
issue date
Nov 26, 2025

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NOT FOR CONSTRUCTION



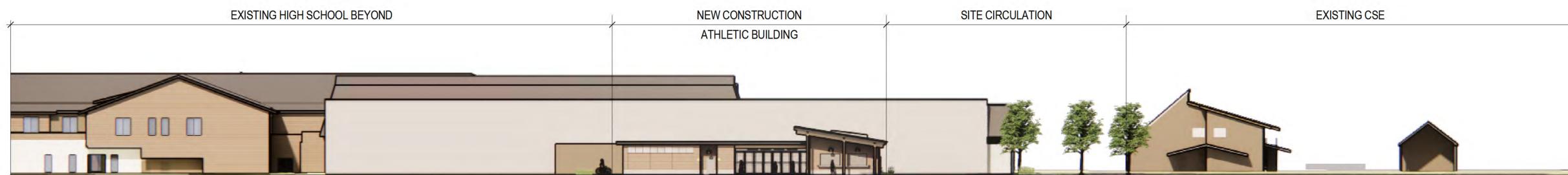
SITE SECTION - LOOKING SOUTH



SITE SECTION - LOOKING NORTH



SITE SECTION - LOOKING EAST



SITE SECTION - LOOKING WEST

SITE SECTIONS
WHITEFISH HIGH SCHOOL - ATHLETIC IMPROVEMENTS
project
owner WHITEFISH HIGH SCHOOL

project # 24196.10

No. Description Date

phase
100% DESIGN
DEVELOPMENT
NOT FOR CONSTRUCTION



issue date
OCT 22, 2025

A6.4



VIEW OF F-WING ADDITION





VIEW OF F-WING ADDITION





VIEW OF CTE WING





**WHITEFISH
HIGH SCHOOL**

VIEW OF MAIN ENTRY





VIEW OF ENTRY





VIEW OF EAST ELEVATION





VIEW OF RESTROOM ENTRY



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PLANNING & BUILDING DEPARTMENT
418 E. 2nd Street, PO Box 158, Whitefish, MT 59937
(406) 863-2410 Fax (406) 863-2409



January 5, 2026

Mayor and City Council
City of Whitefish
PO Box 158
Whitefish MT 59937

RE: Bonsai Brewery (WCUP 25-12)

Honorable Mayor and Council:

Summary of Requested Action: This is a request for a Conditional Use Permit (CUP) by Little Bear Developments No 4, LLC for a Conditional Use Permit in order to add a Beer and Wine liquor license to expand sales at Bonsai Brewery to include wine and to allow them to operate past 8 p.m. The business is located at 549 Wisconsin Avenue and 635 Denver. The properties can be legally described as Lots 1, Densin Subdivision, and Lot 2 of Half Full Subdivision, in S25 T31N R22W. The property is zoned WB-1 (Limited Commercial District).

Planning & Building Department Recommendation: Staff recommended approval of the Conditional Use Permit application subject to eight (8) conditions set forth in the attached staff report.

Public Hearing: The applicant, Daniel Wright, 28 Fairview Drive, spoke and answered questions. No other members of the public spoke at the December 18, 2025 public hearing. The draft minutes for this item are attached as part of this packet.

Planning Commission Action: The Whitefish Planning Commission met on December 18, 2025 and considered the request. Following the hearing, the Commission moved (Norton/Wurster) and voted to unanimously recommend approval of the project.

Proposed Motion:

- I move to approve WCUP 25-12, the Findings of Fact in the staff report and the eight (8) conditions of approval, as recommended by the Whitefish Planning Commission on December 18, 2025.

This item has been placed on the agenda for your regularly scheduled meeting on January 5, 2026. Should Council have questions or need further information on this matter, please contact the Planning Commission or the Planning & Building Department.

Respectfully,



David Taylor, AICP
Director

Att: Exhibit A: Whitefish Planning Commission Recommended Conditions of Approval
Draft Minutes, Planning Commission Meeting, 12-18-25

Exhibits from December 18, 2025 Staff Packet

1. Staff Report – WCUP 25-08

The following were submitted by the applicant:

2. Application for Conditional Use Permit, 10-24-25
3. Previously issued CUP's for Bonsai
4. Public comments

c: w/att Michelle Howke, City Clerk

c: w/o att Applicant

**Exhibit A
BONSAI
WCUP 25-12
Whitefish Planning Commission
Recommended Conditions of Approval
December 18, 2025**

1. The project shall be in compliance with the site plan submitted on November 18, 2025, except as amended by these conditions. Any significant deviation from the plan will require approval.
2. Any major changes to the interior must be reviewed and approved by the Building Department. Any future exterior modifications, including changing paint color, will require Architectural Review approval.
3. The existing parking lot must be striped with paint to delineate all paved parking spaces, including two handicap parking spaces as required by Federal law for parking lots from 25 to 50 spaces.
4. Outdoor live music shall not occur past 10 p.m. per the City noise ordinance. (§5-2-5)
5. The Fire Department requires the applicant to comply with all city fire codes for this classification of occupancy. (UFC)
6. All on-site lighting shall be dark sky compliant. (§11-3-25)
7. All conditions of previously approved conditional use permits WCUP 13-06 and WCUP 17-12 for the brewery shall continue to be complied with.
8. The conditional use permit is valid for 18 months and shall terminate unless commencement of the authorized activity has begun. (§11-7-8)

PLANNING COMMISSION
December 18, 2025
6:00 PM

A) CALL TO ORDER

Vice Chair Toby Scott called the regular meeting of the Planning Commission to order. Board members present were Phil Boland, Mallory Phillips, Toby Scott, Scott Wurster and Rebecca Norton. Whitney Beckham and Jon Heberling were absent. City staff present were Planning Director David Taylor, Public Works Director Craig Workman, Planner I Lauren Macdonald, and Legal Assistant Bree James.

There were approximately 6 people attending in addition to Board Members and Staff.

B) AGENDA CHANGES

None

C) APPROVAL OF THE OCTOBER 16, 2025, MINUTES

Phillips made a motion, seconded by Wurster to approve the minutes. Norton recused herself due to not attending the previous meeting. **The motion passed unanimously.**

D) COMMUNICATIONS FROM THE PUBLIC (Items not on the agenda)

None

E) UNFINISHED BUSINESS

None

F) PUBLIC HEARINGS

1. WCUP 25-12 A request by Little Bear Developments No4 LLC for a Conditional Use Permit to add and beer and wine license to an existing brewery. The property is currently developed as a commercial brewery and restaurant and is zoned WB-1 (Limited Business District). The property is located at 549 Wisconsin Avenue and can be legally described as Lot 1, Densin & Lot 2, Half Full in S25, T31N, R22W, P.M.,M. Flathead County, Montana.

Planning Director David Taylor reviewed the staff report, findings and conditions of the request. As for the writing of this report, comments from three individuals have been

received, two supporting the CUP and one with concerns about outdoor noise at night and proximity to the bike path.

Staff recommended adoption of the findings of facts within staff report WCUP 25-12 for **approval** of a CUP to add a beer and wine license to the existing brewery.

COMMUNICATIONS FROM THE BOARD

Norton is concerned about the noise and asked if they could restrict hours to 8:00 pm instead of 10pm.

Boland reminded the board about the 10pm noise ordinance.

Director Taylor noted that no other similar business has such restrictions and similar facilities with outside music options must cease by 10 pm.

COMMUNICATIONS FROM APPLICANT/AGENCIES

David Wright, 28 Fairview Drive, told the board they will only be open until 10:00 pm during the summer, and they stopped the music at 8pm last October. Their long-term goal is to build an indoor kitchen at this location and may move the manufacturing to a larger area in Whitefish.

Norton asked they keep the noise in mind.

MOTION AND VOTE (WCUP 25-12)

Norton made a motion, seconded by Wurster to approve the WCUP (25-12). The motion passed unanimously.

2. WCUP 25-13 A request by Shane Jacobs, representing the Whitefish School District for a Conditional Use Permit for Whitefish High School. The permit pertains to proposed academic expansions and athletic facility improvements. The properties are currently developed as an athletic fields and associated storage facilities as well as a school structure and is zoned WR-1 (One-Family Residential District). The property is located at 1143 4th Street and can be legally described as Tract 5 and 5E, in the SW ¼ and NW ¼ in S32 T31N R21W, P.M.M., Flathead County.

Planner I Lauren Macdonald reviewed the staff report, findings and conditions of this request. As of the writing of WCUP 25-13 one comment has been received with concerns of an alley connecting 2nd Street and 4th Street, ending at the entrance of Willow Brook Close.

**BONSAI BREWERY
CONDITIONAL USE PERMIT
WCUP 25-12
DECEMBER 18, 2025**



This is a report to the Whitefish Planning Commission and the Whitefish City Council regarding a request by Little Bear Developments No 4, LLC for a Conditional Use Permit in order to add a Beer and Wine liquor license to expand sales at Bonsai Brewery to include wine and to allow them to operate until 11 p.m. The business is located at 549 Wisconsin Avenue and 635 Denver. The properties can be legally described as Lots 1, Densin Subdivision, and Lot 2 of Half Full Subdivision, in S25 T31N R22W. The property is zoned WB-1 (Limited Commercial District). This application has been scheduled before the Whitefish Planning Commission for a public hearing on Thursday, **December 18, 2025**. A recommendation will be forwarded to the City Council for a subsequent public hearing and final action on Monday, **January 5, 2026**.



PROJECT SCOPE

Little Bear LLC has applied to expand operations of the microbrewery and tasting room located at 549 Wisconsin and 635 Denver to include a full beer and wine license. There is an existing Conditional Use Permit for a brewery, but the addition of a full beer and wine license requires an additional conditional use permit.

The brewery and tap room and restaurant will continue to operate as usual, but they will now have the ability to stay open until 11 p.m. during the summer months and serve wine. No other changes to the facility are proposed.

- A. OWNER:**
Little Bear Developments No 4, LLC
635 Denver Street
Whitefish, MT 59937

B. SIZE AND LOCATION OF PROPERTY:

The project is located at 549 Wisconsin Avenue and 635 Denver and is legally described as Lot 1, Densin Subdivision, and Lot 2 of Half Full Subdivision, S25 T31N R22W, P.M.M., Flathead County, Montana. The combined properties comprise 1.5 acres.



C. EXISTING LAND USE:

The subject property is currently developed with a microbrewery and tasting room as well as a fenced outside seating area and parking areas.

D. ADJACENT LAND USES AND ZONING:

North:	Professional office	WR-3
West:	Restaurant	WB-1
South:	Parking lot/Bed & breakfast	WB-1
East:	Professional office	WB-1

E. ZONING DISTRICT:

The property is zoned WB-1 (Limited Business District). The purpose of the WB-1 District ‘for limited commercial uses within or adjacent to residential district to meet certain convenience services catering to the daily needs of those residents living within one mile of the district.’

F. WHITEFISH CITY-COUNTY GROWTH POLICY DESIGNATION:

The Growth Policy designation is Neighborhood Commercial which corresponds to the WB-1 zoning district.

“Neighborhood commercial is usually defined as commercial uses that mainly draw clientele from a smaller, sub-community area. Uses include convenience stores, personal services such as a barber shop or salon, and agency offices such as a branch bank, real estate, or insurance. The purpose of neighborhood commercial is usually for the convenience of residents of nearby neighborhoods as well as passers-by. They tend to be pedestrian oriented, shorten vehicle trips, and generate far more non-motorized trips than general commercial, which is more often auto oriented.”

G. UTILITIES:

Sewer:	City of Whitefish
Water:	City of Whitefish
Solid Waste:	Republic Services
Electric:	Flathead Electric Co-op
Natural Gas:	Northwestern Energy
Police:	City of Whitefish
Fire:	Whitefish Fire Department

H. PUBLIC COMMENTS:

A notice was mailed to adjacent land owners within 300-feet of the subject parcel on November 26, 2025. A notice was emailed to advisory agencies on November 26, 2025. A notice of the public hearing was published in the *Whitefish Pilot* on November 26, 2025. As of the writing of this report, comments from three individuals have been received, two supporting the CUP and one with concerns about outdoor noise at night and proximity to the bike path.

REVIEW AND FINDINGS OF FACT

This application is evaluated based on the "criteria required for consideration of a Conditional Use Permit," per Section 11-7-8(J) of the Whitefish Zoning Regulations.

1. Growth Policy Compliance:

Finding 1: The proposed use complies with Growth Policy Designation of Neighborhood Commercial because it is zoned WB-1 (Limited Business District) and the proposed use is consistent with the WB-1 zone.

2. Compliance with regulations. The proposal is consistent with the purpose, intent, and applicable provisions of these regulations.

The property is zoned WB-1, which conditionally permits bars and lounges as well as microbreweries located on parcels with frontage on arterials. There are no proposed changes to the footprint of the existing buildings. Any future proposed changes to the building will require full compliance with the zoning regulations. Although none are proposed, any exterior modifications will require compliance with the Architectural Design standards.

Finding 2: The project complies with the zoning regulations because all the zoning standards are being met or will be met with conditions of approval.

3. Site Suitability. The site must be suitable for the proposed use or development, including:

Adequate usable land area: The subject properties combined are over one and a half acres in size, so there is adequate land area for the business.

Access that meets the standards set forth in these regulations, including emergency access: The existing access of Denver Street will remain. Suitable emergency access can be made from both Wisconsin Avenue and Denver Street.

Absence of environmental constraints that would render the site inappropriate for the proposed use or development, including, but not necessarily limited to floodplains, slope, wetlands, riparian buffers/setbacks, or geological hazards: The proposed development is not located within the 100-year floodplain nor within an area mapped for high groundwater. There are no water bodies within 200-feet of the project.



Finding 3: Project is suitable for the site because there is adequate usable land area, access standards are met, and there are no environmental constraints.

4. Quality and Functionality. The site plan for the proposed use or development has effectively dealt with the following design issues as applicable.

Parking locations and layout: No changes are proposed to the existing parking lot, which is adequate for the use and meets the City's parking requirements. The site also currently provides bike racks and locations for motorcycle parking.

Traffic Circulation: The applicant is not changing the traffic circulation patterns of the parking area. Traffic will continue to access off Denver Street.

Open space: The site plan has adequate open space. The brewery has an extensive landscaped outdoor seating area as well as an overflow parking area.

Fencing/Screening: The brewery has an existing privacy fence installed adjacent to the bed and breakfast to the south, and they have an existing split rail fence around the entire outdoor seating area. No additional fencing or screening is proposed.

Landscaping: The outdoor seating area is well-landscaped. There is additional landscaping along the eastern and southern property line. The existing landscaping meets city standards.

Signage: No new signage is proposed. All existing signage is permitted and meets city standards.

Undergrounding of new and existing utilities: The existing overhead utilities along Wisconsin Avenue cannot be underground.

Finding 4: The quality and functionality of the proposed development has effectively dealt with the site design issues because there is adequate circulation and open space. No changes are being proposed to their existing site or parking areas.

5. Availability and Adequacy of Public Services and Facilities.

Sewer: Sewer is in place and adequate to service the project.

Water: Water services are currently available on site.

Storm Water Drainage: No changes are being proposed to impervious surfaces.

Fire Protection: The Whitefish Fire Department serves the site and response times and access are good. The proposed use is not expected to have significant impacts upon fire services.

Police: The City of Whitefish serves the site; response times and access are adequate. The proposed use is not expected to have significant impacts upon police services.

Streets: The project is accessed off of Denver Street. No street improvements are proposed or required.

Finding 5: Municipal water and sewer are available. Response times for police and fire are not anticipated to be affected due to the proposed development. The property has adequate access to a city street.

6. Neighborhood/Community Impact:

Traffic Generation: No additional traffic will be generated by the additional beer and wine license. The brewery is not expanding floor area or brewing capacity. While it may be open two extra hours in the summer, that is unlikely to generate significant additional traffic.

Noise or Vibration: The brewery does have an exterior seating area that occasionally has live music in the warmer months like many city drinking establishments. City noise ordinance prohibits outdoor live music after 10 pm. No vibration is anticipated to be generated from the proposed use.

Dust, Smoke, Glare, or Heat: No impact is anticipated beyond what would be expected from a typical commercial use.

Smoke, Fumes, Gas, and Odor: No impact is anticipated with regards to smoke, fumes or gas. Breweries emit a slight odor of roasting cereal grain.

Hours of Operation: The hours of operation will be from 11 am to 8 pm in winter, 11 am until 11 pm in summer.

Finding 6: The proposed development is not anticipated to have a negative neighborhood impact. Negative impacts from dust, smoke, odor or other environmental nuisances are not expected. City noise regulations prohibit outdoor live music after 10 p.m. All outdoor lighting is required to meet city standards.

7. Neighborhood/Community Compatibility:

The neighborhood is a combination of commercial and single family to multi-family residential uses. The structural bulk and massing, density and scale of the project will not be changed from the current configuration. Parking on site is adequate. Any exterior changes to the structure will require Architectural Review approval to ensure neighborhood compatibility. No changes are proposed at this time.

Finding 7: The project is compatible with the existing uses in the neighborhood because it is an established business, on-site parking is adequate, there are no proposed changes to the building, it fits within the context of the neighborhood and community character.



RECOMMENDATION

It is recommended that the Whitefish Planning Commission adopt the findings of fact within staff report WCUP 25-12 and that this conditional use permit for a beer and wine license be recommended for **approval** to the Whitefish City Council, subject to the following conditions:

1. The project shall be in compliance with the site plan submitted on November 18, 2025, except as amended by these conditions. Any significant deviation from the plan will require approval.
2. Any major changes to the interior must be reviewed and approved by the Building Department. Any future exterior modifications, including changing paint color, will require Architectural Review approval.
3. The existing parking lot must be striped with paint to delineate all paved parking spaces, including two handicap parking spaces as required by Federal law for parking lots from 25 to 50 spaces.
4. Outdoor live music shall not occur past 10 p.m. per the City noise ordinance. (§5-2-5)
5. The Fire Department requires the applicant to comply with all city fire codes for this classification of occupancy. (UFC)
6. All on-site lighting shall be dark sky compliant. (§11-3-25)
7. All conditions of previously approved conditional use permits WCUP 13-06 and WCUP 17-12 for the brewery shall continue to be complied with.
8. The conditional use permit is valid for 18 months and shall terminate unless commencement of the authorized activity has begun. (§11-7-8)



City of Whitefish
 Planning & Building Dept
 418 E 2nd St | PO Box 158
 Whitefish, MT 59937
 Phone: 406-863-2410

File #: WCUP-25-12
 Date: 10/24/25
 Intake Staff: (SF)
 Check #: _____
 Amount: 2,055
 Acct #: 1000 101000 341063
 Date Complete: _____

CONDITIONAL USE PERMIT

FEE ATTACHED \$ 2,055
 (see current fee schedule)

INSTRUCTIONS:

- A Site Review Meeting with city staff is required. Date of Site Review Meeting: _____
- Submit the application fee, completed application, and appropriate attachments to the Whitefish Planning & Building Department a minimum of **forty-five (45) days prior** to the Whitefish Community Development Board meeting at which this application will be heard.
- The regularly scheduled meeting of the Whitefish City Planning Board is the third Thursday of each month at 6:00PM in the Council Chambers at 418 E 2nd Street.
- After the Community Development Board hearing, the application is forwarded with the Board's recommendation to the next available City Council meeting for hearing and final action.

A. PROJECT INFORMATION:

Project Name: Bonsai Brewery
 Street Address: 549 Wisconsin Ave.
 Assessor's Tract No.(s) 07-4292-25-4-04-45-0000 Lot No(s) Lot 1
 Block # _____ Subdivision Name Densin Sub
 Section 25 Township 31 North Range 22 West

I hereby certify that the information contained or accompanied in this application is true and correct to the best of my knowledge. The signing of this application signifies approval for the Whitefish Staff to be present on the property for routine monitoring and inspection during the approval and development process.

Charlotte Lubert
 Owner's Signature**

10/24/25
 Date

Charlotte Lubert
 Print Name

Daniel Wright
 Applicant's Signature

10/24/25
 Date

Daniel Wright
 Print Name

 Representative's Signature

 Date

 Print Name

** May be signed by the applicant or representative. authorization letter from owner must be attached. If there are multiple owners, a letter authorizing one owner to be the authorized representative for all must be included.

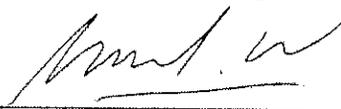
B. APPLICATION CONTENTS:

Attached ALL ITEMS MUST BE INCLUDED - INCOMPLETE APPLICATIONS WILL NOT BE ACCEPTED

- One (1) printed copy and one (1) electronic copy of the application and supplemental materials
- Written description of how the project meets the criteria in Section E
- Site Plan – drawn to scale, which shows in detail the proposed use, property lines and setback lines, existing and proposed buildings, traffic circulation, driveways, parking, landscaping, fencing, signage, all public trees within 50-feet of the property and any unusual topographic features such as slopes, drainage, ridges, etc.
- Will this project provide affordable housing: Yes No If yes, complete a Housing Mitigation Plan
- Where new buildings or additions are proposed, building sketches and elevations must be submitted
- Tree Preservation Plan – show a site plan with trees 6-inch DBH or greater to be preserved with project
- Public Trees – show all public trees to be saved or removed. Any public trees proposed to be removed must be approved by the Director of Parks and Recreation.
- If the project is a multi-family development, complete the **Multi-Family Development Standards Supplemental**
- If the project is a mixed-use or non-residential development, complete the **Mixed-Use and Non-Residential Building Development Standards Supplemental**
- \$100 deposit for sign to be posted on-site for the duration of the review process. (submit a separate check which will be returned to you **after you return the sign to the Planning Office.**)
- Any additional information requested during the pre-application process

When all application materials are submitted to the Planning & Building Department, the application will be scheduled for public hearing before the Community Development Board and City Council.

I understand I am responsible for maintaining the public notice sign on the subject property during the entire public process. I understand I will forfeit my \$100.00 deposit, if I do not return the public notice sign to the Planning & Building Department in good condition after the public review.



Applicant Signature

10/24/2025

Date

C. OWNER/APPLICANT INFORMATION

OWNER(S) OF RECORD:

Name: Little Bear Developments No4 LLC Phone: 4079231474
Mailing Address: 635 denver street
City, State, Zip: whitefish, montana, 59937
Email: info@ecoresidency.com

APPLICANT (if different than above):

Name: _____ Phone: _____
Mailing Address: _____
City, State, Zip: _____
Email: _____

OTHER TECHNICAL/PROFESSIONAL:

Name: _____ Phone: _____
Mailing Address: _____
City, State, Zip: _____
Email: _____

D. DESCRIBE PROPOSED USE:

Little Bear LLC is requesting a Conditional Use Permit to allow the addition of a Montana Beer and Wine License to the existing brewery, taproom, and kitchen operation located at 549 Wisconsin Avenue. The intent is to complement the current beer service by offering wine to guests, enhancing the dining and hospitality experience without changing the existing business model or site layout.

No new construction, structural modifications, or increases in occupancy are proposed. All food service, operations, and management will remain consistent with the previously approved CUP for the brewery and restaurant. This request is a low-impact addition intended solely to expand beverage offerings and improve guest experience for both residents and visitors.

ZONING DISTRICT: WB -1

E. REVIEW CRITERIA: The following criteria form the basis for approval or denial of the Conditional Use Permit. The burden of satisfactorily addressing these criteria lies with the applicant. Review the criteria below and discuss how the proposal conforms to the criteria. If the proposal does not conform to the criteria, describe how it will be mitigated.

1. Describe how the proposal conforms to the applicable goals and policies of the Whitefish City-County Growth Policy.

The proposal supports the Whitefish City-County Growth Policy by enhancing an existing mixed-use neighborhood destination and promoting year-round local business vitality.

The small-scale addition of wine service complements the established brewery/restaurant use, encourages pedestrian activity, and reinforces the area's role as a neighborhood gathering place consistent with the Growth Policy's economic-development and community-character goals.

2. Describe how the proposal is consistent with the purpose, intent and applicable provisions of the regulations.

The request aligns with the intent of the WB-1 Neighborhood Business District to provide neighborhood-serving retail, restaurant, and hospitality uses that are compatible with nearby residential areas. All site development, parking, and landscaping remain compliant with existing approvals; no structural or intensity changes are proposed.

3. How is the property location suitable for the proposed use? Is there adequate usable land area? Does the access, including emergency vehicle access, meet the current standards? Are environmentally sensitive areas present on the property that would render the site inappropriate for the proposed use?

The site is already developed for a brewery/taproom/kitchen and has adequate usable land area, access, and parking. All access points, including emergency-vehicle access, meet current standards. No environmentally sensitive areas are present, and no new site disturbance will occur.

4. How are the following design issues addressed on the site plan?
 - a. Parking locations and layout
 - b. Traffic circulation
 - c. Open space
 - d. Fencing/screening
 - e. Landscaping
 - f. Signage
 - g. Undergrounding of new utilities
 - h. Undergrounding of existing utilities

No physical changes are proposed. Parking, traffic circulation, open space, fencing, landscaping, and signage will remain as currently approved. All existing utilities are underground.

5. Are all necessary public services and facilities available and adequate? If not, how will public services and facilities be upgraded?
 - a. Sewer
 - b. Water
 - c. Stormwater
 - d. Fire Protection
 - e. Police Protection
 - f. Street (public or private)
 - g. Parks (residential only)
 - h. Sidewalks
 - i. Bike/pedestrian ways – including connectivity to existing and proposed developments

All necessary public services—sewer, water, stormwater, fire and police protection, and street access—are in place and adequate. The proposal does not increase demand on public facilities.

6. How will your project impact on adjacent properties, the nearby neighborhoods and the community in general? Describe any adverse impacts under the following categories.
 - a. Excessive traffic generation and/or infiltration of traffic into neighborhoods
 - b. Noise, vibration, dust, glare, heat, smoke, fumes, odors

No adverse impacts are anticipated. Operations will continue under the same management and conditions as the existing CUP, with only a modest seasonal variation in hours to accommodate summer tourism (closing at 11 p.m. in summer versus 8 p.m. in winter). Traffic, noise, and parking patterns remain consistent with current activity levels.

7. What are the proposed hours of operation?

Summer: 11 a.m.–11 p.m.

Winter: 11 a.m.–8 p.m.

Outdoor seating will continue seasonally, consistent with prior approvals.

8. How is the proposal compatible with the surrounding neighborhood and community in general in terms of the following:

- a. Structural bulk and massing
- b. Scale
- c. Context of existing neighborhood
- d. Density
- e. Community Character

The proposal is fully compatible with the surrounding neighborhood. The structure, scale, and density remain the same as the existing brewery/restaurant. The addition of wine enhances guest experience without altering community character or creating new impacts.

9. Please address how this proposal meets the specific development criteria found in 11-3 special provisions for the use requested.

The project meets all applicable development criteria for food-and-beverage establishments under § 11-3 of the Whitefish Zoning Regulations. The use remains identical in function and intensity to the currently permitted brewery/restaurant; the only modification is expanding beverage service to include wine under a valid Montana Beer/Wine License.

PLANNING & BUILDING DEPARTMENT
418 E Second, PO Box 158 Whitefish, MT 59937
(406) 863-2410 Fax (406) 863-2409



January 3, 2018

Graham Hart
Bonsai Brewing Project LLC
635 Denver
Whitefish, MT 59937

Subject: Conditional Use Permit for Bonsai Brewing (WCUP 17-12)

Dear Mr. Hart:

The City of Whitefish City Council **approved** your Conditional Use Permit request to expand a micro-brewery at 549 Wisconsin and 635 Denver at their meeting of January 2, 2018. This approval is subject to the following conditions:

1. The project shall be in compliance with the site plan submitted on November 6, 2017, except as amended by these conditions. Any significant deviation from the plans shall require approval.
2. All existing and proposed parking shall be paved. No gravel parking shall be permitted. No parking shall be permitted within the Denver Street right-of-way. (§11-6)
3. If any new impervious surface is created that exceeds 5,000 square feet, an engineered stormwater plan shall be submitted for review and approval to the Public Works Department. (Whitefish Engineering Standards, Section 5).
4. An updated parking lot design and landscaping plan that meets the requirements of §11-6-3-2 and §11-6-5 must be submitted and approved within 30 days of CUP approval, and the proposed paving and landscape improvements installed by September 1, 2018.
5. Any major changes to the interior of 635 Denver shall be reviewed and approved by the Building Department. Any future exterior modifications, including changing paint color, will require Architectural Review.
6. The Fire Department requires the applicant to comply with all city fire codes for this classification of occupancy. (UFC)
7. All on-site lighting shall be dark sky compliant. (§11-3-25)

8. The conditional use permit is valid for 18 months and shall terminate unless commencement of the authorized activity has begun. (§11-7-8)

If you have any questions, please feel free to contact our office at 863-2410.

Sincerely,

A handwritten signature in blue ink, appearing to read "David Taylor".

David Taylor, AICP
Director

C: Building Department

PLANNING & BUILDING DEPARTMENT
510 Railway Street, PO Box 158, Whitefish, MT 59937
(406) 863-2410 Fax (406) 863-2409



November 5, 2014

Graham Hart
Bonsai Brewery Project IIc
PO Box 1558
Whitefish, MT 59937

Re: microbrewery at 549 Wisconsin Avenue; (WCUP 14-05)

Mr. Hart:

On November 3, 2014, the Whitefish City Council approved your request for a CUP subject to ten conditions of approval, enclosed herein. The CUP approved was according to the application submitted September 4, 2014.

The conditional use permit is valid for a period of 18 months from the date of approval or until March 4, 2016.

Please let me know if you have any questions.

Sincerely,

A handwritten signature in black ink that reads "Wendy Compton-Ring". The signature is written in a cursive, flowing style.

Wendy Compton-Ring, AICP
Senior Planner

C: Building Department
Fire Department
Public Works Department

Exhibit A
Bonsai Brewery Project IIC
Conditional Use Permit
WCUP 14-05
Whitefish City Council
Conditions of Approval
November 3, 2014

The Whitefish City Council approved the project subject to the following conditions of approval:

1. The project shall be in compliance with the plan submitted on September 4, 2014, except as amended by these conditions. Any significant deviation from the plans shall require approval.
2. All existing and proposed parking shall be paved. No gravel parking shall be permitted. (§11-6)
3. If any new impervious surface is created that exceeds 5,000 square feet, an engineered stormwater plan shall be submitted for review and approval to the Public Works Department. (Whitefish Engineering Standards, Section 5)
4. Water service may need to be upgraded to accommodate proposed use. Proposed flow requirements need to be evaluated. All wastewater discharges must be in compliance with all the rules and regulations of the wastewater utility per the Public Works Department. (Whitefish Engineering Standards, Section 3, 4)
5. Necessary business licenses, sign permits and a fence permit shall be obtained. (§3-1, §11-5-7, §11-3-11)
6. The existing building will need a professional design. This design shall be reviewed and approved by the Building Department.
7. The Fire Department requires the applicant to comply with all city fire codes for this classification of occupancy. (UFC)
8. All on-site lighting shall be dark sky compliant. (§11-3-25)
9. A landscaping plan that incorporates existing, healthy trees into the plan shall be reviewed and approved by the Planning Department prior to occupancy of the building. (§11-4)
10. The conditional use permit is valid for 18 months and shall terminate unless commencement of the authorized activity has begun. (§11-7-8)

From: [Philip Dorr](#)
To: [David Taylor](#)
Cc: [Kurt Dorr](#); gerald@haddockinvestments.com
Subject: Bonzi Brewing Request before the Whitefish Planning Commission
Date: Saturday, December 6, 2025 6:22:30 PM

You don't often get email from philip.dorr@wviainc.com. [Learn why this is important](#)

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Mr. Taylor:

As one of the owners of the property at 640 Denver Street I love what Bonzi Brewing Company's new ownership is doing to upgrade this wonderful business. Bonzi Brewing is an institution in the Whitefish community as you well know. They have always been a great neighbor, and I have no doubt with this new ownership team in place they will continue in this same vein.

Bonzi Brewing is part of what makes Whitefish special and a wonderful community. I am in full support of their desire to further enhance their business and add additional value to all of us in the Whitefish community.

Sincerely,

Philip Dorr

Philip M. Dorr

Cell # 773.870.9900

Philip.Dorr@wviainc.com

From: kurt.dorr@gmail.com
To: [David Taylor](#)
Subject: Bonsai Brewing Project
Date: Saturday, December 6, 2025 3:42:11 PM

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As one of the owners of 640 Denver St, I support this project by Bonsai Brewing. I believe it will be a nice addition to the neighborhood. Thank you for your consideration.

Best regards,

Kurt Dorr

From: [Tom Shanahan](#)
To: [David Taylor](#)
Subject: Comment for Bonsai Brewing Project Land Use Application
Date: Tuesday, December 2, 2025 6:57:27 PM

You don't often get email from tshan0103@aol.com. [Learn why this is important](#)

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Hello:

I received notice of the proposed land use action regarding the Bonsai Brewing Project. Thank you for providing the opportunity for me to comment.

I wish the new business owners the best of success. However, I do have some concerns that I would like to provide as comments and would appreciate any further information/clarification on these matters:

1. I am concerned that the business will create noise later into the night. The previous owners used to hold a "Vinyl Night" that produced a large volume of noise from a large speaker system. I live a block away (Circle Estates - 600 block of Wisconsin Avenue) and I could still hear the music with my windows closed. There are homes even closer to the business. I work very early in the morning, have insomnia issues and need rest. I would not want to have to listen to this noise late at night. On one occasion, I asked the previous staff if they could turn down the music and they were noncooperative and rather dismissive of my concerns. I think it is only considerate that both businesses and residences respect their neighbors by ensuring that loud noise does not extend beyond their property line.

2. The proximity of Bonsai Brewing Project to the public bike/walking path that abuts residences is also a concern. Especially during the Summer, obviously intoxicated individuals on the path are sometimes yelling or involved in some other kind of disturbance. The extended operating hours would only make this situation worse. I realize the majority of patrons behave themselves, but here are certain realities that need to be addressed with establishments that serve alcohol in areas close to homes. I have also observed children and families using the path during late summer evenings. Perhaps a business operation such as this would be more suitable for downtown or in a more purely commercial district.

I would ask the Planning Commission and City Council consider these additional factors when reviewing this application:

1. Given that residences were in place prior to Bonsai Brewing Project moving to its current location, I believe that it is incumbent upon the business to comport itself to the residential character of the immediate area and not vice versa. This would only be fair to the working people and their children who live nearby.

2. The zoning for this location is WB-1 (Limited Commercial District). The permitted uses in this district reflect low intensity activities such as small retail, offices and B & Bs with normal business hours. The goal for this land use designation is to preserve quality of life for the surrounding neighborhood by maintaining a quiet and peaceful environment. Approval for the expansion of operating hours and potential loud noise run counter to the basic rationale behind for this zoning designation.

3. I appreciate that making public policy decisions business is a delicate balancing act. However, I would hope that the appointed and elected officials take the position that the well-being of residents takes precedence over the needs of a profit seeking business trying to alter the original conditions placed upon a new use that was added to the neighborhood.

I am the president of my HOA and I have heard similar concerns from other members regarding noise and other problems arising from this location.

I plan on attending the Planning Commission and City Council hearings on this application. Would it be possible to obtain a PDF copy of the application with more detailed information on the owner's plan with the new property? Lastly, could you please confirm receipt of this email.

Thank you again for allowing me to comment on this proposed land use action. I certainly hope that resident concerns are taken into account when considering this application.

Sincerely,

Tom Shanahan

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RESOLUTION NO. 26-___

A resolution of the City Council of the City of Whitefish, Montana, approving an increase in ambulance fees and establishing new fees for certain fire rescue services provided by the Whitefish Fire Department.

WHEREAS, the Whitefish Fire Department currently charges fees when the ambulances it operates provide Basic Life Support (BLS) services, Advanced Life Support (ALS) services, Transport, and services without Transport to City residents and non-residents; and

WHEREAS, the last fee adjustment for ambulance services was completed on July 1, 2019, in accordance with Resolution No. 16-62 adopted by the City Council on December 5th, 2016; and

WHEREAS, in March 2024 the City hired a consulting firm, Baker-Tilly, to complete a cost-of-service analysis for fire rescue and emergency medical services provided by the Whitefish Fire Department; and

WHEREAS, on May 19, 2025, the City Council accepted and approved the Fire/EMS Cost of Services Report prepared by Baker Tilly incorporated herein as Exhibit A; and

WHEREAS, on May 19, 2025, the City Council directed City staff to schedule a public hearing for the City Council to consider proposed rate increases and new fire rescue fees at levels lower than those recommended in the Fire/EMS Cost of Services Report prepared by Baker Tilly; and

WHEREAS, City staff reviewed the needs of the Whitefish Fire Department, comparison data with other municipalities, and Consumer Price Index changes since the last fee adjustment; and

WHEREAS, City staff recommends an increase in fees currently charged for ambulance services and the establishment of new fees for certain fire rescue services at a rate less than the full cost of services to remain competitive with other local ambulance services in Flathead Valley as follows:

AMBULANCE SERVICES

	Basic Life Support (BLS)	Advanced Life Support (ALS)	Service Provided - No Transport	Transport per Loaded Mile
City Residents or City Property Owners	\$1,304	\$1,531	\$538	\$30.33
Non-residents	\$1,660	\$1,887	\$818	\$30.33

Reimbursable Medicare/Medicaid Costs

Oxygen	\$102.78
Defibrillation Pads	\$102.45
IV Supplies	\$87.60
General Good Medical Administration - BLS	\$88.36
General Good Medical Administration - ALS	\$118.11
12 Lead ECG with Interpretation	\$18.56
Advanced Airway	\$126.21
Extra Attendant	\$69.00
Medications and Supplies	Cost

FIRE RESCUE SERVICES

	Automobile Accidents: Initial response up to 1 hour	Automobile Accidents: Additional per hour rate	Fire Medical Eval/Treatment: Initial response up to 1 hour	Fire Medical Eval/Treatment: Additional per hour rate	Gas Leaks*
City Residents or City Property Owners	\$350	\$350	\$350	\$350	\$1,294
Non-residents	\$357	\$357	\$357	\$357	\$3,546

*Whitefish Fire Service Area residents and property owners are considered City residents for gas leak responses.

; and

WHEREAS, in order to maintain reasonable and equitable rates in future years, City staff recommend the ambulance and fire rescue fees automatically increase annually based on the increase, if any, in the U.S. All Urban Consumers – Medical Care Services (Consumer Price Index) for the twelve-month period ending the preceding December 31 on February 1, 2027, February 1, 2028, February 1, 2029, and February 1, 2030; and

WHEREAS, as required by § 7-6-4013(4), MCA, public notice regarding the proposed fees was published on December 24 and December 31, 2025, in the Whitefish Pilot; and

WHEREAS, at a lawfully noticed public hearing on January 5, 2026, after receiving an oral and written report from staff and inviting public comment, the Whitefish City Council reviewed the recommended fees and found them to be reasonable and related to the cost of providing service; and

WHEREAS, it will be in the best interests of the City of Whitefish, and its inhabitants, to approve the fees as proposed.

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Whitefish, Montana, as follows:

Section 1: All the recitals set forth above are hereby adopted as Findings of Fact.

Section 2: The fees set forth below are hereby amended and established as follows:

AMBULANCE SERVICES

	Basic Life Support (BLS)	Advanced Life Support (ALS)	Service Provided - No Transport	Transport per Loaded Mile
City Residents or City Property Owners	\$1,304	\$1,531	\$538	\$30.33
Non-residents	\$1,660	\$1,887	\$818	\$30.33

Reimbursable Medicare/Medicaid Costs

Oxygen	\$102.78
Defibrillation Pads	\$102.45
IV Supplies	\$87.60
General Good Medical Administration - BLS	\$88.36
General Good Medical Administration - ALS	\$118.11
12 Lead ECG with Interpretation	\$18.56
Advanced Airway	\$126.21
Extra Attendant	\$69.00
Medications and Supplies	Cost

FIRE RESCUE SERVICES

	Automobile Accidents: Initial response up to 1 hour	Automobile Accidents: Additional per hour rate	Fire Medical Eval/Treatment: Initial response up to 1 hour	Fire Medical Eval/Treatment: Additional per hour rate	Gas Leaks*
City Residents or City Property Owners	\$350	\$350	\$350	\$350	\$1,294
Non-residents	\$357	\$357	\$357	\$357	\$3,546

*Whitefish Fire Service Area residents and property owners are considered City residents for gas leak responses.

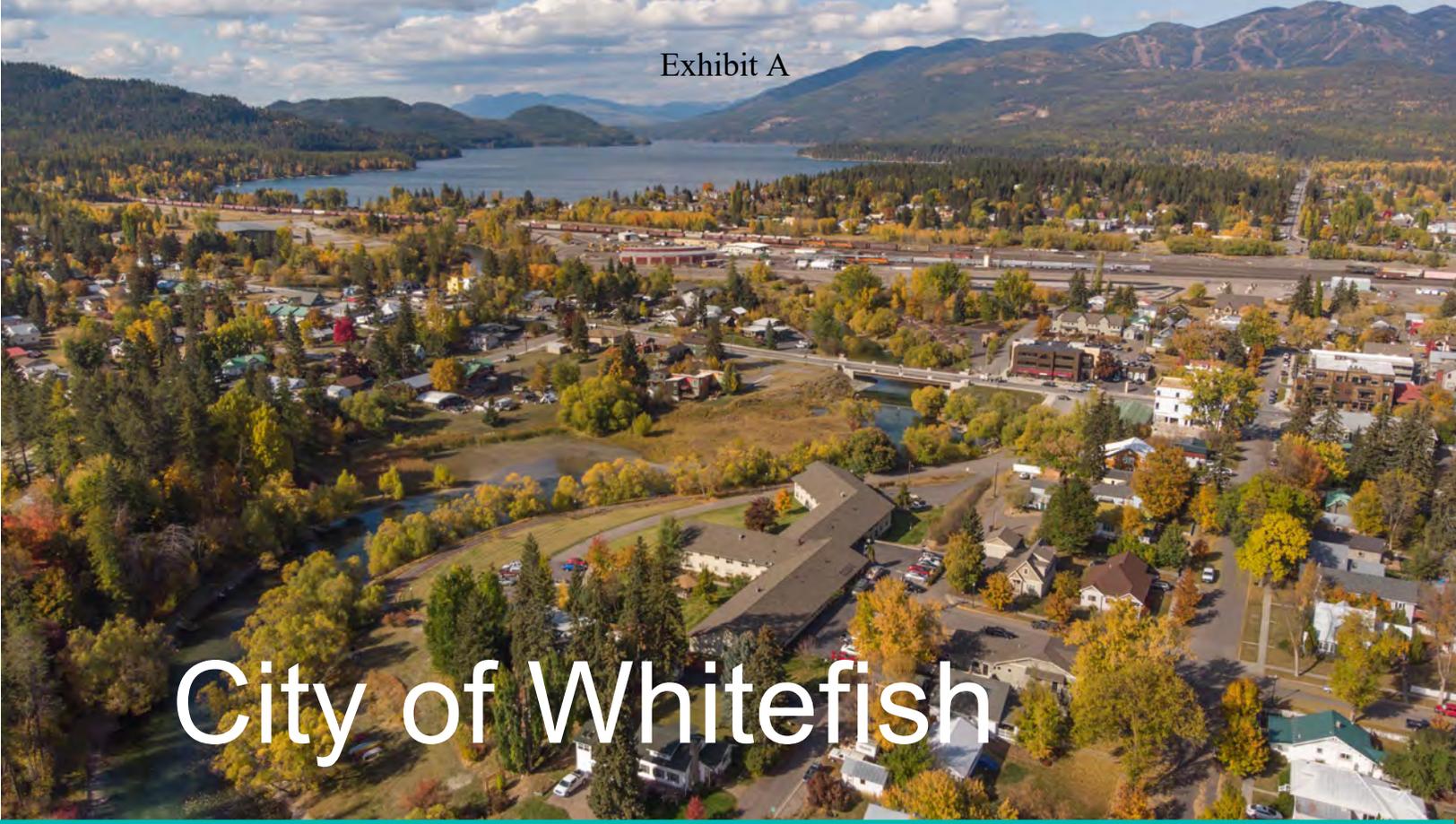
Section 3: This Resolution shall take effect on February 1, 2026, upon its adoption by the City Council, and signing by the Mayor thereof.

PASSED AND ADOPTED BY THE CITY COUNCIL OF THE CITY OF WHITEFISH, MONTANA, THIS _____ DAY OF _____, 2026.

John M. Muhlfeld, Mayor

ATTEST:

Michelle Howke, City Clerk



City of Whitefish

Fire/EMS Cost of Services Report

April 4, 2025





April 4, 2025

Chief Cole Hadley
Whitefish Fire Department
275 Flathead Avenue
Whitefish, MT 59937

Chief Hadley:

Baker Tilly is pleased to transmit this revised report summarizing the findings and recommendations of our cost of services study for the City of Whitefish and its Fire/EMS operations. The focus of this assessment was to review the Department's recent budgets and financial performance to determine the total costs of the Fire and EMS services it provides to the community. We also compared the Department's existing service fees with those charged by a sample of comparable fire and EMS providers in the region. The report includes the adjustments suggested by the City in your March 10th email.

We wish to thank you and all the City of Whitefish staff who worked with us for their assistance in providing us with a variety of information and having candid discussions with our team members to help inform this analysis.

We look forward to meeting with you regarding the recommendations herein in preparation for presenting this report for consideration and adoption.

Sincerely,

Steve Scharff

Director

+1 (406) 692 7966 | steve.scharff@bakertilly.com

Andy Belknap

Managing Director

+1 (408) 385 3408 | andy.belknap@bakertilly.com

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Executive Summary

Baker Tilly was engaged by the City of Whitefish to review the financial performance of the Fire Department in recent years as well as the volume of calls for Fire and EMS services, assign direct and indirect costs for these services, and provide recommendations for charges for service to minimize the tax burden on citizens and cover costs of operations and capital needs. From our analysis of departmental costs, resources, and service demands, we calculated the City's costs of providing Fire and EMS services and outline proposed charges.

Our approach included an analysis of total costs by breaking the costs into discrete components. We reviewed personnel costs, including employee pay and benefits as well as available hours after making adjustments for training and paid time off. We also examined the proportion of time spent by staff on incident response, versus time spent on standby.

In addition to the costs of staffing, we reviewed the Fire Department's non-personnel expenses. These included budgeted amounts for supplies, services, and central support provided by the City for administrative functions like Human Resources, IT, and the like. The last cost component we examined covered the Department's costs for capital replacement, including vehicles and other capital equipment.

Two distinct fees were calculated for most services, based on whether the individual receiving the service is a resident of the Fire District. Our calculations include a credit to residents reflecting their contribution to the Fire Department through local levies and/or assessments. The credit offsets a significant portion of expenses related to time spent on standby. Charges for non-residents do not include any reduction in standby expenses, resulting in higher calculated costs.

Taken together, these cost components provide the City with a total cost for specific types of service, based on the number of staff hours and the equipment involved. Using these costs as a base, we calculated total fees which would need to be charged in order for the City to recover its expenses. Due to the nature of billing and collections for emergency medical services, the total fees billed are required to be substantially higher than the calculated cost if the City wishes to recover its costs after write-offs and adjustments are accounted for.

The fees recommended in this report include increases of 21% to 67%, depending on the type of response. The increases reflect a change in the targeted rate for collections as recommended in the City's Fire Department Master Plan, as well as the fact that expenses have increased considerably since the City's last fee increase in July of 2019.

Background and Project Approach

Background

The City of Whitefish has an area of approximately 7 square miles and a population of over 9,100 full-time residents. Additionally, the City hosts more than 40,000 visitors annually, which has significant impacts on Fire and EMS calls for service. Population projections anticipate continuing growth of 1.1% to 2.1% per year, resulting in a 2045 population of 11,400 to 14,000 full-time residents.

Outside of the city limits, the Fire Department provides fire protection services to the Whitefish Fire Service Area. This area encompasses approximately 86 square miles of unincorporated land with a population of approximately 5,000, bringing the Fire Department's service area population to approximately 14,000 full-time residents, in addition to visitors and seasonal residents.

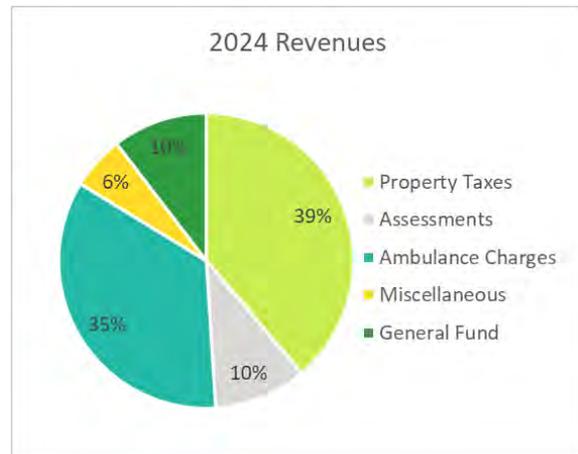
Revenues for the Fire Department come from two primary sources: charges billed to those who use Fire/EMS services (primarily from Ambulance billing), and a local property tax levy dedicated to Fire/EMS services. Smaller revenue amounts come from fire prevention programs and miscellaneous sources.

To the extent that these revenues are insufficient to fund the City's Fire and EMS operations, the City of Whitefish has historically transferred the needed financial resources from the General Fund. In 2023, this fund transfer exceeded \$1 million, representing nearly a quarter of the Fire Department's annual revenue. In 2024, revenues from the dedicated property tax levy rose significantly as a result of property revaluation. This reduced the City's fund transfer to just under \$500,000, which was approximately 10% of total Fire Department revenues for the year.

While the reduced demands on the City's General Fund were a welcome development, the City would like to minimize the need for further fund transfers in future years.

Additionally, the City wishes to maximize the proportion of revenues received from charges for services. While public safety is a critical function of local government, the ability to recover costs from the individuals using these services is an important component of keeping this function affordable and sustainable into the future. Additionally, charges for services allow the City to recover some of its costs from non-residents who generate a significant portion of the demand for services and do not otherwise contribute to funding the Department. In this way, the City can lessen the burden on local taxpayers for services rendered to visitors from out of town. This balance between groups is especially important in a community which hosts as many visitors as Whitefish does each year.

The Fire and Ambulance Fund financial performance from recent years is discussed in more detail later in this report.



Project Approach

Baker Tilly and City of Whitefish staff began the project with a kickoff meeting to discuss the project's scope, objectives and timeline. Baker Tilly employed a multifaceted approach to gather information to inform the recommendations in this report, as summarized below.



Our interviews with City staff proved a very helpful tool for filling in details about Fire and EMS operations that weren't reflected in the background documents we reviewed. Baker Tilly thanks those who participated in interviews and pulled the requested documents for our study; their efforts were critical to the study and are much appreciated.

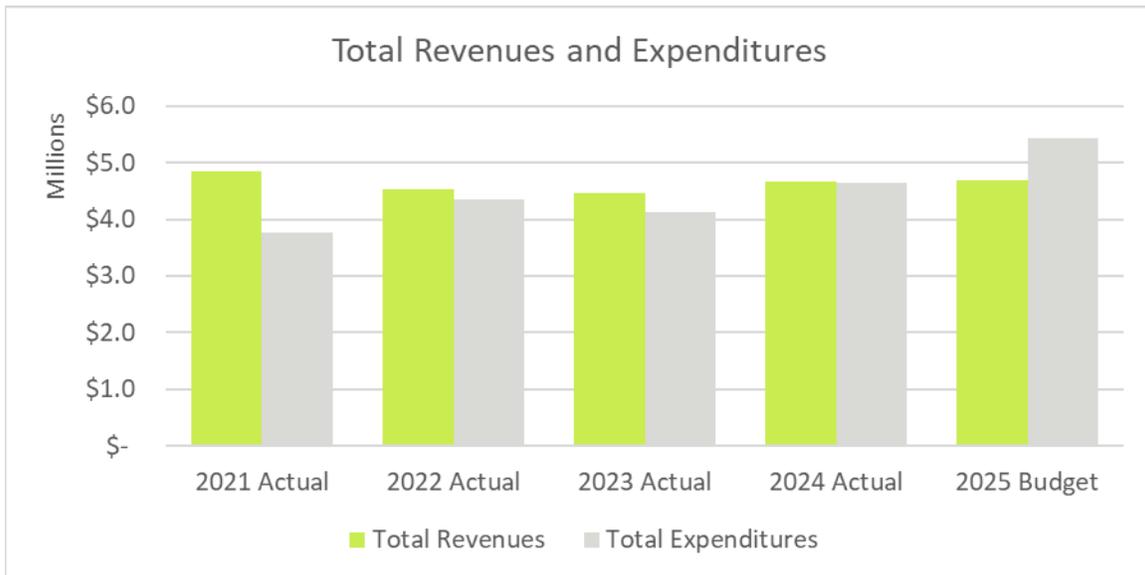
Recent Financial Performance

Our analysis began with a review of revenues and expenses for the EMS and Fire operations since the fiscal year ending in June of 2021. Our review looked for trends in revenue and expenditure growth, as well as one-time changes to specific line items.

In terms of recent revenues and expenditures, the Fire and EMS Fund shows a generally close balance between the two since FY2022. In fiscal 2021, the fund showed a significant surplus due to the receipt of intergovernmental revenues of nearly \$800,000. The budget for fiscal 2025 shows a projected deficit of nearly \$750,000 due primarily to the acquisition of a fire engine. The deficit is expected to reduce the fund balance from \$2.3 million at the beginning of the fiscal year to approximately \$1.6 million at the end of the year. While budgeted deficits are not usually recommended, the impact of one-time major capital outlays do not necessarily make for an unsustainable trend.

A snapshot of departmental revenues and expenditures is shown in Figure 1 below.

Figure 1. Fire/EMS Total Revenues and Expenditures

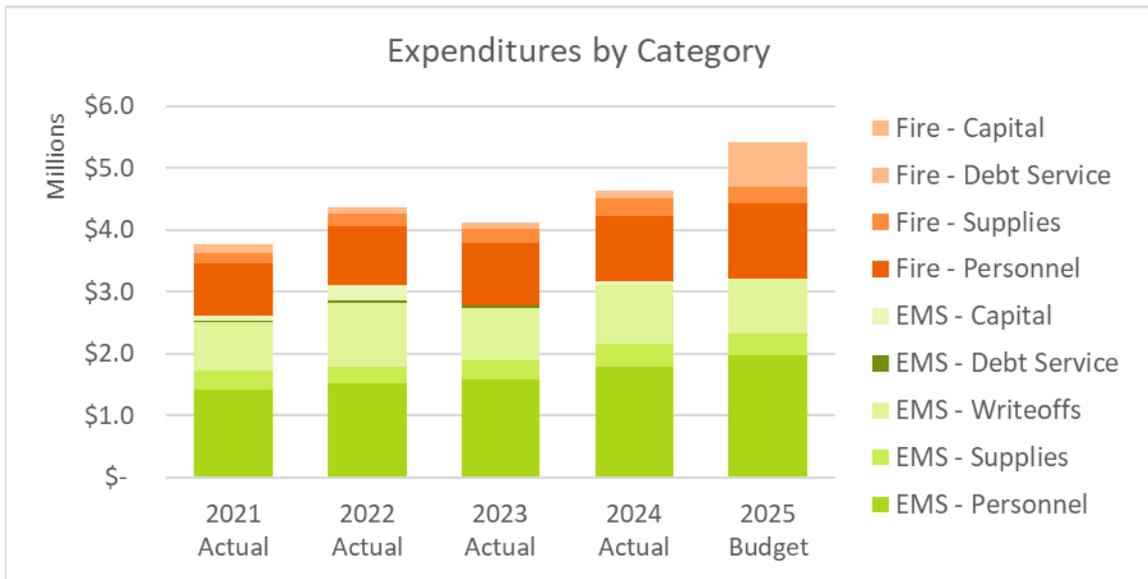


Looking specifically at the expenditure side of operations, we observe that expenses have grown in recent years, primarily due to growth in payroll expenses largely driven by the addition of new staff. Expenditure growth is expected to continue into future years primarily due to inflationary pressures rather than staffing additions, which is expected to slow the rate of growth seen in the period from fiscal 2023 to 2025.

One-time capital expenses added to EMS outlays in fiscal 2022 and to budgeted Fire outlays for fiscal 2025 as mentioned above. The Department anticipates that its next major capital outlay will be for the purchase of a ladder truck to address the growing height of structures in the area. The timing and funding mix for this potential purchase have not yet been finalized.

Figure 2 on the following page shows expenditures by component and overall spending in recent years. Total expenditures are broken into segments, with orange segments showing Fire expenditures and green segments showing expenses for EMS.

Figure 2. Fire/EMS Expenditures by Category



Turning our attention to Fire and EMS revenues, we see that total revenues have been relatively flat since fiscal 2022. At first glance, the flat revenue trend might seem a cause for concern given the increase realized on the expenditure side. However, this concern is mitigated by the fact that transfers from the General Fund have been shrinking, as less subsidy has been required to balance the Fire/EMS budget.

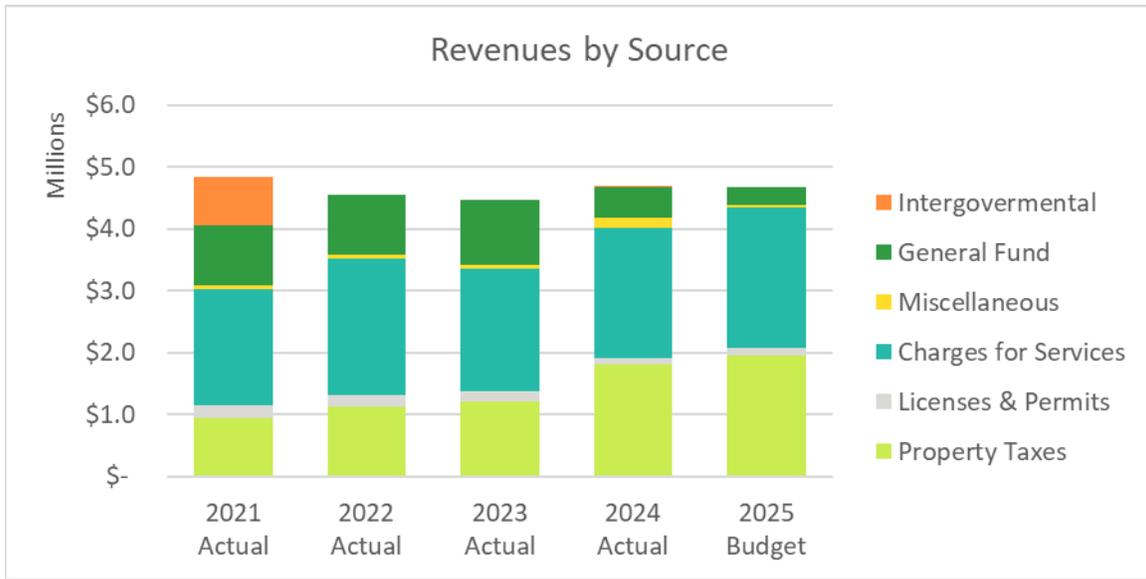
Revenues in FY2021 were unusually high due to the intergovernmental revenues described earlier. Since that time, the major development in Fire/EMS revenues was driven by the boost in property tax revenues first seen in fiscal 2024. This growth was the result of a significant increase in taxable property values in the last reassessment. Because property tax funding for Fire/EMS comes from a dedicated levy set at 24 mills, the additional property value translated into additional revenue.

Property tax revenues that were \$1.1 million in FY 2022 and \$1.2 million in FY 2023 jumped by nearly 50% in FY 2024, coming in at \$1.8 million. For the FY 2025 budget, property tax levy revenues are estimated at approximately \$1.95 million.

The additional revenue flowing in from the dedicated levy has allowed the City to reduce its transfers out of the General Fund from a level of approximately \$1.0 million annually in FY2021-2023 down to less than \$300,000 in the FY2025 budget.

Recent changes in revenues are shown in Figure 3 below.

Figure 3. Fire/EMS Revenues by Source

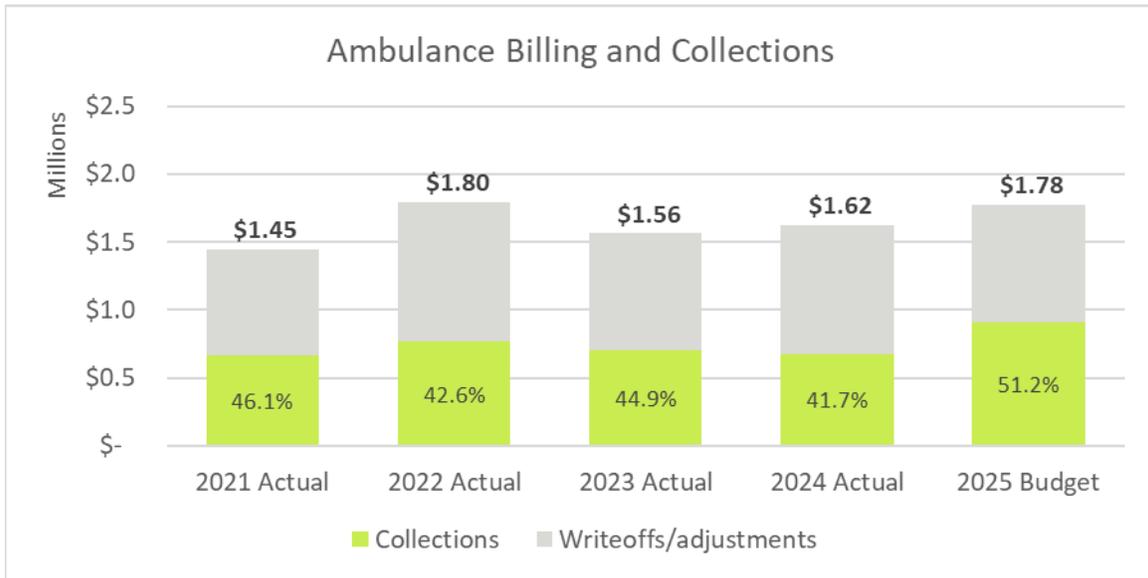


Analyzing the balance between ambulance billing on the revenue side versus related adjustments and write-offs on the expense side, we note that total billing for EMS saw a spike in fiscal 2022, jumping to \$1.8 million for the year before falling to \$1.56 million the following year, which represented a return to a level closer to the historical baseline. Total billables have continued to climb since that time and are expected to be \$1.78 million in the FY 2025 budget.

Adjustments and write-offs during these years result in collection rates that have ranged from 41.7% to 46.1%, with a jump to 51.2% expected in the current budget year. As noted in the Fire Department Master Plan published by AP Triton in November of 2021, best practices for ambulance billing suggest a collection rate of 28% to 35% as an appropriate target for setting ambulance rates.

Recent billing and collections for ambulance services are shown in Figure 4 on the following page. Labels above each column show total billing for the year, with the green segment of each column showing actual revenues collected.

Figure 4. EMS Billing and Collections



Cost of Services Analysis

To calculate the City's costs for providing Fire and EMS services, we broke the Department's operations into distinct categories. The cost components we measured consisted of:

- Personnel costs for staff time spent on an incident (direct cost)
- Budget costs for non-personnel expenses such as supplies and services (direct cost)
- Costs of capital, calculated based on a regular replacement schedule for major apparatus and capital equipment (indirect cost)
- Availability costs, based on the ratio of staff time spent on incident responses as compared to total time on shift. (indirect cost)

A summary of cost calculations for EMS and Fire services follows.

Emergency Medical Services

The FY 2025 budget for EMS includes approximately \$2.0 million for employee wages and benefits and \$368,000 for services and supplies. Relative to personnel costs, we calculated an hourly cost for Firefighter/Medic staff based on current wage and benefit information. The hourly cost was further adjusted to take into account the annual hours for Kelly days, vacation time, training and other time off. Taking each element into account, we arrived at an estimated hourly cost of \$56.32 for each ambulance staff.

Looking at capital outlays, we moved away from the Department's budgeted capital expenditures, which show a great deal of variability year-over-year depending on the timing of major capital expenditures. To eliminate these cost spikes, we looked at the Department's vehicles and equipment needs and developed a capital equipment replacement schedule which calculated the annualized costs required to fund vehicle and equipment replacement on a regular schedule.

For EMS, this included a fleet of three ambulances, each with a useful life of 12 years. Starting with current costs and the expected inflation in replacement vehicle costs, we estimate that approximately \$78,000 would be required this year to provide funding for future ambulance replacements. To this amount we added \$20,000 for capital medical equipment such as cardiac monitors. (If the capital replacement charge were to be treated as a regular budget expense, this amount would need to increase with inflation each year in order to provide sufficient funding for future capital outlays).

For the \$368,000 in supplies and services and the \$78,000 for capital replacement, we divide the costs by the number of ambulance calls per year. Based on recent trends in the City's ambulance incident reports, we anticipate approximately 1,550 calls for service on the EMS side in the coming year.

The final component of our cost calculation captures the availability costs related to keeping staff on duty 24 hours a day in readiness for incidents to occur. Utilization of Fire and EMS resources has averaged approximately 20% in recent years, meaning that for every hour spent on calls for service, approximately four hours are spent standing by. By this measure, the hourly rate for ambulance staff would be increased by a factor of four to reflect availability costs.

Because the City collects its dedicated mill levy for Fire/EMS staffing, the availability costs are partially covered by these revenues. The \$1.95 million budgeted for collection in FY 2025 is sufficient to cover operating costs in the Fire Division as well as approximately half the personnel costs on the EMS side. For this reason, we remove half the availability cost component for Whitefish residents to reflect their property tax contributions. For non-residential fees, the availability costs are left unadjusted.

Combining each of these cost components, we arrive at a total cost of \$625.61 per ambulance run, as outlined in Table 1 below.

Table 1. Ambulance Cost Calculation (Resident)

Cost Component	Cost	Description
Personnel costs:	\$ 112.64	2 staff for 1 hour @ \$56.32
Supplies and services:	\$ 237.36	\$367,915 divided by 1,550 calls
Capital costs:	\$ 50.32	\$78,000 divided by 1,550 calls
Availability costs:	\$ 450.56	20%/80% ratio of response to standby
Adj. for levy contribution:	\$ (225.28)	50% of standby covered by mill levy
Total cost:	\$ 625.61	Total cost per ambulance call

Because the City of Whitefish does not expect to collect 100% of its ambulance billing, we recommend that it choose a fee amount that is more likely to bring in the required revenues for the Department. Collection rates in recent years have ranged from 41.7% to 46.1%. As the billing amount rises, this rate will expectedly drop. If we assume that collection rates fall to 35%, the required fee amount for an ambulance transport would be \$1,787.

The calculation above includes the higher wage for employees with advanced training. If we reduce the personnel and standby components by 10% to reflect the wage difference, the total cost for a BLS transport would be \$591.82, and the recommended fee amount would be \$1,691.

Table 2. Ambulance Cost Calculation (Non-resident)

Cost Component	Cost	Description
Personnel costs:	\$ 112.64	2 staff for 1 hour @ \$56.32
Supplies and services:	\$ 237.36	\$367,915 divided by 1,550 calls
Capital costs:	\$ 50.32	\$78,000 divided by 1,550 calls
Availability costs:	\$ 450.56	20%/80% ratio of response to standby
Total cost:	\$ 850.89	Total cost per ambulance call

For non-residents, the unadjusted availability cost results in a total cost of \$850.89. Assuming an effective collection rate of 35%, the fee amount for BLS ambulance transport of a non-resident would be \$2,431. For a BLS transport with a 10% lower personnel cost, the non-resident fee would be \$2,270.

Table 3. Ambulance Cost Calculation (Treatment, no transport)

Cost Component	Cost	Description
Personnel costs:	\$ 28.16	2 staff for 15 minutes @ \$50.69
Supplies and services:	\$ 118.68	half the burden of transport
Capital costs:	\$ 25.16	half the burden of transport
Availability costs:	\$ 112.64	20%/80% ratio of response to standby
Adj. for levy contribution:	\$ (56.32)	50% covered by mill levy
Total cost:	\$ 228.32	Total cost per ambulance call

In recent years, Whitefish has experienced 200-250 EMS calls per year which result in medical evaluation without patient transport. If we assume that these calls require a quarter of the staff time and half the effort of calls where patients are transported to a medical facility, the total cost to the City for these calls comes to \$228.32. At a 35% billing rate, this equates to a fee of \$652.35. For non-residents, the full cost is \$284.64, resulting in a fee of \$813.

Fire Department

For the Fire cost calculations, we follow the same methodology as for EMS, using budgeted costs and estimated incident numbers for Fire apparatus responses.

The FY 2025 budget for Fire includes approximately \$1.2 million for employee wages and benefits and \$264,500 for services and supplies. Because personnel are shared between the two divisions, the cost per hour for personnel is the same as that calculated for EMS. Also, because the utilization ratio takes into account Fire responses as well as EMS calls, the calculation for availability costs is also the same between the Fire and EMS divisions. As noted earlier, the City’s 24-mill levy dedicated to Fire/EMS service is sufficient to cover personnel costs for the Fire division, so the resident fee calculations will cancel out the availability cost component entirely.

For capital replacement of Fire Division apparatus and equipment, we calculated replacement costs for three engines with a service life of 24 years (for an 8-year purchase cycle). We also included three command vehicles with a service life of 15 years (a 5-year replacement cycle with vehicles moving to Public Works after 10 years), along with two brush trucks with a 20-year life. Finally, we calculated costs for a tender, a rescue truck, and a boat, each with a 20-year service life. The combination of these replacement costs along with approximately \$40,000 in equipment replacement (for items like radios, SCBA gear, etc.) gives us an annual capital replacement charge of \$128,000.

For supplies and services and capital replacement, we divide the costs by the number of fire apparatus responses per year. Based on recent trends in the City’s fire incident reports, we anticipate approximately 1,075 calls for service on the fire side in the coming year.

As an example of a limited fire department response, we examine a motor vehicle accident where a fire crew arrives on-scene and provides medical evaluation and treatment similar to the EMS treat/no transport scenario described earlier. Using the Fire Division's cost components, we arrive at a total cost of \$393.33 per response, as outlined below in Table 4.

Table 4. Fire Cost Calculation (Treatment, no transport)

Cost Component	Cost	Description
Personnel costs:	\$ 28.16	2 staff for 15 minutes @ \$56.32
Supplies and services:	\$ 246.10	\$264,555 divided by 1,075 calls
Capital costs:	\$ 119.07	\$128,000 divided by 1,075 calls
Availability costs:	\$ 112.64	20%/80% ratio of response to standby
Adj. for levy revenue:	\$ (112.64)	100% of standby covered by mill levy
Total cost:	\$ 393.33	Total cost per fire response

As before, we assume that collections will fall short of billing (should the City decide to pursue billing for Fire responses). If we assume that collection rates will be consistent with EMS charges at 35%, the required fee for a Fire unit response would be \$1,124. For non-resident calls, the removal of the availability adjustment results in a cost to the City of \$505.97, which translates to a fee amount of \$1,446.

Another common fire incident involves a natural gas line being cut accidentally by a contractor moving earth. The response from the Fire Department in this example would include two vehicles with a total crew complement of five, who would remain on-site for approximately two hours. The calculated costs related to this example come to a total of \$1,293.53, as shown below in Table 5.

Table 5. Fire Cost Calculation (Gas line cut)

Cost Component	Cost	Description
Personnel costs:	\$ 563.20	5 staff for 2 hours @ \$56.32
Supplies and services:	\$ 492.20	Cost for 2 apparatus responses
Capital costs:	\$ 238.14	Cost for 2 apparatus responses
Availability costs:	\$ 2,252.80	20%/80% ratio of response to standby
Adj. for levy revenue:	\$ (2,252.80)	100% of standby covered by mill levy
Total cost:	\$ 1,293.53	Total cost per fire response

We do not have a basis for estimating the City's collection rate on this potential fee type. Using a conservative estimate of a 75% collection rate, the required fee amount for this response type would come to \$1,725. For incidents caused by non-residents, the removal of the credit for standby costs would bring the response cost to \$3,546.33, with an associated fee of \$4,728.

The calculations above are based on two specific fire responses with limited numbers of personnel and apparatus involved. For structural fires or major accidents where larger crews and more equipment are required, the City's costs would go up accordingly.

Benchmark Comparisons

To provide context for the ambulance fees currently and potentially charged by the City of Whitefish, Baker Tilly surveyed an array of comparable communities providing ambulance services to gather information about fees charged around the region. Communities and providers who participated in our data collection include:

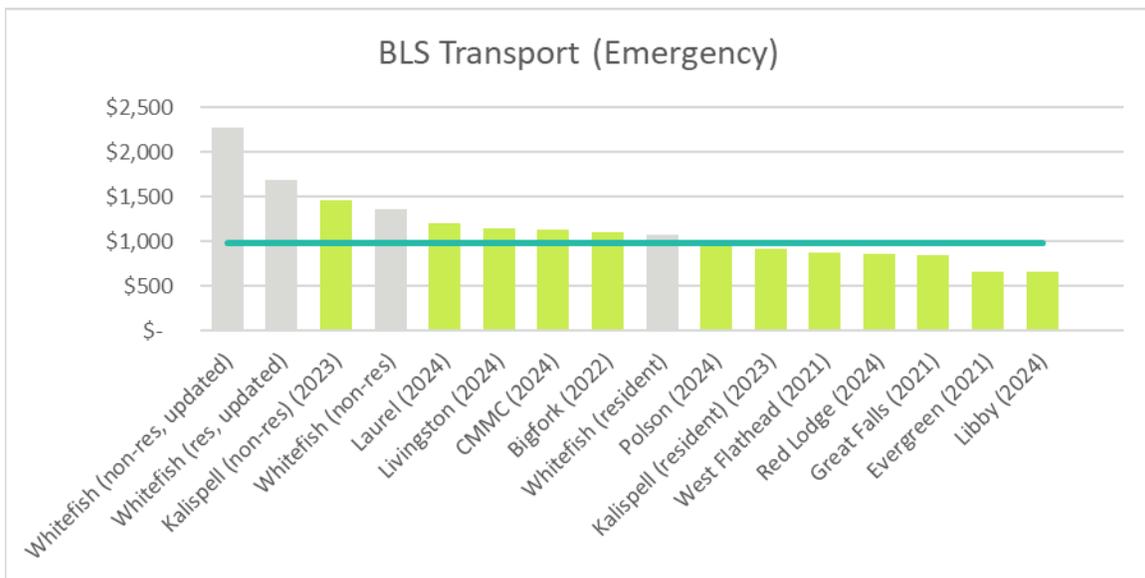
- City of Red Lodge
- Central Montana Medical Center (Lewistown)
- City of Kalispell
- City of Great Falls
- City of Polson
- City of Livingston
- City of Laurel
- Bigfork Fire District
- City of Libby
- Evergreen
- West Flathead

Baker Tilly also reached out to the City of Columbia Falls and the Central Valley Fire District (Belgrade) for data, but was unable to retrieve the requested information. Data provided by the City of Kalispell was dated from 2016; we have been unable to determine if the City has updated its rates since that time. The City of Kalispell also indicated that it charged different rates for residents and non-residents for several services.

EMS Charges

The bulk of our data collection was centered on charges for ambulance transports, including both BLS and ALS levels. Comparisons of the fee data collected for these services is shown on the following pages.

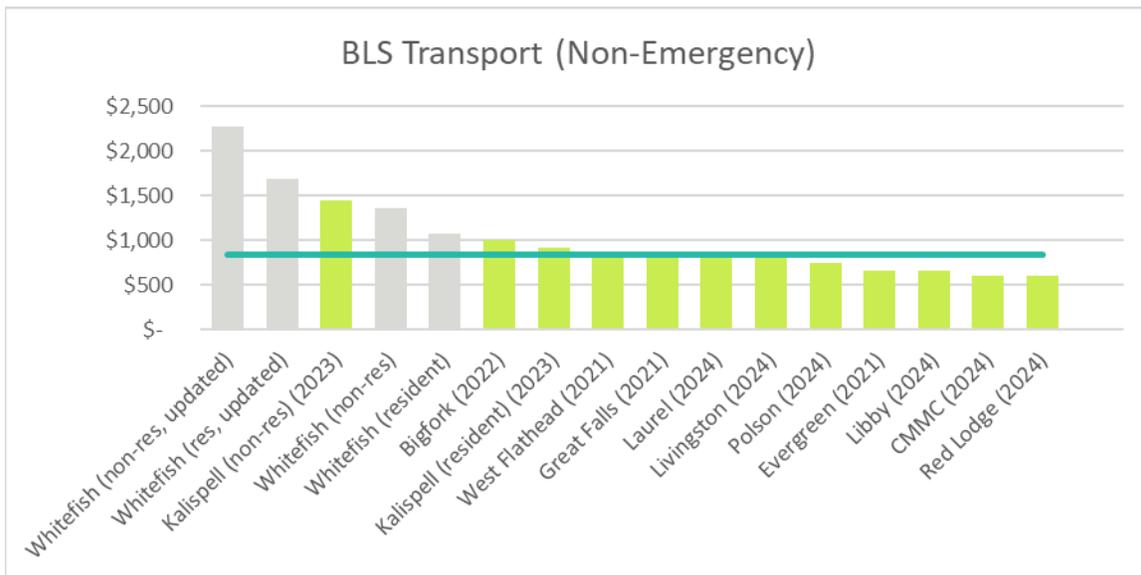
Figure 5. BLS Transport Fees (Emergency)



Respondent	Fee	Respondent	Fee
Bigfork	\$ 1,100	Laurel	\$ 1,200
CMMC	\$ 1,126	Libby	\$ 660
Evergreen	\$ 660	Livingston	\$ 1,150
Great Falls	\$ 850	Polson	\$ 975
Kalispell (non-res)	\$ 1,451	Red Lodge	\$ 853
Kalispell (resident)	\$ 914	West Flathead	\$ 875
		Group Average	\$ 984

Fees for emergency BLS transport ranged from \$660 to \$1,450. The average fee from the benchmark group was \$984. Fees currently charged to Whitefish residents are in the middle of the benchmark group, while non-resident fees are near the top of the benchmark range. Proposed fees would put Whitefish at the top of the benchmark group.

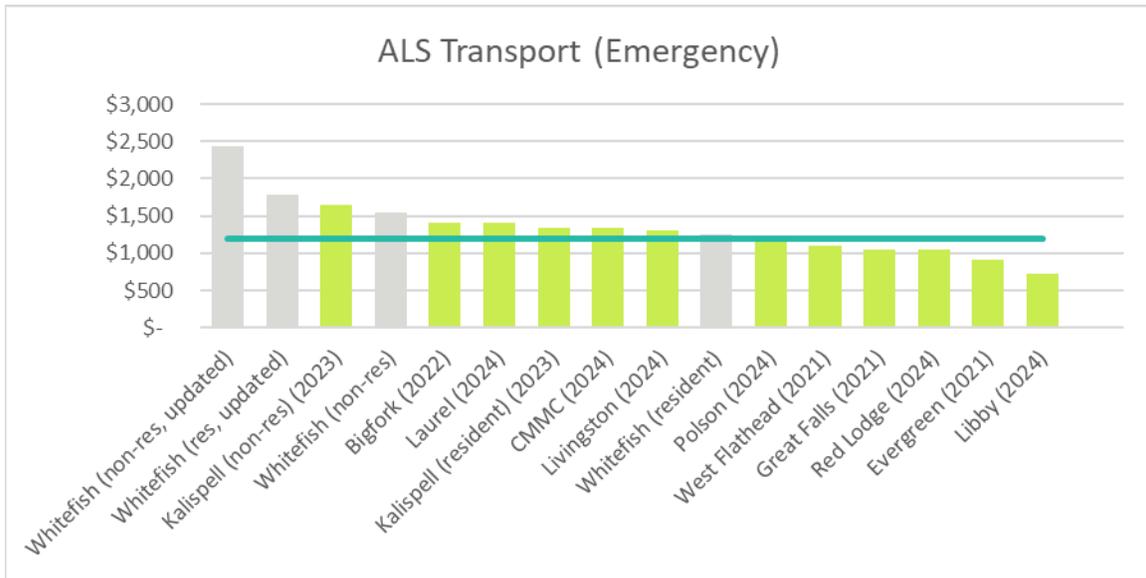
Figure 6. BLS Transport Fees (Non-emergency)



Respondent	Fee	Respondent	Fee
Bigfork	\$ 1,000	Laurel	\$ 850
CMMC	\$ 610	Libby	\$ 660
Evergreen	\$ 660	Livingston	\$ 800
Great Falls	\$ 850	Polson	\$ 750
Kalispell (non-res)	\$ 1,451	Red Lodge	\$ 606
Kalispell (resident)	\$ 914	West Flathead	\$ 875
		Group Average	\$ 835

For non-emergency BLS transport, fees ranged from \$606 to \$1,451. The average fee charged for non-emergency service was \$835.

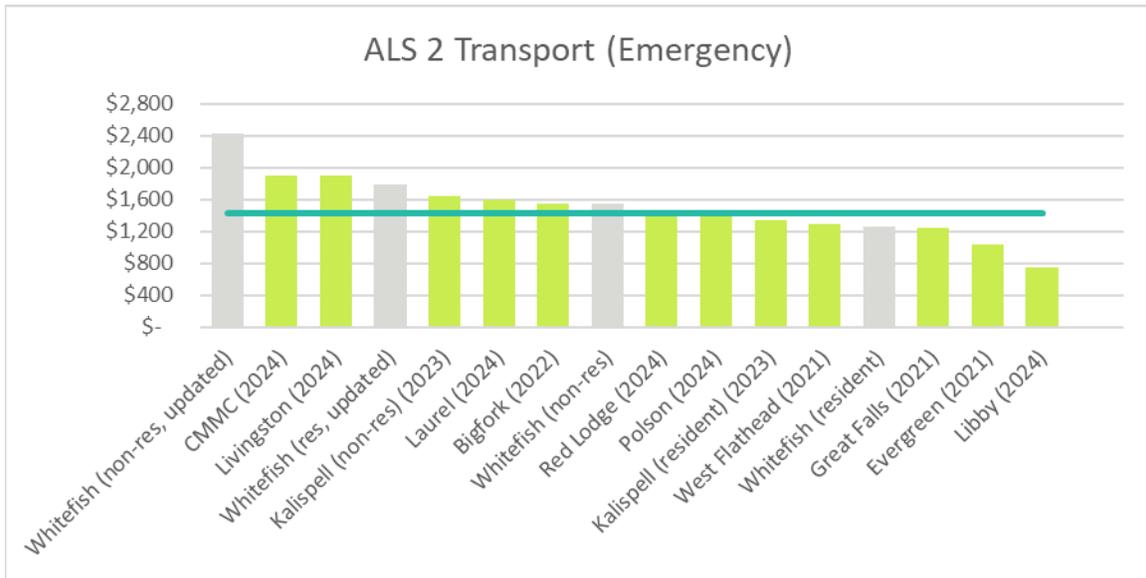
Figure 7. ALS Transport Fees (Emergency)



Respondent	Fee	Respondent	Fee
Bigfork	\$ 1,400	Laurel	\$ 1,400
CMMC	\$ 1,337	Libby	\$ 725
Evergreen	\$ 910	Livingston	\$ 1,300
Great Falls	\$ 1,050	Polson	\$ 1,150
Kalispell (non-res)	\$ 1,650	Red Lodge	\$ 1,043
Kalispell (resident)	\$ 1,338	West Flathead	\$ 1,100
		Group Average	\$ 1,200

Fees for emergency ALS transport ranged from \$725 to \$1,650. The average fee from the benchmark group was \$1,200. Fees currently charged to Whitefish residents are consistent with the benchmark group, while non-resident fees are near the top of the benchmark range. Proposed fees would put Whitefish at the top of the benchmark group.

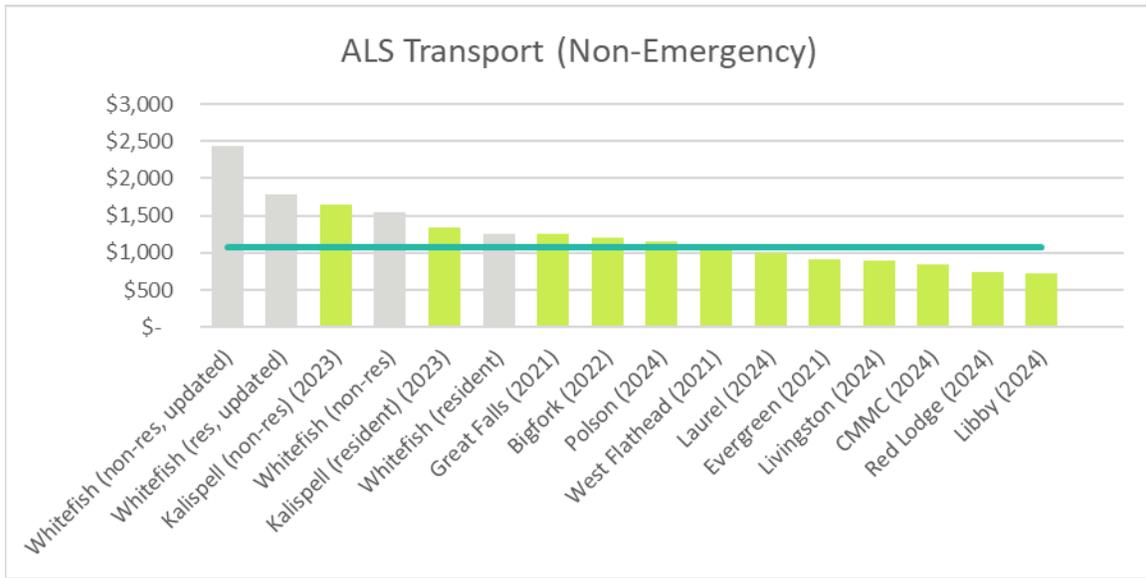
Figure 8. ALS 2 Transport Fees (Emergency)



Respondent	Fee	Respondent	Fee
Bigfork	\$ 1,550	Laurel	\$ 1,600
CMMC	\$ 1,902	Libby	\$ 750
Evergreen	\$ 1,040	Livingston	\$ 1,900
Great Falls	\$ 1,250	Polson	\$ 1,450
Kalispell (non-res)	\$ 1,650	Red Lodge	\$ 1,466
Kalispell (resident)	\$ 1,338	West Flathead	\$ 1,300
		Group Average	\$ 1,433

Fees for ALS Level 2 transport ranged from \$750 to \$1,900. The average fee from the benchmark group was \$1,433.

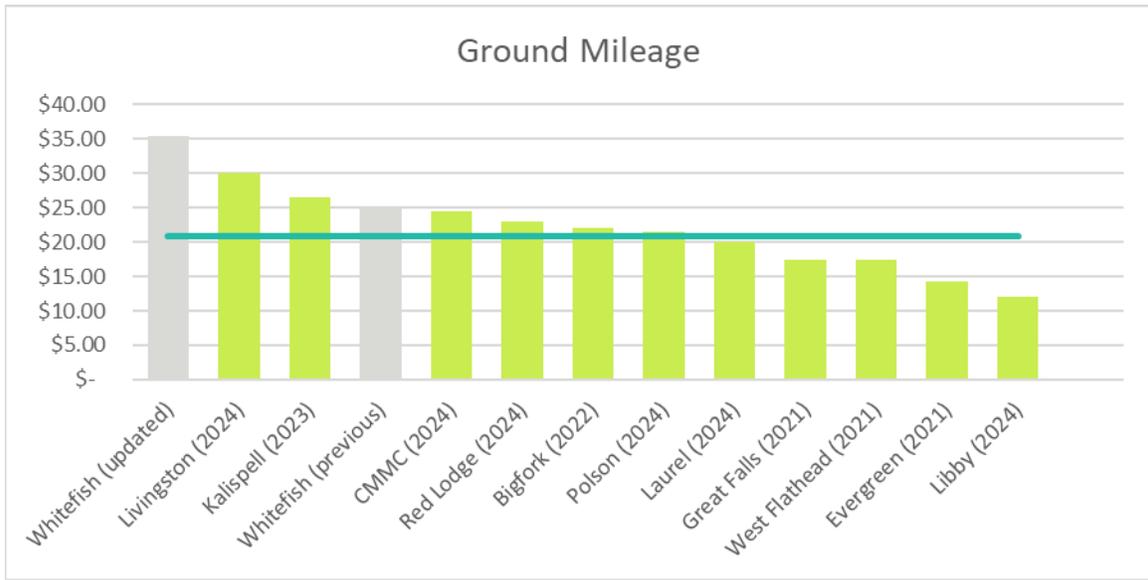
Figure 9. ALS Transport Fees (Non-emergency)



Respondent	Fee	Respondent	Fee
Bigfork	\$ 1,200	Laurel	\$ 1,000
CMMC	\$ 841	Libby	\$ 725
Evergreen	\$ 910	Livingston	\$ 900
Great Falls	\$ 1,250	Polson	\$ 1,150
Kalispell (non-res)	\$ 1,650	Red Lodge	\$ 734
Kalispell (resident)	\$ 1,338	West Flathead	\$ 1,100
		Group Average	\$ 1,066

For non-emergency ALS transport, fees ranged from \$725 to \$1,650. The average fee charged for non-emergency service was \$1,066.

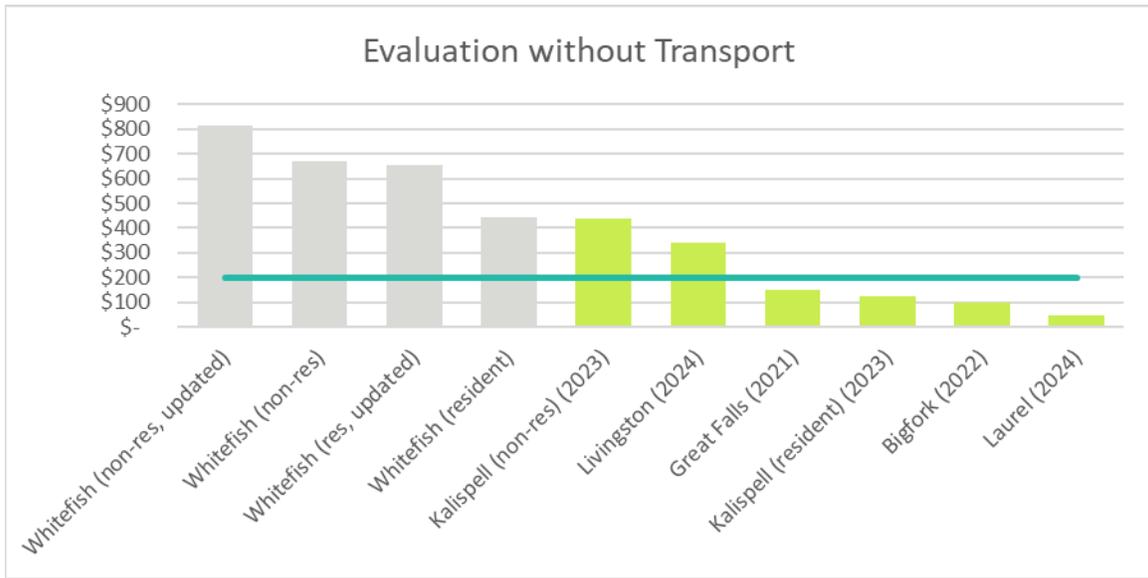
Figure 10. Mileage Costs



Respondent	Fee	Respondent	Fee
Bigfork	\$ 22.00	Libby	\$ 12.00
CMMC	\$ 24.56	Livingston	\$ 30.00
Evergreen	\$ 14.30	Polson	\$ 21.50
Great Falls	\$ 17.50	Red Lodge	\$ 22.98
Kalispell	\$ 26.51	West Flathead	\$ 17.50
Laurel	\$ 20.00	Group Average	\$ 20.80

Loaded per-mile fees for transport ranged from \$12.00 to \$30.00, with an average value of \$20.80 per mile.

Figure 11. Evaluation without Transport



Respondent	Fee	Respondent	Fee
Bigfork	\$ 100	Great Falls	\$ 150
Kalispell (non-res)	\$ 438	Laurel	\$ 50
Kalispell (resident)	\$ 126	Livingston	\$ 340
		Group Average	\$ 201

Five members of the benchmark group reported fees charged when medical evaluation is provided on-scene without medical transport being provided. These are typically patients who are treated and released or transferred to law enforcement or another EMS crew for transport. Fees for this service ranged from \$50 to \$438, with an average fee of \$201.

Published charges for supplies used during BLS transport range from \$31 to \$300. For ALS runs, charges for supplies ran from \$44 to \$300. Several members of the benchmark group do not have set fees for routine supplies, noting that supplies are charged at actual cost, with some charging a handling fee of 10% to 15%.

Other common fees for supplies included oxygen at \$55 to \$96 and defibrillator supplies ranging from \$84 to \$240. Three jurisdictions listed fees for out-of-district responses, ranging from \$150 to \$375. Three other benchmark participants charged for additional ambulance staff at rates of \$50 to \$100 per hour.

Fire Department Charges

Benchmark data for fire response proved sparse and difficult to collect. Most of the data provided by benchmark communities was focused on fees for fire-related plan reviews and property inspections, as opposed to emergency calls for structural fires or motor vehicle accidents.

The City of Laurel charges for on-scene fire response, listing charges of \$250 per hour for assistance and investigation, \$1,500 for minor calls, and \$2,000 for fire, rescue, and hazmat response. The City of Laurel also charges hourly fees for apparatus time on scene, ranging from \$225 per hour for command vehicles and tenders up to \$500 per hour for engines.

Great Falls also listed fees for time spent on scene. Hourly charges ranged from \$120 for command and rescue units up to \$335 for an aerial truck. Fees for fire personnel were listed as being charged based on actual wages and benefit costs of staff on scene.

The City of Belgrade listed a \$319 fee for Fire Department responses to motor vehicle collisions. If the response included technical rescue, the listed fee was \$669. Belgrade indicated that regular fire responses were not charged for incidents inside the district unless calls were found to be excessive or abusive, in which case staff time would be charged at actual wages and benefits and equipment charges would be based on the FEMA schedule.

Bigfork listed a \$150 fee for Fire Department responses to motor vehicle collisions. If the response included fire suppression or rescue services, the listed fee was \$750

A few jurisdictions reported charging fees for false alarm calls. Great Falls allows two false alarms before it charges \$100 for subsequent calls. Bigfork allows three false alarm calls before it starts charging \$250 for the fourth. The City of Laurel charges much steeper fines for false alarms, starting at \$400 for the second call, \$800 for the third, and \$1,000 for subsequent false alarm calls.

Recommendations

Updates to Existing Fire/EMS Fees

Per the calculations in the cost of service section of this report, we recommend that the City of Whitefish consider increasing its resident fees for ALS and BLS transport to \$1,787 and \$1,691 respectively. For non-residents, fees would be \$2,431 for ALS transport and \$2,270 for BLS. These fee levels would put Whitefish above its benchmark peers, with the understanding that significant fee adjustments would be common.

For ambulance miles, we recommend that the rate be increased from the current level of \$24.90 to \$35.36 per mile, commensurate with the increase in residential transport fees.

For calls which include patient evaluation without transport to a facility, we recommend the City raise its fees to \$652 for residents and \$813 for non-residents.

Because many insurers provide reimbursement for supplies only to the extent that these expenses are detailed in an itemized bill, we recommend that the City track the supplies used during a response and submit itemized costs for these supplies as part of its ambulance billing process. The fees recommended above are intended to cover response, treatment and/or transportation costs exclusive of supplies.

Table 6. Current and Recommended Fees

Fee Description	Current Fee	Recommended Fee	Percent Change
ALS transport, resident	\$ 1,257	\$ 1,787	42%
ALS transport, non-resident	\$ 1,549	\$ 2,431	57%
BLS transport, resident	\$ 1,070	\$ 1,691	58%
BLS transport, non-resident	\$ 1,363	\$ 2,270	67%
Mileage	\$ 24.90	\$ 35.36	42%
Treatment without transport, resident	\$ 441	\$ 652	48%
Treatment without transport, non-resident	\$ 671	\$ 813	21%

Potential New Fire/EMS Fees

The City indicated that it receives a substantial number of calls each year for gas line ruptures caused by operators of earth-moving equipment. Given the time and resources involved in responding to these calls, we recommend that the City consider implementation of a fee to help recover these costs.

Similarly, there are occasions when Fire/EMS staff arrive on scene for a Fire call and provide medical evaluation and/or treatment separate from an EMS unit. The City may wish to implement a fee for this service, using calculations similar to the EMS “treat and release” service fee described above.

The cost calculations and recommended fee levels for each of these fees are outlined earlier in this report. If the City chooses to pursue these new fee types, we encourage it to use these calculations to determine total fee amounts, making adjustments to our calculations as appropriate to align with the City’s policy preferences.

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City of Whitefish Fire Department

275 Flathead Avenue – PO Box 158 – Whitefish, Montana 59937

406-863-2483 Fax: 406-863-2499 chadley@cityofwhitefish.org

To: Mayor Muhlfeld and City Council

From: Chief Cole Hadley

Subject: Recommendation for Selection of CWPP Consultant

January 5, 2026

INTRODUCTION

The City of Whitefish issued a Request for Proposals (RFP) on October 22, 2025, seeking a qualified consultant to complete the Community Wildfire Protection Plan (CWPP) update. The CWPP will guide the City's wildfire risk reduction efforts and support compliance with the Montana Land Use Planning Act. The consultant selection process followed the Rating Panel and Selection Panel structure previously approved by Council.

SELECTION PROCESS

Rating Panel Review

The Rating Panel—Fire Chief, Deputy Fire Chief, and City Manager—reviewed all submitted proposals. Finalists were identified based on experience, approach to wildfire planning, and ability to meet the project timeline.

Selection Panel Interviews

The Selection Panel—Fire Chief, Deputy Fire Chief, City Manager, and Councilor Sweeney conducted structured interviews with the top-ranked firms. Evaluation criteria focused on technical expertise, familiarity with CWPP development, and overall fit with Whitefish's needs.

The City of Whitefish received RFPs from eight (8) consulting firms and through the review process five (5) were selected for interviews.

- DJ&A
- SWCA
- Bintel Inc.
- MC Fire
- Choleta

Following the interviews, the Selection Panel reached consensus that the most qualified firm was SWCA Environmental Consultants.

FINANCIAL IMPACT

The City's FY26 Adopted Budget appropriates \$100,000 for updates to the Community Wildfire Protection Plan (CWPP). The budget anticipates use of ProHousing Grant funds awarded to the State of Montana in partnership with the Montana League of Cities and Towns to support community compliance with the Montana Land Use Planning Act (MLUPA). The proposed budget from SWCA Environmental Consultants for development and implementation of the CWPP is \$87,364.73, which is within the amount appropriated. An estimated project completion timeline will be finalized as part of the contract scope.

RECOMMENDATION

Staff recommends that The City Council select SWCA Environmental Consultants to complete the Community Wildfire Protection Plan and authorize staff to finalize a professional services agreement consistent with the RFP.

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RESOLUTION NO. 26-___

A Resolution of the City Council of the City of Whitefish, Montana, authorizing the submittal of an MCEP Infrastructure Planning Grant Application

WHEREAS, the City of Whitefish is applying to the Montana Department of Commerce for financial assistance from the Montana Coal Endowment Program (MCEP) to draft a Preliminary Engineering Report to address sanitary sewer inflow and infiltration; and

WHEREAS, the City of Whitefish agrees to comply with all State laws and regulations, the requirements described in the MCEP Administrative Guidelines & Application for Infrastructure Planning Grants, and those requirements that will be described in the MCEP Project Administration Manual; and

WHEREAS, the City of Whitefish commits to provide the amount of matching funds as proposed in the MCEP application; and

WHEREAS, the City of Whitefish commits to provide any funding from other grant sources listed in the application budget if not awarded by those identified grant sources.

BE IT RESOLVED by the City Council of the City of Whitefish, Montana, as follows:

Section 1: That John M. Muhlfield, Mayor, is authorized to submit this application to the Montana Department of Commerce, on behalf of City of Whitefish, to act on its behalf and to provide such additional information as may be required.

Section 2: This Resolution will take effect immediately upon its adoption by the City Council, and signing by the Mayor thereof.

PASSED AND ADOPTED BY THE CITY COUNCIL OF THE CITY OF WHITEFISH, MONTANA, ON THIS _____ DAY OF _____, 2026.

John M. Muhlfield, Mayor

ATTEST:

Michelle Howke, City Clerk



City of Whitefish
Department of Public Works
418 E. 2nd Street | PO Box 158
Whitefish, MT 59937
(406) 863-2460 | Fax (406) 863-2419

December 29, 2025

Mayor Muhlfeld and City Councilors
City of Whitefish
Whitefish, Montana

Mayor Muhlfeld and Councilors

**Resolution Committing Funding for a
PER Focusing on I/I Reduction**

Introduction/History

The City of Whitefish has complex wastewater collection system including 60 miles of sewer main and 16 lift stations. Portions of the system are over 100 years old. With the wide array of groundwater and surface water sources throughout the service area, the system experiences large increases of clear water flows. This extraneous flow, termed infiltration and inflow, or I&I, can overload the capacity of the collector pipes and reduce the treatment capabilities of the wastewater treatment facilities.

We experience an estimated 80 MG of clear water I&I per year. System components, including old gravity collection pipes, failing services, and illegal sump pump connections, coupled with precipitation, snowmelt, and high groundwater, result in I&I impacts that amount to over half of the WWTP influent flow during certain times of the year.

Current Report

The City has been notified by DEQ that a Preliminary Engineering Report specific to I&I reduction will be required. The proposed PER must identify needed improvements to the City's collection system to address I&I. The final report will represent the highest priority and best long-term activity to protect the public's health and safety, while ensuring Whitefish can continue to flourish economically.

In order to move forward with the PER, the City has hired HDR to assist with an application for a planning grant through the Montana Coal Endowment Program (MCEP).



Financial Requirement

The estimated total cost of PER is \$80,000. The proposed funding plan is as follows:

MCEP Grant	\$30,000
<u>Local Commitment</u>	<u>\$50,000</u>
TOTAL	\$80,000

Local funds are included in the approved FY26 budget.

Recommendation

In order to meet the conditions required by MCEP, it is the recommendation of the Public Works Department that council adopt the enclosed resolution committing local funds of \$50,000 for the Preliminary Engineering Report.

Sincerely,

A handwritten signature in black ink, appearing to read "Craig Workman".

Craig Workman, P.E.
Public Works Director

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Staff Report

To: Mayor Muhlfeld and City Councilors

From: Finance Director, Lanie Gospodarek

Date: November 12, 2025

Re: Annual Impact Fee Report to The City Council



Introduction/History

According to Section 10-2-7(c) of the City Code on Impact Fees, the Finance Director shall provide an annual report to the Council on the impact fee funds showing the source and amount of all monies collected, earned, or received, the public improvements that were financed in whole or in part by impact fees, and any administrative expenses incurred by the impact fee funds. Following is the annual report for Fiscal Year Ended June 30, 2025, based on unaudited figures due to the timing of the City's annual financial audit.

In the fall of 2022 the Impact Fee Advisory Committee, through the RFP process, recommended TischlerBise to the City Council to provide an updated impact fee study to more accurately reflect the current growth and expansion needs of the City. TischlerBise worked with staff to gather data and to provide alternative and precise methods for calculating impact fees. The Impact Fee Study was completed in September 2023 and adopted by the City Council after holding public hearings on October 16, 2023, with an effective date of January 1, 2024. As a result, some of the impact fees have been changed or eliminated and a fund has been created for each individual impact fee rather than being reported separately within the same fund. Revenues for each impact fee within Fund 2399 ceased as of January 1, 2024.

Below data for both the Impact Fee fund and the new individual Impact Fee funds are provided.

Current Report for Impact Fee Fund 2399

Impact Fee Cash Balance

The following table details the cash balance for each type of impact fee within this fund (2399) as of June 30, 2024, and June 30, 2025, and the corresponding dollar amount change from the prior year:

Impact Fee Description	Cash Balance 6/30/24	Cash Balance 6/30/25	Dollar Change
Paved Trails	\$45,694	\$47,460	\$1,767
Park Maintenance Bldg.	\$75,621	\$78,490	\$2,869
Emergency Services Ctr.	\$544,271	\$503,984	(\$40,287)
City Hall	\$116,720	\$121,145	\$4,425
Stormwater	\$268,361	\$277,294	\$8,933
Water	\$2,383,673	\$2,486,353	\$102,680
Wastewater	\$2,042,183	\$2,099,718	\$57,535
Total	\$5,476,523	\$5,614,444	\$137,922

Cash reserves increased by \$137,922 from FY24 to FY25. As depicted above, most impact fee categories within the former Impact Fee fund increased cash reserves due to interest earned. The Emergency Services Center (ESC) account decreased as an appropriate expansion project utilized these funds. While increasing cash reserves is appropriate when projects are planned within a reasonable timeframe, it is generally accepted that the revenue generated from impact fees be spent within five to ten years. This generally accepted practice is based on developers paying impact fees to help fund capital improvements related directly to their development’s increased demand on public facilities. Therefore, it is important to identify projects that expand capacity in a reasonable time after receipt of the impact fee payments in accordance with the Service Area Report prepared by TischlerBise. The City’s Capital Improvements Program (CIP) also accomplishes this by including impact fees as a source of funding for eligible projects during the next five years. The recent Service Area Report update expands the capital plans for impact fee-related projects to ten years.

Water and Wastewater impact fees were appropriated for eligible projects in the FY25 budget. Most notable were the South Water Storage & Production Project in the Water Impact Fee Fund; upgrading the collections mains in the Wastewater Impact Fee Fund; and the Monegan Stormwater Collection Improvements in the Stormwater Fund.

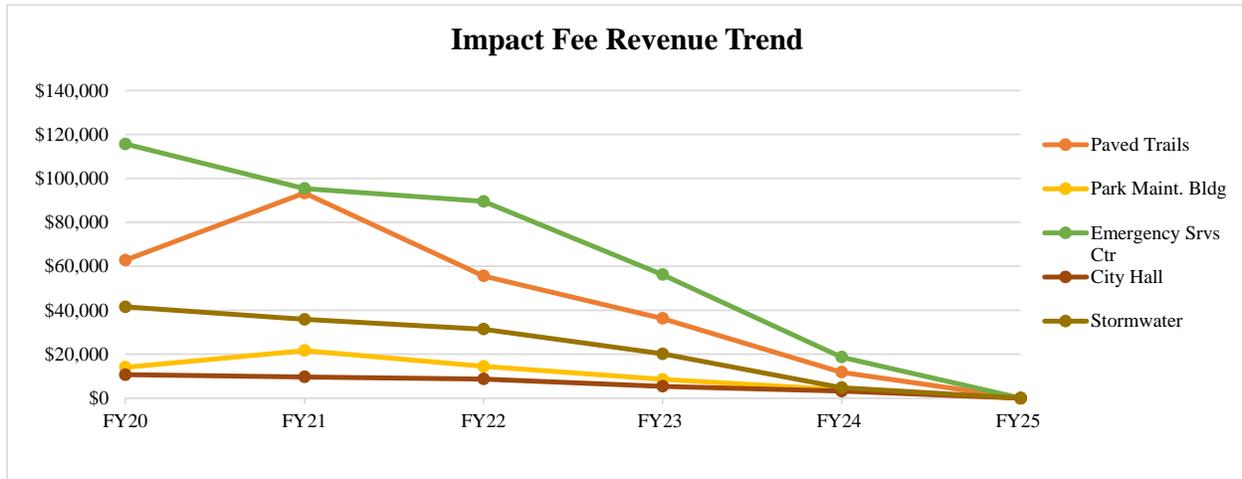
Impact Fee Revenue

Under the current methodology all impact fees, except water and wastewater, are collected from new construction and additions. Impact fees for residential projects are based on the number of dwelling units added and then square footage determines the rate. Impact fees on commercial projects are determined by type and square footage. Water and wastewater impact fees are collected from new connections to the system based on the service line and meter size. Additions are only subject to water and wastewater impact fees if a larger meter size is required for adequate service.

The following table details the revenue and interest earned for those impact fees accounted for in the Impact Fee Fund (2399). It should be noted that earnings from FY25 forward will be interest only.

Impact Fee Description	FY08-FY19	FY20	FY21	FY 22	FY23	FY24	FY 25	Total Revenue
Paved Trails	\$ 413,854	\$ 62,794	\$ 93,305	\$ 55,649	\$ 36,292	\$ 11,805		\$ 673,699
Park Maint. Bldg	\$ 31,464	\$ 14,103	\$ 21,681	\$ 14,519	\$ 8,545	\$ 3,813		\$ 94,125
Emergency Srvs Ctr.	\$ 977,329	\$ 115,635	\$ 95,413	\$ 89,520	\$ 56,236	\$ 18,711		\$ 1,352,844
City Hall	\$ 902,314	\$ 10,697	\$ 9,713	\$ 8,764	\$ 5,396	\$ 3,222		\$ 940,107
Stormwater	\$ 246,066	\$ 41,571	\$ 35,854	\$ 31,403	\$ 20,220	\$ 4,803		\$ 379,917
Total	\$2,571,027	\$ 244,800	\$ 255,966	\$ 199,855	\$ 126,690	\$ 42,354		\$3,440,692
<i>Interest - Fund Total</i>	<i>\$ 31,425</i>	<i>\$ 7,358</i>	<i>\$ 3,723</i>	<i>\$ 3,699</i>	<i>\$ 17,648</i>	<i>\$ 38,147</i>	<i>\$ 36,129</i>	<i>\$ 138,128</i>
Total Fund Revenue	\$2,602,451	\$ 252,157	\$ 259,689	\$ 203,554	\$ 144,338	\$ 80,501	\$ 36,129	\$3,578,820

The graph below reflects the last six years of project revenue activity in the Impact Fee Fund 2399. FY 24 revenues represent six months of receipts collected between July 1, 2023, and December 31, 2023, prior to the separation of each impact fee into its own fund and FY 25 reflects the full move to individual impact fee funds.

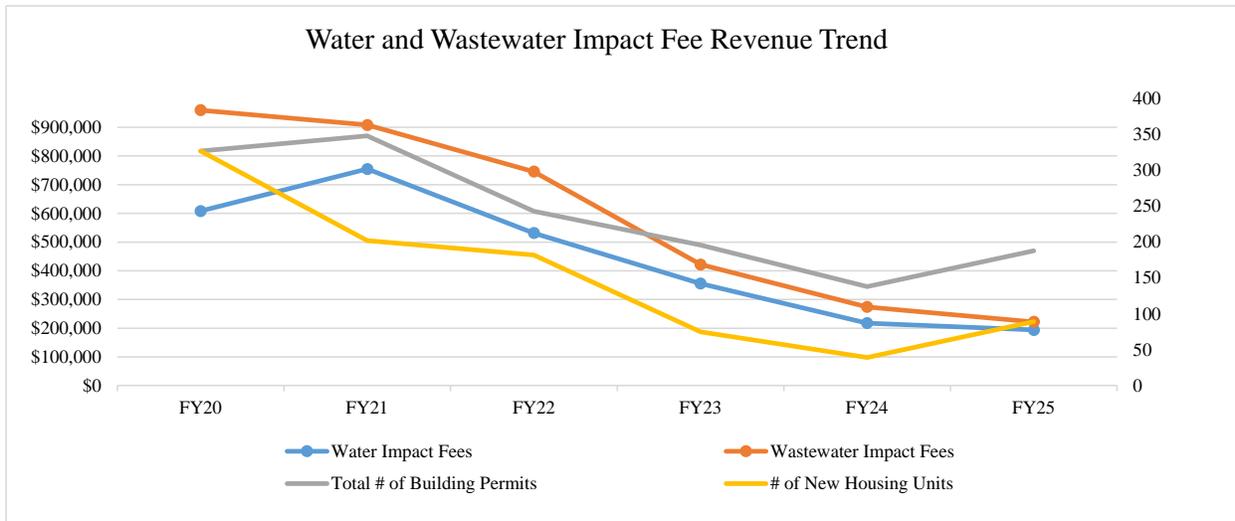


Whitefish has seen an increase in building activity in FY25 despite increased building costs and higher interest rates with 50 more permits issued. However, this increase is not represented in this fund as we have moved revenue to separate funds for each impact fee. The newly created impact fee funds will be discussed later in this report.

Water & Wastewater Impact Fees

In addition to the impact fees discussed above, the City also charges water and wastewater impact fees that continue to be accounted for separately in the Water Impact Fee and Wastewater Impact Fee Funds. The following table details the water and wastewater impact fees collected and interest earned for the entirety of the collection period from FY08 through FY25.

Impact Fee Description	FY08-FY19	FY20	FY21	FY22	FY 23	FY24	FY25	Total Revenue
Water Impact Fees	\$ 2,012,023	\$ 608,104	\$ 754,738	\$ 531,436	\$ 355,385	\$ 217,710	\$ 194,010	\$ 4,673,405
<i>Interest</i>	\$ 58,100	\$ 17,507	\$ 9,584	\$ 7,397	\$ 37,535	\$ 89,433	\$ 86,257	\$ 305,813
Total Fund Revenue	\$2,070,124	\$ 625,611	\$ 764,323	\$ 538,833	\$ 392,920	\$ 307,142	\$ 280,267	\$4,979,218
Wastewater Impact Fees	\$ 2,153,136	\$ 959,816	\$ 907,985	\$ 745,346	\$ 421,698	\$ 274,024	\$ 222,188	\$ 5,684,193
<i>Interest</i>	\$ 40,644	\$ 21,108	\$ 6,956	\$ 4,516	\$ 29,127	\$ 82,308	\$ 70,465	\$ 255,125
Total Fund Revenue	\$2,193,780	\$ 980,924	\$ 914,942	\$ 749,862	\$ 450,825	\$ 356,331	\$ 292,654	\$5,939,318



The water and wastewater impact fees completed the year with revenues totaling 86% and 82% of the FY25 budget, respectively. The FY25 budget more accurately anticipated the rate of building activity than in FY24. Water impact fees for FY25 decreased \$23,700 or 10.88% under FY24. Wastewater impact fees decreased by \$51,836 or 18.91% compared to the previous year. During FY25 the City experienced an increase in building permits, which would typically suggest an increase in water and wastewater impact fee revenue. However, the methodology for sizing meters was updated to follow the American Water Works Association (AWWA) standards. The change in meter sizing and types of development projects lead to a decrease in revenues. As depicted in the Water and Wastewater Impact Fee Revenue Trend Graph above, data shows that revenues received by the City are continuing to decline. Building costs remain high and interest rates have still been slow to drop and a look into the first quarter of FY26 has indicated that permit numbers are likely to remain flat. Project valuation, however, is on the rise and likely to exceed FY25. There is a potential for an increase in revenues in FY26.

In addition to the different types of impact fees paid, administrative expenses incurred when collecting the impact fees were charged to developers at a rate of 5% as allowed by law. The administrative charges are deposited into the General Fund for the individual impact fees, or the respective enterprise funds (Water/Wastewater). Below are the administrative fee collections since the impact fees were established:

Fund	FY08- FY19	FY20	FY21	FY22	FY23	FY24	FY25	Admin Fees Collected
General	\$ 128,251	\$ 12,734	\$ 12,843	\$ 10,600	\$ 6,338	\$ 4,509	\$ 15,666	\$ 190,940
Water	\$ 100,545	\$ 31,275	\$ 37,905	\$ 27,638	\$ 17,295	\$ 11,344	\$ 10,512	\$ 236,515
Wastewater	\$ 111,727	\$ 47,814	\$ 44,477	\$ 36,978	\$ 21,087	\$ 12,532	\$ 11,404	\$ 286,019
Total 5% Admin Fees	\$ 340,524	\$ 91,823	\$ 95,225	\$ 75,215	\$ 44,720	\$ 28,385	\$ 37,582	\$ 713,474

FY25 Administrative Impact Fee revenues have increased in the General Fund due to the increase in collected impact fees for City Hall, Paved Trails, Parks & Recreation, Fire & Ambulance, and Police described below. As reflected in the table on page 3, with a decrease in both Water and Wastewater Impact Fee revenue, the administrative fees for these funds also show a slight decrease from FY24. The overall increase in administrative fees is 32.4% over the prior year.

Current Report for Impact Fee Funds 2380-2384

As stated above, a new impact fee study was approved, and new impact fees were adopted with Ordinance 23-23 which became effective on January 1, 2024. New funds were created for each of the impact fees that would be collected going forward. Water, Wastewater, City Hall, and Paved Trail Impact Fees remained. The ESC Impact Fee has been separated out to reflect an impact fee for Fire & Ambulance and an impact fee for Police. The Stormwater Impact Fee was eliminated due to limited stormwater expansion projects on the horizon. Additionally, the state statute will come into play once the City of Whitefish reaches a population of 10,000 or more and the Municipal Separate Storm Sewer System (MS4) permit is required, which will result in the creation of a charge for the utility much like water and sewer. The Park Maintenance Building Impact Fee was revised to a Parks and Recreation Impact Fee to address growth-related park improvement projects.

New Impact Fee Fund Revenues

Below is a table showing the new impact fees and their corresponding fund numbers and six months of accumulated revenue in FY24 from January 1, 2024, to June 30, 2024, and the first complete fiscal year of collections in the new funds, FY25.

Impact Fee Funds	Fund Number	FY24 Impact Fee Revenues	FY24 Interest Earnings	FY 24 Total Revenues	FY25 Impact Fee Revenues	FY25 Interest Earnings	FY 25 Total Revenues	Total Revenues
City Hall	2380	\$ 12,741	\$ 62	\$ 12,803	\$ 100,789	\$ 1,853	\$ 102,642	\$ 115,445
Paved Trails	2381	\$ 10,208	\$ 50	\$ 10,258	\$ 67,352	\$ 1,304	\$ 68,656	\$ 78,914
Parks & Recreation	2382	\$ 4,698	\$ 23	\$ 4,721	\$ 30,651	\$ 591	\$ 31,243	\$ 35,964
Fire & Ambulance	2383	\$ 8,206	\$ 40	\$ 8,246	\$ 58,563	\$ 1,109	\$ 59,672	\$ 67,918
Police	2384	\$ 6,164	\$ 30	\$ 6,194	\$ 43,771	\$ 831	\$ 44,602	\$ 50,796
Total		\$ 42,017	\$ 205	\$ 42,222	\$ 301,126	\$ 5,688	\$ 306,814	\$ 349,036

Impact fees have a high correlation with building activity and the revenues the City receives reflect the amount of construction seen throughout the community. Below is a table summarizing total revenues for FY 25 across all funds. The increase in total revenues from FY24 revenues is approximately 17.05%.

	FY08-FY19	FY20	FY21	FY22	FY 23	FY24	FY25	Total Revenue
Fees - 2399	\$ 2,571,027	\$ 244,800	\$ 255,966	\$ 199,855	\$ 126,690	\$ 42,354		\$ 3,440,692
<i>Interest</i>	\$ 31,425	\$ 7,358	\$ 3,723	\$ 3,699	\$ 17,648	\$ 38,147	\$ 36,129	\$ 138,128
Impact Fee Fund Total	\$2,602,451	\$ 252,157	\$ 259,689	\$ 203,554	\$ 144,338	\$ 80,501	\$ 36,129	\$3,578,820
Water Impact Fees	\$ 2,012,023	\$ 608,104	\$ 754,738	\$ 531,436	\$ 355,385	\$ 217,710	\$ 194,010	\$ 4,673,406
<i>Interest</i>	\$ 58,100	\$ 17,507	\$ 9,584	\$ 7,397	\$ 37,535	\$ 89,433	\$ 86,257	\$ 305,813
Water Impact Fees Total	\$2,070,124	\$ 625,611	\$ 764,323	\$ 538,833	\$ 392,920	\$ 307,142	\$ 280,267	\$4,979,219
Sewer Impact Fees	\$ 2,153,136	\$ 959,816	\$ 907,985	\$ 745,346	\$ 421,698	\$ 274,024	\$ 222,188	\$ 5,684,193
<i>Interest</i>	\$ 40,644	\$ 21,108	\$ 6,956	\$ 4,516	\$ 29,127	\$ 82,308	\$ 70,465	\$ 255,125
Sewer Impact Fees Total	\$2,193,780	\$ 980,924	\$ 914,942	\$ 749,862	\$ 450,825	\$ 356,331	\$ 292,653	\$5,939,317
General 5% Admin Fees	\$ 128,251	\$ 12,734	\$ 12,843	\$ 10,600	\$ 6,338	\$ 4,509	\$ 15,666	\$ 190,940
Water 5% Admin Fees	\$ 100,545	\$ 31,275	\$ 37,905	\$ 27,638	\$ 17,295	\$ 11,344	\$ 10,512	\$ 236,515
Sewer 5% Admin Fees	\$ 111,727	\$ 47,814	\$ 44,477	\$ 36,978	\$ 21,087	\$ 12,532	\$ 11,404	\$ 286,019
Total Administration Fees	\$ 340,524	\$ 91,823	\$ 95,225	\$ 75,215	\$ 44,720	\$ 28,385	\$ 37,582	\$ 713,475
City Hall Fees - 2380						\$ 12,803	\$ 102,642	\$ 115,445
Paved Trails Fees - 2381						\$ 10,258	\$ 68,656	\$ 78,914
Parks & Rec Fees - 2382						\$ 4,721	\$ 31,243	\$ 35,964
Fire & Amb. Fees - 2383						\$ 8,246	\$ 59,672	\$ 67,918
Police Fees - 2384						\$ 6,194	\$ 44,602	\$ 50,796
New Impact Fee Funds Total						\$ 42,222	\$ 306,815	\$ 349,037
Total Impact Fee Revenues	\$ 7,206,879	\$ 1,950,516	\$ 2,034,179	\$ 1,567,464	\$ 1,032,803	\$ 814,581	\$ 953,446	\$ 15,559,868

Impact Fee Uses

Impact fees may be spent on public improvements including, but not limited to, planning, land acquisition, right of way acquisition, site improvements, necessary off-site improvements, construction, engineering, architectural services, permitting, applicable impact fees or mitigation costs, and any other expenses that can be capitalized with a useful life of 10 years or more. Impact fees may also be used to recoup public improvement costs previously incurred by the City to the extent that new growth and development will be served by the previously constructed improvements or costs incurred (MCA 7-6-1603).

Impact fees may not be used for the operation or maintenance of public facilities, nor may they be used for remodeling, rehabilitation or other improvements to an existing structure. Impact fees are used only for projects that address new demands due to growth.

FY25 Impact Fee Expenditures

The following table details the FY08-FY25 impact fee expenditures:

Expenditures/Transfers	FY08-FY19	FY20	FY21	FY22	FY23	FY24	FY25	Total Expenditures
Paved Trails	\$ 266,999	\$ 50,190	\$ 55,676	\$ 4,106	\$ 237,749	-	-	\$ 614,720
Park Maintenance Bldg.	\$ 22,324	-	-	-	-	-	-	\$ 22,324
Emergency Services Ctr.	\$ 851,772	-	-	-	-	-	59,256	\$ 911,029
City Hall	\$ 842,352	-	-	-	-	-	-	\$ 842,352
Stormwater	\$ 160,484	-	-	-	-	\$ 372	\$ -	\$ 160,856
Total Impact Fee Fund	\$2,143,931	\$ 50,190	\$ 55,676	\$ 4,106	\$ 237,749	\$ 372	\$ 59,256	\$ 2,551,280
Water Impact Fee	\$ 995,143	\$ 69,921	\$ 22,264	\$ 1,200,000	\$ 774,314	\$ 78,442	\$ -	\$ 3,140,085
Wastewater Impact Fee	\$ 1,154,821	\$ 1,000,000	\$ 661,963	\$ 849,080	-	-	783	\$ 3,666,647
Total Enterprise Funds	\$2,149,964	\$1,069,921	\$684,227	\$2,049,080	\$ 774,314	\$ 78,442	\$ 783	\$ 6,806,732
Total Impact Fee Expenditures		\$1,120,111	\$739,903	\$2,053,186	\$1,012,063	\$ 78,814	\$ 60,040	\$ 9,358,012

In FY25, this year’s Emergency Services Center improvements entailed a storage expansion project. No impact fee costs were incurred for the Parks Maintenance Building, City Hall, Paved trails, or Stormwater in FY25.

As for the new funds adopted in the Fall of 2023 that were created for the new fees in the Impact Fee Study and to comply with state law changes, it will take time to accumulate funds for future projects. When applicable, funds in the 2399 Impact Fee Fund will be utilized first or in conjunction with revenues from the new applicable funds.

The South Water Storage & Production project allows for 42.9% of project fees to be paid from Water Impact Fees, however in FY25, while significant expenditures were made on this project none were utilizing Water Impact Fee funds. Preliminary and final engineering is nearing completion on this project, and it is anticipated that impact fees will be employed substantially for Phase 1 and 2 of this project in FY26 and FY27.

The FY25 budget included an allocation of wastewater impact fees for future capacity enhancements in accordance with the Impact Fee Service Area Report, 44% of the project could be covered by impact fees but no outlay was made on this project in FY25. This project was carried over to FY 26.

Legislative Changes and the Future of Impact Fees

As mentioned earlier in this report, the 69th Montana Legislature restricted the right of local governments to impose fees for certain public facilities with Senate Bill 133. As a result, impact fees are no longer assessed for Parks & Recreation, Paved Trails and City Hall. Additionally, administrative fees can no longer be charged for any impact fees. This law became effective as of October 1, 2025.

Litigation Settlement

In 2021 the City discovered an error in the calculation of water and wastewater impact fees related to fixture counts. The City publicly acknowledged the error and began an audit to determine what refunds were owed to its customers. While the City was attempting to remedy its error, a putative class action lawsuit was filed in federal district court by five individuals and two developers. The lawsuit involved not only the fixture count issue, but allegations that the impact fees calculated by FCS Group and adopted by the City in 2019

were excessive. In November 2024, the Court accepted the settlement agreement for the Beck, et al. v. City of Whitefish, et al. case. Per the settlement agreement, the City was responsible for \$400,000 of the \$1.4 million, which was less than the estimated cost of continued litigation. Under the terms of the settlement agreement, reached through mediation, there is no admission of wrongdoing by the City. While the City has consistently acknowledged its inadvertent fixture count error, it has stood by, and continues to stand by, the reasonableness and accuracy of the impact fees that were calculated by FSC Group, a nationally renowned impact fee consultant.

Impact Fee Advisory Committee Review

On November 12, 2025, the Impact Fee Advisory Committee reviewed the FY25 Annual Report on Impact Fees for presentation to the City Council and moved to approve the report for consideration by the Council.

Recommendation

Staff respectfully request that the City Council review and accept the annual FY 25 report on impact fees.

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CITY MANAGER'S REPORT

December 30, 2025



MEETINGS

The Wave Board held its regular meeting on December 11th. The Board approved the 2026 Budget that includes a slight increase in membership fees to cover increasing operating and capital costs. The remodel of the former PTA space into a weightlifting area is expected to be completed in January. Additional areas in the Wave are scheduled to be remodeled in the coming months, including a larger turf area upstairs. We are excited about more space for our growing number of members.

OTHER

Firefighter Scott Alexander retired at the end of December 2025. Scott served as a paramedic for the Whitefish Fire Department for 23 years. Wishing him all the best in this next chapter of life!

CITY HALL CLOSED

City Hall will be closed Monday, January 19th, for Martin Luther King Jr. Day.

NEXT CITY COUNCIL MEETING

The next regular City Council meeting is scheduled for **Tuesday, January 20th**, due to the holiday on Monday. A work session will be held with the Parks Department regarding a proposed increase for City Beach boat launch fees. Immediately following, Planning staff will present an update on the progress of the Vision 2045: Growth Policy Update and review certain chapters completed by the Planning Commission to-date.

Future Work Session Topics:

Feb 2nd: Vision 2045: Growth Policy Update

Feb 17th: Vision 2045: Growth Policy Update

Respectfully submitted,

A handwritten signature in cursive script that reads "Dana".

Dana M. Meeker, CPA
City Manager

Staff Report



To: Mayor Muhlfeld and City Councilor

From: Dana Meeker, City Manager

Date: December 30, 2025

Re: Northwest Montana Community Land Trust Deed Restriction Release and Funding Request for 610 Trailview Way and 714 Trailview Way

Background

In June of 2018, the City Council approved the Trail View Preliminary Plat and Planned Unit Development (PUD) to develop 58 single-family homes on property at the corner of Monegan and Voerman Roads. The developer offered to deed restrict all units for local workers, with the sale price controlled by the Whitefish Housing Authority or the City’s Housing Coordinator, making the development the City’s most significant affordable housing development to date. The Trailview PUD was subsequently amended to clarify that only 50% of the units had purchase restrictions based upon income and then later amended to allow the developer to sell 10 units at market rate.

To date, the City Council has approved requests from the Northwest Montana Community Land Trust (NWMTCCLT) to release the City’s deed restrictions on eleven homes in the Trailview neighborhood, which have been replaced with the NWMTCCLT’s ground lease. The City Council also approved \$350,000 to assist the NWMTCCLT with the purchase of land under nine of the eleven homes.

Current Report

The NWMTCCLT has the opportunity for two additional homes at 610 and 714 Trailview Way to be added to their inventory (resale) and is requesting the release of the City’s deed restriction, which will be replaced with the NWMCLT ground lease to preserve the affordability of the home.

Additionally, the NWMTCCLT is requesting \$80,000 in funding to assist with the purchase of land under the two homes, \$40,000 each. It is anticipated that 610 and 714 Trailview Way will be sold to households making below 140% Area Median Income (AMI) which is within the range of AMI as required by the ground lease.

Below is a list of properties that are or will be a part of the NWMTCCLT inventory if the current request is approved:

Address	Status	Approved or Requested City Contribution
406 Trailview Way	Sold – 2023	\$0
715 Trailview Way	Sold – 2023	\$0
508 Trailview Way	Sold – 2024	\$30,000
611 Trailview Way	Sold – 2024	\$30,000
303 Trailview Way	Sold – 2024	\$30,000
307 Trailview Way	Sold – 2024	\$30,000
717 Trailview Way	Sold – 2024	\$30,000
711 Trailview Way	Sold – 2024	\$30,000
511 Trailview Way	Sold – 2025	\$30,000

405 Trailview Way	Sold – 2025	\$100,000
410 Trailview Way	Sold – 2025	\$40,000
610 Trailview Way	Pending	\$40,000
714 Trailview Way	Pending	\$40,000

Letters provided by NWMTCLT are included in the packet, as well as the proposed agreement if City Council approves the request.

Financial Requirements

The estimated appropriation currently available in the Affordable Housing Fund for FY26 is \$569,654. Of the available amount, \$201,109 is committed to the Alpenglow II project, \$6,000 is committed for an ADU built under the former Rent Local ADU program, \$40,000 was approved from 410 Trailview Way, and \$200,000 is committed for the Whitefish Workforce Rental Program. If the City Council supports the \$80,000 request by the NWMTCLT, approximately \$42,545 would still be available for other housing programs and initiatives through June 30, 2026.

Recommendation

Staff support the NWMTCLT’s request as it will increase the affordability of these homes from the authorized sale prices.

Staff respectfully recommend the City Council approve the request from the NWMTCLT to contribute \$80,000 from the City’s Affordable Housing Fund to facilitate the purchase of 610 Trailview Way and 714 Trailview Way, replace the existing deed restrictions with the NWMTCLT Ground Lease, and authorize the City Manager to execute the Seventh Agreement between the City of Whitefish and the NWMTCLT.



December 22, 2025

City of Whitefish
PO Box 158
Whitefish, MT 59937

City Council of Whitefish,

I am writing to request that you release the deed restriction on 610 Trailview in order to allow Northwest Montana Community Land Trust (NWMTCCLT) to add it to our inventory and place the standard Ground Lease upon that property in place of your current deed restriction. 610 Trailview will be purchased from the existing homeowner by someone on the NWMTCCLT waitlist who has expressed an interest in purchasing a home in Whitefish, works in Whitefish and has an income below 140% AMI. We are currently talking to two potential buyers who are determining their ability to purchase a home in Trailview with their lenders. NWMTCCLT will buy the land under the home which will lower the purchase price for the homebuyer.

As part of the financing, we are requesting \$40,000 from the City of Whitefish as part of the capital stack required to do this. The sale price of this home in 2022 was \$363,750. After 3 years and 248 days of ownership the homeowner is approved to sell the home for \$403,900. The deed restriction allows for up to a 3% annual increase in the resale price of the home (\$10,912 each year) to be prorated and not compounded. The benefits to the seller when they sell the home to a NWMTCCLT identified homebuyer include NWMTCCLT paying for a home inspection and steeply discounted services from a real estate agent who advises on legal paperwork. This contribution from the City will allow us to bring the purchase price down to an amount to at least \$363,900 and if necessary additional \$20,000 - \$40,000 of NWMTCCLT funds will be contributed to bring the price within range for this homebuyer to secure it with an appropriate mortgage.

We appreciate Whitefish's commitment to affordable and attainable workforce housing and dependable partnership with NWMTCCLT as we pursue our mission of securing affordable homeownership for low- and moderate-income households.

Sincerely,

Kim Morisaki

Kim Morisaki
Executive Director



December 22, 2025

City of Whitefish
PO Box 158
Whitefish, MT 59937

City Council of Whitefish,

I am writing to request that you release the deed restriction on 714 Trailview in order to allow Northwest Montana Community Land Trust (NWMTCCLT) to add it to our inventory and place the standard Ground Lease upon that property in place of your current deed restriction. 714 Trailview will be purchased from the existing homeowner by someone on the NWMTCCLT waitlist who has expressed an interest in purchasing a home in Whitefish, works in Whitefish and has an income below 140% AMI. We are currently talking to potential buyers who are determining their ability to purchase a home in Trailview with their lenders. NWMTCCLT will buy the land under the home which will lower the purchase price for the homebuyer.

As part of the financing, we are requesting \$40,000 from the City of Whitefish as part of the capital stack required to do this. The sale price of this home in 2022 was \$389,000. After 3 years and 15 days of ownership the homeowner is approved to sell the home for \$424,500. The deed restriction allows for up to a 3% annual increase in the resale price of the home (\$11,670 each year) to be prorated and not compounded. The benefits to the seller when they sell the home to a NWMTCCLT identified homebuyer include NWMTCCLT paying for a home inspection and steeply discounted services from a real estate agent who advises on legal paperwork. This contribution from the City will allow us to bring the purchase price down to an amount to at least \$384,500 and if necessary additional \$20,000 - \$40,000 of NWMTCCLT funds will be contributed to bring the price within range for this homebuyer to secure it with an appropriate mortgage.

We appreciate Whitefish's commitment to affordable and attainable workforce housing and dependable partnership with NWMTCCLT as we pursue our mission of securing affordable homeownership for low- and moderate-income households.

Sincerely,

Kim Morisaki

Kim Morisaki
Executive Director

**SEVENTH AGREEMENT BETWEEN CITY OF WHITEFISH AND NORTHWEST
COMMUNITY LAND TRUST, INC.**

Trailview Subdivision

THIS AGREEMENT is entered into as of the _____ day of _____, 2026, by and between the City of Whitefish, a municipal corporation ("City"), and Northwest Montana Community Land Trust, Inc. ("NWMTCCLT") with respect to the following facts:

A. In February of 2024, NWMTCCLT requested that the City Council authorize the transfer of \$90,000 held in the City's Affordable Housing Fund to NWMTCCLT to assist it with the purchase of the land under three homes located at 508, 611, and 303 Trailview Way for the purpose of ensuring the homes remain permanently affordable.

B. The City Council approved NWMTCCLT's request on March 4, 2024, and authorized the City Manager to execute a agreement with NWMTCCLT to transfer \$90,000 and release the "Affordable Housing Deed Restrictions" encumbering 508, 611, and 303 Trailview Way, as well as 307 Trailview Way.

C. NWMTCCLT additionally requested that the City Council authorize the transfer of \$60,000 held in the City's Affordable Housing Fund to NWMTCCLT to assist it with the purchase of the land under two homes located at 307 and 717 Trailview Way for the purpose of ensuring the homes remain permanently affordable.

D. The City Council approved NWMTCCLT's additional request on July 1, 2024, and authorized the City Manager to execute another agreement with NWMTCCLT to transfer the requested \$60,000 and replace the "Affordable Housing Deed Restrictions" encumbering 717 Trailview Way with NWMTCCLT's "Ground Lease."

E. On November 18, 2024, NWMTCCLT submitted a letter requesting that the City Council authorize the transfer of \$30,000 held in the City's Affordable Housing Fund to NWMTCCLT to assist it with the purchase of the land under an additional home in Whitefish located at 711 Trailview Way for the purpose of ensuring the homes remain permanently affordable and release the "Affordable Housing Deed Restrictions" encumbering the property.

F. The City Council approved NWMTCCLT's request on December 2, 2024, and authorized the City Manager to execute the agreement with NWMTCCLT to transfer the requested \$30,000 and replace the "Affordable Housing Deed Restrictions" encumbering 711 Trailview Way with NWMTCCLT's "Ground Lease."

G. On March 9, 2025, NWMTCCLT submitted a letter requesting that the City Council authorize the transfer of \$30,000 held in the City's Affordable Housing Fund to NWMTCCLT to assist it with the purchase of the land under an additional home in Whitefish located at 511 Trailview Way for the purpose of ensuring the home remains permanently affordable with an newly added income limitation and release the "Affordable Housing Deed Restrictions" encumbering the property.

H. The City Council approved NWMTCCLT's request on March 17, 2025, and authorized the City Manager to execute the agreement with NWMTCCLT to transfer the requested \$30,000 and replace the "Affordable Housing Deed Restrictions" encumbering 511 Trailview Way with NWMTCCLT's "Ground Lease."

I. On May 22, 2025, NWMTCCLT submitted a letter requesting that the City Council authorize the transfer of \$100,000 held in the City's Affordable Housing Fund to NWMTCCLT to assist it with the purchase of the land under an additional home in Whitefish located at 405 Trailview Way for the purpose of ensuring the home remains permanently affordable with a newly added income limitation and release the "Affordable Housing Deed Restrictions" encumbering the property.

J. The City Council approved NWMTCCLT's request on June 2, 2025, and authorized the City Manager to execute the agreement with NWMTCCLT to transfer the requested \$100,000 and replace the "Affordable Housing Deed Restrictions" encumbering 405 Trailview Way with NWMTCCLT's "Ground Lease."

K. On September 19, 2025, NWMTCCLT submitted a letter requesting that the City Council authorize the transfer of \$40,000 held in the City's Affordable Housing Fund to NWMTCCLT to assist it with the purchase of the land under an additional home in Whitefish located at 410 Trailview Way for the purpose of ensuring the home remains permanently affordable with a newly added income limitation and release the "Affordable Housing Deed Restrictions" encumbering the property.

L. The City Council approved NWMTCCLT's request on October 6, 2025, and authorized the City Manager to execute the agreement with NWMTCCLT to transfer the requested \$40,000 and replace the "Affordable Housing Deed Restrictions" encumbering 410 Trailview Way with NWMTCCLT's "Ground Lease."

M. On December 22, 2025, NWMTCCLT submitted a letter requesting that the City Council authorize the transfer of \$80,000 held in the City's Affordable Housing Fund to NWMTCCLT to assist it with the purchase of the land under two additional homes in Whitefish located at 610 Trailview Way and 714 Trailview Way for the purpose of ensuring the home remains permanently affordable and release the "Affordable Housing Deed Restrictions" encumbering the properties.

N. The City Council approved NWMTCCLT's request on January 5, 2025, and authorized the City Manager to execute the agreement with NWMTCCLT to transfer the requested \$80,000 and replace the "Affordable Housing Deed Restrictions" encumbering 610 and 714 Trailview Way with NWMTCCLT's "Ground Lease."

THEREFORE, for mutual consideration, the adequacy of which is hereby acknowledged, the parties agree as follows:

1. **City's Duties.**

- a. The City will file a "Release of Affordable Housing Deed Restrictions" with the Flathead County Clerk and Recorder to release the "Affordable Housing Deed Restrictions" encumbering 610 Trailview Way and 714 Trailview Way.
- b. Upon written confirmation by NWMTCCLT that it has secured commitments for the remaining funds necessary to purchase the land under the home at 610 Trailview Way, the City will transfer \$40,000 held in its Affordable Housing Fund to NWMTCCLT.
- c. Upon written confirmation by NWMTCCLT that it has secured commitments for the remaining funds necessary to purchase the land under the home at 714 Trailview Way, the City will transfer \$40,000 held in its Affordable Housing Fund to NWMTCCLT.

2. **NWMTCCLT's Duties.**

- a. After recordation of the "Release of Affordable Housing Deed Restrictions" referenced in Section 1(a) above, NWMTCCLT will enter into and record a "Ground Lease" for 610 Trailview Way in the same form that is attached hereto as Exhibit A.
- b. NWMTCCLT will use the \$40,000 transferred by the City solely to purchase the land under the home at 610 Trailview Way with the purpose of ensuring those homes are permanently affordable for individuals making below or within the range of 80% to 140% of Area Median Income.
- d. In the event NWMTCCLT does not purchase the land under the homes at 610 Trailview Way, it will reimburse the City for the \$40,000 transferred to NWMTCCLT and will ensure the "Affordable Housing Deed Restrictions" are executed by the homeowners and re-recorded.
- e. After recordation of the "Release of Affordable Housing Deed Restrictions" referenced in Section 1(a) above, NWMTCCLT will enter into and record a "Ground Lease" for 714 Trailview Way in the same form that is attached hereto as Exhibit A.
- f. NWMTCCLT will use the \$40,000 transferred by the City solely to purchase the land under the home at 714 Trailview Way with the purpose of ensuring those homes are permanently affordable for individuals making below or within the range of 80% to 140% of Area Median Income.
- g. In the event NWMTCCLT does not purchase the land under the homes at 714 Trailview Way, it will reimburse the City for the \$40,000 transferred to NWMTCCLT and will ensure the "Affordable Housing Deed Restrictions" are executed by the homeowners and re-recorded.

6. **No Assignment.** Neither this Agreement, nor any interest herein, shall be assigned, transferred, hypothecated or otherwise conveyed by either party without the prior

written consent of the other party.

7. **Modification.** This agreement may only be modified by a written amendment signed by both parties.

8. **Entire Agreement.** Except as to agreements referred to herein, this Agreement contains the entire agreement of the parties hereto and supersedes any prior written or oral agreements between them concerning the subject mater contained herein. There are no representations, agreements, arrangements, or understandings, oral or written, between the parties hereto relating to the subject matter contained in this Agreement which are not fully expresses herein.

9. **Partial Invalidity.** Each term, covenant, condition or provision of this Agreement shall be viewed as separate and distinct, and in the event that any such term, covenant, condition or provision shall be held by court of competent jurisdiction to be invalid, the remaining provisions shall continue in full force and effect.

10. **Successors in Interest.** Subject to the restrictions against assignment as herein contained, this Agreement shall inure to the benefit of, and shall be binding upon, the assigns, successors in interest, personal representatives, estate, heirs, and legatees of each of the parties hereto.

11. **Necessary Acts.** Each party to this Agreement agrees to perform any further acts and execute and deliver any further documents that may be reasonably necessary to carry out the provisions of this Agreement.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the day and year first above written.

CITY OF WHITEFISH

NORTHWEST MONTANA COMMUNITY
LAND TRUST, INC.

By: _____
Dana Meeker, City Manager

By: _____

Its: _____

Date: _____

Date: _____

Exhibit A

NWMTCLT Ground Lease

(To be added prior to execution)

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Michelle Howke

From: Keegan Siebenaler <policy@shelterwf.org>
Sent: Wednesday, December 10, 2025 6:36 AM
To: Michelle Howke
Subject: City Council Public Comment
Attachments: Housing White Paper.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

You don't often get email from policy@shelterwf.org. [Learn why this is important](#)

ATTENTION: External Email - This email originated from outside the City of Whitefish. Use caution when clicking links or opening attachments unless you recognize the sender and are expecting the contents. Contact the [IT Helpdesk](#) if in doubt.

Dear Mayor Muhlfeld and City Council Members,

On behalf of Shelter WF, I am writing to urgently request that the City Council formally adopt the community housing needs projections in the *Shelter WF Revised Community Housing Needs Assessment*. Our analysis demonstrates that the City's current Housing Needs Assessment (HNA) dangerously underestimates the scale of our crisis, capturing as little as 23% to 46% of the actual housing required over the next decade. **The full report is attached.**

The current City-commissioned HNA projects a need for only 930–1,491 new homes by 2034. This projection relies on methodological flaws that do not reflect the reality of Whitefish today. Specifically, it uses pre-pandemic population growth rates (1.6%) rather than the actual post-2019 annualized rate of 3.9%, and it wholly ignores the 1,739 homes needed to accommodate commuting workforce who would move here if housing were available and thus contribute to demand.

By relying on the current undercount, we risk cementing a policy of scarcity that will accelerate displacement and worsen our labor shortages. Our revised report identifies a true need of **3,230 to 4,044 new homes** over the next ten years. This provides an honest baseline for the zoning reforms necessary to stabilize prices.

The housing needs assessment currently projects that 86% of all new rentals must be subsidized. Given that only 12% of rental units were subsidized over the past decade, this projection is unrealistic. Under Shelter WF's revised demand estimate, the share of rentals requiring subsidy falls to 20–25%, a far more achievable target. A robust supply of market-rate housing is the only viable path to cross-subsidize the deed-restricted units our community desperately needs.

The cost of overestimating housing need is virtually nonexistent; the cost of underestimating it is the continued erosion of our community's workforce and character. We urge you to adopt these revised figures to ensure Whitefish plans for a future where all residents can afford to live.

Sincerely,
Keegan Siebenaler
Executive Director, Shelter WF

Shelter WF Revised Community Housing Needs Assessment



Prepared By

Keegan Siebenaler, Executive Director

1. Executive Summary

As required under the Montana Land Use Planning Act (MLUPA), the City of Whitefish commissioned a Housing Needs Assessment (HNA) that estimates the amount of housing that needs to be built in the city over the next 10 years to meet future population growth demand.

Methodological failures in the HNA have led to a projected future housing need that is far too low, and thus is profoundly inaccurate. Using the same data as the HNA itself, this report finds that the need for new homes in Whitefish over the next 10 years is between 3,230 and 4,044, rather than the 930-1,491 identified in the HNA. **Therefore, the existing Housing Needs Assessment captures only 23% - 46% of actual housing needs over the next 10 years.** Past HNAs conducted in 2017 and 2022 concluded (when viewed retrospectively) that Whitefish has been building enough new homes each year (around 150 units per year) to meet demand, yet home prices in Whitefish have continued to climb dramatically, indicating that the real demand far exceeds this number. The current 2025 HNA states that a significant and unrealistic number of new homes must be built below market-rate, requiring subsidization, to serve the local workforce in Whitefish, but this likely would not be the case if the number of market-rate homes built each year more closely matched the demand for homes, both in number and size. **The improved methodology in this report provides the City of Whitefish with an actual path to housing affordability: allowing for and encouraging the construction of 300 and 400 new homes each year.**

2. Background

The City of Whitefish 2025 Housing Needs Assessment (HNA) is a crucial document in determining future housing needs in Whitefish. The most important quantitative data contained within this report is in Section 5, the Community Housing Needs Estimate¹. This estimate of total housing need is the most important number contained within the report. As part of the Growth Policy process, 76-25-206 (1), MCA states that:

“A local governing body shall identify and analyze existing and projected housing needs for the projected population of the jurisdiction and provide regulations that allow for the rehabilitation, improvement, or development of the number of housing units needed, as identified in the land use plan and future land use map.”

Therefore, correctly projecting the housing needs for the City of Whitefish is of critical importance to the City’s compliance with state law, not to mention the importance of housing to the quality of life of Whitefish residents and workers. Note that MLUPA requires planning for housing growth over a 20-year timeframe, beyond the scope of the HNA. Based on the presentations made by land use consultants CZB, Inc., the resolution to this discrepancy is to double the 10-year figure. Therefore, the consequences of an inaccurate projection are only more important over a 20-year period.

The HNA estimates the 10-year housing need in Figure 1.

¹ City of Whitefish (2025). *2025 Housing Needs Assessment*.
<https://www.cityofwhitefish.gov/DocumentCenter/View/6103/City-of-Whitefish-2025-Housing-Needs-Assessment>

Figure 1: City of Whitefish 10-year Housing Need Estimate 2024-2034²

Item	High	Mid	Low	Notes
New Units Needed Due to Population Change 2024-2035	1,339	957	778	Montana Department of Commerce Population Projections (low, medium and high ranges of growth)
New Units Needed Due to Overcrowding	91	91	91	"Severe Overcrowding" is defined by Census and HUD as homes with more than 1.5 occupants per room. Rooms are defined as the total number of rooms, not just the bedrooms. American Community Survey (ACS) 2019-2023 5-Year Estimate
Units needed due to existing pent-up demand	61	61	61	Calculated based on a modeled rate informed by community survey responses to the questions "Is there anyone currently staying in your house on a temporary basis because they cannot afford housing or have no other alternatives?" and "Would you or other people in your household like to be living in a different housing situation if they could?"
Total New Units Needed	1,491	1,109	930	
Estimated annual absorption	149	111	93	Calculated over a 10-year period
Rehab Needed Due to Housing Condition	539	539	539	American Community Survey (ACS) 2019-2023 5-Year Estimate. Replacement rate based on age of housing stock (built before 1970), units without kitchen and plumbing and mobile home units
Total Need	2,030	1,649	1,469	

As shown in Figure 1, the most significant contribution to the city's total housing need is the construction of new units. This number, titled *Total New Units Needed*, ranges between 930 and 1,491 units based on different possible rates of future population growth.

These values, determined based on flawed methodology and assumptions, are much below realistic projections and mislead City staff, council, volunteers, and citizens as to the scale and the solutions to housing in Whitefish.

² City of Whitefish (2025). *2025 Housing Needs Assessment*. Page 40.

3. Methodological Failures in the Assessment

It is, of course, obvious to anyone in the valley that Whitefish is unaffordable to broad swaths of the population. The HNA's finding that the city could *reduce* the amount of new units it approves per year is not only facially inaccurate on first glance, it is in direct contradiction to the economic consensus around causality of the housing price increases in the past decade. The weight of economic research indicates that:

- 1) The primary cause of housing price acceleration over the past decade is due to a chronic shortage of housing supply.³
- 2) Increasing the supply of market-rate housing reduces market rents or slows the increase of rents throughout the region.^{4,5}
- 3) The chains of moves resulting from new supply frees up both sale and rental units down-market, providing affordability to more people than the additional units themselves create.⁶

With this background in mind, evaluating the methodology used to derive the *Total New Units Needed* figure reveals fundamental flaws that miss the primary sources of unmet housing demand in the City of Whitefish.

³ Khater et. al. (2025). *Housing Supply: A Growing Deficit*. Freddie Mac. <https://www.freddiemac.com/research/insight/20210507-housing-supply>

⁴ Been, V., Ellen, I. G., & O'Regan, K. (2025). *Supply Skepticism Revisited*. *Housing Policy Debate*, 35(1), 96–113. <https://doi.org/10.1080/10511482.2024.2418044>

⁵ Phillips et al. (2021). *Research Roundup: The Effect of Market-Rate Development on Neighborhood Rents*. UCLA Lewis Center for Regional Policy Studies. <https://escholarship.org/uc/item/5d00z61m>

⁶ Mast, E. (2019). *The Effect of New Market-Rate Housing Construction on the Low-Income Housing Market*. Upjohn Institute. https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3426103

Problem 1: Overly Conservative Population Growth Estimates

Over 90% of the *Total New Units Needed* in the existing element are derived from projections of population growth. These population estimates are based on derivations from the 2010-2019 population growth rate in Whitefish (1.6%). There are two major problems with this estimate:

1. The HNA acknowledges that population growth since 2019 is much higher than growth from 2010 to 2019, with an annualized growth rate of 3.9% per year. **Relying on population projections from before pandemic-induced demand for mountain towns like Whitefish will dramatically underestimate population growth.** Given the continued population growth and rental price strength since 2019, a growth rate of 3.9% per year forms the basis for the “high growth” scenario of our revised estimate.
2. Population growth in the City of Whitefish has been limited by restrictive land use and zoning policies. Hundreds of potential units have been denied under the Planned Unit Development (PUD) process over the past 5 years. Additionally, an unknown number of units were not built because of existing limitations on density imposed by various elements of Whitefish City Code. **As such, basing housing demand on existing restrictive land use decisions is circular reasoning, as actual demand for housing gets further and further ahead of supply.** As such, the population growth under a more permissive regulatory environment for supply would be higher than the current rate of population growth. MLUPA essentially requires that cities allow for increased housing density, meaning that Whitefish’s new baseline will allow for more homes to be built by-right, rendering past development patterns somewhat moot in predicting future demand. As such, a more conservative estimate of population growth controlling for Whitefish-specific land use restrictions would be the growth rate of the valley as a whole. This rate has averaged out to around 2% since 2000.⁷ This forms the basis for the “low growth” scenario of our revised estimate.

⁷ US Census Bureau. (2025). *Resident Population in Flathead County, MT*.
<https://fred.stlouisfed.org/series/MTFLAT0POP>

Problem 2: Ignoring Sources of Commuting Housing Demand

Whitefish has the highest rate of in-commuters within the Flathead Valley. The HNA estimates that 61% of workers in Whitefish, around 4,7000 workers, commute into Whitefish from outside the ZIP code. Note that 59937 contains sources of population outside of city limits, such as Happy Valley and KM Ranch Road. Therefore, the number of workers commuting into city limits is even higher. Regardless, **the 61% of Whitefish workers commuting represents a significant source of housing demand.** This demand is ignored in the current HNA.

While not every worker would move to Whitefish if the opportunity presented itself, a significant percentage of Whitefish workers would live in Whitefish, and therefore contribute to the demand of housing in the city. To estimate the percentage of the Columbia Falls Housing Needs Study surveyed employers which estimated that 37% of commuters would move to the Columbia Falls area if housing was available⁸. **Applying this to the 4,700 workers commuting to Whitefish results in demand for an additional 1,739 homes.**

Note that this estimate is conservative as it only looks at current commuting demand and not the inevitable increase in commuting demand over the next 10 years.

⁸ City of Columbia Falls (2025). *Housing Needs Study*. Page 34. <https://www.cityofcolumbiafalls.org/media/4131>

4. Shelter WF Revised Estimate of Housing Needs

Including the new estimates of population growth and commuting demand, the number of new homes that the city of Whitefish needs over the next 10 years is between 3,230 and 4,044, which is much higher than the existing estimate of 930-1,491 homes. Therefore, the existing HNA captures only 23% - 46% of actual housing needs over the next 10 years.

Figure 2: ShelterWF 10-year Housing Need Estimate 2024-2034

Item	High Estimate (3.9%)	Low Estimate (2.0%)	Notes
Population Change 2024-2034	4,314	2,690	
New Units Needed Due to Population Change 2024-2034	2,153	1,339	<i>Assumes 2.02 occupants per residence, unchanged from original study</i>
New Units Needed Due to Overcrowding	91	91	<i>Unchanged from original study</i>
Units needed due to existing pent-up demand	61	61	<i>Unchanged from original study</i>
Units needed due to commuting demand	1739	1739	<i>37% of existing commuters</i>
Total New Units Needed 2024-2034	4,044	3,230	
Total New Units Needed Per Year	404	323	
Estimated annual absorption	40.44	32.3	<i>Unchanged from original study</i>
Rehab Needed Due to Housing Condition	539	539	<i>Unchanged from original study</i>
Total Need 2024-2034	4,623	3,801	

This number, while shocking to those operating under the assumptions of the existing estimate of housing needs, is much more realistic in the context of the HNA as a whole. Given the dramatic lack of supply in Whitefish, the rest of the HNA has to make unreasonable assumptions about the types of housing needed for the community's needs to be met. The Housing Bridge represented in Figure 2 of

the HNA shows that 86% of new rental units need to be priced below market-rate through subsidy. **Given that the percentage of rental units priced below market-rate that were added over the past 10 years was 12.2%, the figure of 86% is wholly unrealistic.** Figure 3 compares the percentage of rental units that would require subsidy in the existing HNA and the ShelterWF Revised estimates.

Figure 3: Comparison of Subsidized Unit Need

Item	2016-2024 Development	Existing HNA	High Estimate (3.9%)	Low Estimate (2.0%)	Notes
Total New Units Needed	1,259 units provided	957	4,044	3,230	
Total Rental Units Needed	792 units provided	580	2,548	2,035	Rentals comprise 63% of total units (from original study)
Subsidized Rental Units Needed	97 units provided	499	499	499	Unchanged from original study
Percentage of Rental Units Requiring Subsidy	12.2% provided	86.0%	19.6%	24.5%	

Note that MLUPA requires planning for housing growth over a 20-year timeframe, beyond the scope of the HNA. Based on the presentations made by land use consultants CZB, Inc., the resolution to this discrepancy is to double the 10-year figure. Therefore, the consequences of an inaccurate projection are only more important over a 20-year period. **Over 20 years, the HNA underestimates housing needs by between 3500 and 6200 units.**

5. Conclusions

ShelterWF is confident that our methodology better reflects actual demand for housing in Whitefish. Furthermore, **Whitefish must err on the side of overestimating housing need, not underestimating it.** Underestimating housing needs has severe consequences. In fact, this report reveals that the accelerating trends of displacement, cost spiral, and worker loss in Whitefish are evidence of undersupply in the past. By contrast, if you overestimate housing needs, and zone for more

housing than is eventually needed, the harms are virtually nonexistent. If zoning capacity is too low, the entire city suffers as we underbuild infrastructure in addition to housing. If zoning capacity is too high, then development simply doesn't take place.

The existing HNA highlights that Whitefish has significant need for deed-restricted and subsidized housing. ShelterWF agrees with this, and strongly supports the city and associated nonprofits like Housing Whitefish and the Whitefish Housing Authority in this mission. We must significantly increase funding to affordable housing initiatives and bolster the existing Legacy Homes Program to have a chance of achieving the required 50 units of subsidized rental housing per year. But a significant proportion of subsidized housing units are created through cross-subsidization in projects with mostly market-rate housing. Thus, accurately estimating the high demand for market-rate housing is entirely compatible, and in fact additive, to subsidized housing.

ShelterWF acknowledges that raising this concern, at this time, is not convenient. The housing element of the growth policy has already been drafted, and the land use element of the growth policy is already well underway. But a study that directs our city to *contract* the amount of housing it builds, not expand it, is one that demands further scrutiny. This single number has tremendous power for policymakers when building the land use plan and zoning reforms necessitated under MLUPA.

As the HNA highlights, the city of Whitefish is facing the most severe housing crisis in the Flathead Valley. 61% of all renter-occupied households in Whitefish are cost burdened (above the national average of 50%) with 38% falling into the severely cost burdened category (above the national average of 26.5%).⁹ Truly serving the community of Whitefish and those who are affected by the housing crisis necessitates correcting the faulty assumptions that underlie the Housing Needs Assessment before it is too late.

⁹ City of Whitefish (2025). *2025 Housing Needs Assessment*. Page 27.

Michelle Howke

From: Keegan Siebenaler <policy@shelterwf.org>
Sent: Tuesday, December 30, 2025 11:41 AM
To: Michelle Howke
Subject: City Council Public Comment for January 5, 2026

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Dear Mayor Muhlfeld and City Council Members,

I am writing on behalf of Shelter WF in response to the Agnew Beck Memo *Re: Whitefish Community Housing Needs Assessment Talking Points* that was sent to Alan Tiefenbach on December 16, 2025. While the memo attempts to defend the current Housing Needs Assessment (HNA), it also contains several important admissions that reinforce Shelter WF's core conclusion: **Whitefish must plan for significantly more housing than the current HNA identifies.** At the same time, ShelterWF believes that the memo's response falls short in several critical areas that deserve Council's careful attention.

First, the consultants explicitly acknowledge that **higher housing numbers are warranted.** The memo recommends adding a new "high growth" scenario based on recent population trends and concedes that, if growth continues at post-2019 rates, Whitefish's 10-year housing need would increase to as many as 2,150 units—well above the upper bound of the adopted HNA. **This is an important reversal. It confirms that the original assessment understated demand and that planning based solely on the existing HNA risks under-zoning for housing.**

However, even this revised "high scenario" remains materially incomplete.

Most notably, the memo reasserts that existing population growth is the best measure of existing demand. The consultants are narrowly correct that this method is in line with Department of Commerce estimates. But Whitefish should acknowledge that the unique demand of such a desirable mountain town means that simple population extrapolation is limiting. Next year, hundreds of new units will come online and the population of Whitefish will see significant growth. This is a perfect example of the central claim of our report: **Population forecasts are constrained by past development patterns and existing zoning limits.** When housing supply is restricted, population growth is artificially suppressed, and unmet demand simply shows up as longer commutes and worker displacement rather than as new residents.

The consultants further suggest that commuter demand should only be counted if housing is subsidized and deed-restricted. This framing misunderstands how housing markets function. The evidence is clear that **adding sufficient market-rate housing reduces price pressure across the entire housing stock,** freeing up naturally affordable units and reducing displacement without requiring every new home to be subsidized. **Treating commuter demand**

as exclusively a subsidized housing problem incorrectly shifts attention away from the core issue: overall supply.

The memo also raises concerns about the scale of affordable housing required if commuter demand is acknowledged. Shelter WF agrees that this would require significant investment—but that conclusion strengthens, rather than weakens, the case for planning for higher total housing numbers. Underestimating need does not make affordability challenges disappear; it guarantees they will worsen.

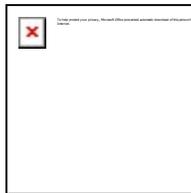
The consultants' memo confirms what residents already experience daily: Whitefish's housing demand is higher than previously acknowledged. Shelter WF urges the City Council to treat the memo's admissions seriously, correct the remaining omissions, and err on the side of **planning for abundance rather than scarcity**. Overestimating housing needs carries little risk. Underestimating it has already reshaped our community in painful and irreversible ways.

Thank you for your consideration and continued service to the City of Whitefish.

Sincerely,

Keegan Siebenaler
Executive Director
Shelter WF
policy@shelterwf.org

Shelter WF aims to fix the broken housing system in Whitefish, the Flathead Valley, and Montana. Our community-led movement advocates for policy reforms that lead to an abundance of homes in all shapes and sizes.



shelterwf.org

Michelle Howke

From: Terry Marasco <terrymarasco@montana@gmail.com>
Sent: Wednesday, December 3, 2025 1:55 PM
To: Michelle Howke
Subject: For Planning Dept and City Council
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Best,

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Terry Marasco
Flathead Valley, Montana!

"Objects in the mirror are closer than they appear."

Raising Montana’s base teacher pay to meet the actual cost of living, including affordable housing, is essential to strengthening our communities, improving student outcomes, and securing Montana’s long-term economic future.

By Terry Marasco, November 2025

Submitted to the Whitefish Planning Board, the Whitefish Community Council, and the Montana Legislature School Funding Commission (Current)

1. The Community Case: Teachers Build the Character of Montana Towns

Teachers are not just employees of a school district—they are cultural anchors of the community.

When teachers can afford to live where they work, two things reliably happen:

- 1. Stronger family and student relationships.**

Teachers understand local social, cultural, and economic conditions and use that knowledge to reach students more effectively.

- 2. Higher student engagement and connectedness.**

Connectedness is one of the strongest predictors of academic success.

Community identity and cohesion.

In many rural towns, teachers are coaches, mentors, volunteers, and leaders. When they cannot live locally, communities lose part of their identity.

Montana’s affordability crisis is eroding this foundation.

2. The Workforce Case: Montana Cannot Grow Without Educators

Every major industry identified for Montana’s 10–20 year growth depends on a strong education pipeline:

- **Clean energy** needs technicians, electricians, and environmental scientists.
- **Technology and remote work** need software and data talent.
- **Value-added agriculture:** needs ag-tech operators and logistics specialists.
- **Health care and telehealth** need nurses and behavioral health professionals.
- **Mass timber and advanced wood products** need engineers and CAD/CAM staff.
- **Outdoor recreation manufacturing** needs designers and skilled fabricators

None of these industries can expand if the education workforce collapses.

Teachers are the talent engine behind every other sector.

3. The Economic Case: Educators Stabilize Rural Labor Markets

Montana's number one economic threat is **labor shortages**, especially in rural areas. Educators directly influence three pillars of workforce stability:

1. **Labor force participation:**
Strong K–12 outcomes lead to higher wages and long-term workforce engagement.
2. **Family retention:**
Families stay—or leave—based on school quality.
3. **Youth retention:**
Students who experience strong academics and CTE programs are more likely to remain in Montana.

In short, **teachers are an economic development strategy.**

4. The Housing Reality: Current Teacher Pay Does Not Match Montana's Cost of Living

- **Average Montana base teacher salary:** ~\$42,762
- **Average high school teacher salary:** ~\$52,369
- **Entry-level teacher salary:** ~\$38,800

Housing:

- *Typical Montana home price:* ~\$635,000
- *Example:* A \$422,000 mortgage at 6.6% with 10% down produces a payment of **~\$2,700/month**
 - That is **61%** of income for an average high school teacher.
 - **83%** for an entry-level teacher

Rent:

- *Flathead Valley 2-bedroom:* ~\$1,700/month
 - **38%** of income for a high school teacher
 - **52%** for an entry-level teacher

Housing is the largest cost driver and the clearest gap between what teachers earn and what Montana requires for basic living.

5. The Academic Case: Why Higher Pay Improves Achievement

Four mechanisms are well supported in economic and education research:

1. **Recruitment:** Better pay broadens applicant pools and raises instructional quality.
2. **Retention:** Higher pay reduces turnover and preserves experience.
3. **Motivation:** Well-designed compensation systems encourage stronger performance.
4. **Opportunity cost:** If local wages and housing rise faster than teacher pay, quality declines as educators leave for other fields.

Teacher pay is not a symbolic gesture—it is an instructional intervention.

6. Cost of Living Benchmarks

- **Single adult in Montana:** ~\$2,500–\$2,700/month
- **Family of four:** ~\$5,700+/month
- **Healthcare:** ~\$9,081 annually per person
- **Housing:** the dominant affordability pressure for educators

The math is simple: **Current teacher salary structures are misaligned with the actual cost of living.**

7. Recommendation

Support and advance policies that:

1. **Raise base teacher pay to cost-of-living parity statewide**
(not through temporary stipends, but through permanent salary schedule adjustments).
2. **Incentivize local housing solutions for educators**
through partnerships with municipalities, nonprofits, and developers.
3. **Protect rural districts**
through funding formulas that recognize geographic disparities in housing markets.
4. **Stabilize the educator pipeline**
with competitive wages that make teaching a career Montana families can sustain.

Closing

Montana's future economy—from clean energy to healthcare to advanced manufacturing—runs on the strength of the education system. The education system runs on teachers. And teachers cannot sustain the profession if they cannot afford to live in the communities they serve.

Raising teacher pay to meet the actual cost of living is the clearest path to stronger schools, stronger communities, and a stronger Montana economy.