



# FACILITIES & BOND FINANCING WORKSHOP

November 28th and 29th, Helena, MT

[zoom attendees can plan on beginning at 8:30 am](#)

## Day 1: Tuesday, November 28th

- 8:00 - 8:30 Welcome and Registration
- 8:30 - 9:30 The Bond Process- Where to start: This “OAC” team (Owner’s Rep, Architect, Contractor), will discuss how they organize and the steps you can take to get started and proceed with a facilities project.
- Architect- Anthony Houtz, Cushing Terrell  
Owners Rep- Tyson Watson, Hulteng, Inc.  
Contractor- Alec Pinero, Sletten, Inc.
- 9:30 – 11:00 Funding Considerations- Bonding
- Bridget Eckstrom and Crystal Vogl, DA Davidson & Co.  
Courtney Ellis, Dorsey & Whitney, LLP
- 11:00 – 11:15 [Break](#)
- 11:15 - 11:45 Intercap Loans
- Louise Welsh, Montana Board of Investments
- 11:45 - 12:45 Elections, School Coding & other Business Office Obligations
- Rebekah Rhoades, Lewistown Schools  
Kim Aarstad, East Helena Public Schools
- 12:45 - 1:30 [Lunch - THANK YOU D.A. DAVIDSON & CO.!](#)
- 1:30 - 3:00 Design-Build as an Alternative to Traditional OAC and ESPC Projects- including ESSER, IRA and RAS funding.
- Halvor Kamrud and Bob Moore, McKinstry  
Dan Rispens, East Helena Public Schools
- 3:00 - 3:15 [Break](#)
- 3:15 - 4:15 Round Table Discussion

**Day 2: Wednesday, November 29th**

- 8:30 - 10:30 am Bid and Purchasing Law  
Rich Batterman, MREA
- 10:30 - 10:45 [Break](#)
- 10:45 - 11:45 Building Technology  
Liz Cunningham, Tiffani Anderson, & Dr. Linda Filpula,  
T.E.S.T., Inc
- 11:45 - 12:45 Funding & Resources to Meet Continued Lead Water Testing Requirements  
Gregory Montgomery, MT Dept of Environmental Quality
- 12:45 - 1:15 [Lunch - THANK YOU DORSEY!](#)
- 1:15 - 2:15 Contractor's Gross Receipts  
Kim Beckstrom and Danay Pittard, MT Dept. of Revenue
- 2:15 - 2:30 [Break](#)
- 2:30 - 3:30 Bond Elections - Nicole Thuotte, OPI

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