



FY 2022

Business Improvement District Work Plan and Budget Proposal



Presented and Prepared By
Micky Zurcher, Executive Director
Approved by the Board of Trustees on
April 13, 2021

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Organization Summary

The Helena Business Improvement District (HBID) purpose is to promote the health, safety, prosperity, security, and general welfare of the inhabitants of the district. The HBID functions under [Montana Code Annotated](#) Title 7. Local Government, Chapter 12. Improvement Districts, Part 11. Business Improvement Districts. Key powers (Section 7-12-1131, MCA) of the Helena BID include but are not limited to five of the nine functions: (1) sue and be sued, enter into contracts, and hire and terminate personnel needed for its purposes; (2) provide maintenance and cleaning personnel for the protection and enjoyment of the general public using the business district, (3) landscape and beautify public areas and to maintain those areas; (4) provide for the management and administration of the affairs of the district; and (5) promote business activity by advertising, decorating, marketing, promoting, and managing events and other actions designed for the general promotion of business activities in the district. The HBID is funded by property assessment within the HBID boundary signed by the owners of more than 60% of the area. The district duration is for a period of ten years. On January 13th, 2020, the City Commission passed a resolution to create a business improvement district for up to ten (10) years.

Downtown Helena Inc. (DHI) is a member organization whose purpose is to encourage a spirit of cooperation, establish and develop cooperative retail sales promotions, special events, and other activities, and to foster favorable public relations for the Downtown Helena community, organizations, and agencies served in Downtown. DHI is funded through annual membership dues, sponsorships, and event income. Through a Memorandum of Understanding (MOU) and Contract for Services, the HBID provides specific services to DHI.

The Helena Business Improvement District board meets monthly on the second Tuesday at 3:30 p.m. at our office trailhead; 330 Jackson St.

Downtown Helena Inc. board meets monthly on the second Tuesday at 8:30 a.m. at our office trailhead; 330 Jackson St. DHI hosts a monthly membership meeting the third Wednesday at 8:30 a.m. at our trailhead.

FY21 Accomplishments

HBID Projects

- ✓ Awarded \$10,000 in Façade Grants
- ✓ Member of the Montana Main Street program top tier designation
- ✓ Updated 145 summer banners to a bright red “Shop Dine Play”
- ✓ Updated 15 trash receptacles in historic downtown
- ✓ Maintained streetscape clear of trash

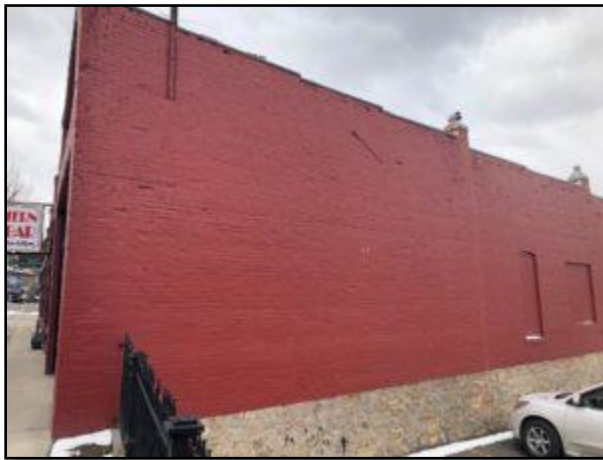


- ✓ Upgraded PVC event fencing to quality event fencing
- ✓ Assessment formula ad hoc committee exploring formula options
- ✓ Marketing “Rediscover Downtown Helena” radio ads, yard signs, bulletin boards



Façade Improvements

Western Gold LLC – 406 N Last Chance Gulch



Before: Blank canvas wall



After: Local artist and muralist creates a fun, identifiable marker

Boston Block LLC – 25 S Last Chance Gulch (Lasso the Moon)



Before: 20-year-old awning showing its age, torn, and tattered



After: Matching awnings addressing ongoing safety issues

Partnered Projects

- ✓ 300 block trees – received \$30,000 funding from the DURD – **City**
- ✓ Completed the “create a single downtown map for wayfinding, parking, attractions, and tourist information” (1.1.c. Master Plan) – **Tourism Alliance, DHI, CVB, Goodson Designs, Kevin League Photography, and Allegra Marketing Print and Mail**
- ✓ Printed and distributed over 2800 Free Downtown Helena Calendars – a 40% increase from the year before - **Kevin League Photography and Valley Bank**
- ✓ Holiday décor and upgrades - **Browline Property Services, City, and DHI**
- ✓ Moved office locations creating a community friendly co-working space – **Vigilante Shuttles, Community Crate, and Kevin League Photography**
- ✓ Graffiti abatement – **Clean Slate Group**
- ✓ 125 Streetscape flower baskets – **Chadwick Nursery**

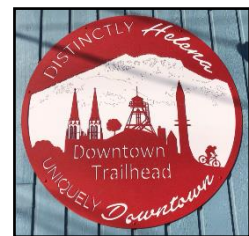
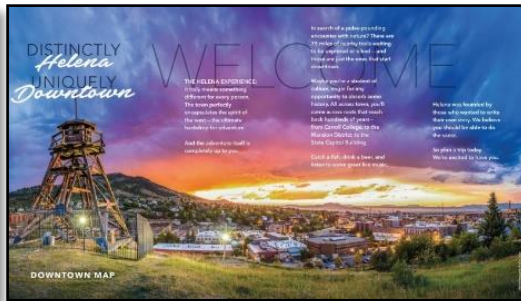


Photo Credit: Kevin League Photography



Photo Credit: Kevin League Photography

Programs and Services

The BID Board of Trustees hosts an annual retreat (February 9, 2021) to review polices, operations, and strategically plan for projects and services for the following year. Some of the projects are expected to be completed in the short term (up to 1-year), medium term (12 months to 24 months), or longer term (24 months or longer). Objectives listed below are the goals for FY22.

Table A. FY22 Objectives

Task/Project	Financial Contribution	Partners
Complete Assessment formula change	\$0	Committee of property owners
Holiday Décor Improvements & contract installation	\$8375	City and committee of self-interested individuals
Event Equipment	\$5500	
MOU with City on policy and operations relationship	\$0	
Streetscape beautification	\$19,625	City/contracted Services
Façade program	\$10,000	
Downtown Capital Improvement Plan	\$48,000 (\$64,500 partners and grants)	City/MBAC
Continued marketing with DHI	\$20,000	DHI
Graffiti program	\$10,000	Contracted services
Downtown banners	\$5,000	Contracted services
Summer flower program	\$23,000	Contracted services
Parklet program	\$2000	City (new in 2021)

As part of our key powers (2., 3., and 5. as stated under organization summary), the BID's streetscape and beautification efforts include services of 23 trash receptacles, hanging 125 flower baskets on cobra and decorative light poles, landscaping bulb outs (curb flower beds) along the 300 and 400 blocks, hanging approximately 150 summer and 150 winter banners including a banner program created in 2018 to allow businesses and events to promote their activities in the district, annual façade grant opportunities, hanging over 150 holiday decorations, and providing an equipment rental program for parades and events within a designated boundary. Under our contract for services with DHI, BID partners with DHI and assist with execution for promoting and advocating events in the district. Table B. breaks down the services and programs we provide.

Table B. Our Service Areas

Program / Service	Area
Trash = 23 receptacles	Park Ave (1) The BASECAMP (1) 6 th Ave (2) Fuller Ave (1) Lawrence St. (2) 14 th St (1) 15 th St (1) N Last Chance Gulch (1) 5-point intersection (1) God's Love (1) 300 block (6) 400 block (5)
Graffiti	District – working with Clean Slate Group and City on a long-term maintenance plan
Flower Baskets = 125	Cobra poles along Fuller Ave, N Last Chance Gulch, Neill Ave, Lawrence St, Great Northern Town Center, and 6 th Ave. Decorative light poles along the 300 and 400 blocks
Landscaping	11 planter beds along the 300 and 400 blocks
Banners	With roughly 145 cobra and decorative light poles, the banner program allows for businesses to choose “zones” in which they may purchase fly time (hang time). The BID maintains two sets of banners: summer and winter. The banners are changed out annually in the spring and fall.
Holiday Decorations	Approx. 150 strands of lights, 150 bows, and 150 garlands are wrapped around the cobra and decorative lights poles from N Last Chance Gulch to the Library, Park Ave., Neill Ave., Fuller Ave., and Sixth St. Lawn decorations throughout the downtown Downtown holiday tree (partnership with local Boy Scouts) Three trees 2019 and 2020 in Anchor Park

Montana Main Street Coordinator	To keep in good standing, we submit quarterly reports to Montana Main Street. In 2020, Helena was recognized as a top tier member in the Montana and National program and continues to maintain our organizational and revitalization benchmarks for top tier designation.
Façade Grant	Grants up to \$5000 per applicant on an annual basis. Program began in 2018. Applicants are required to be in the district and pay the assessment.
Equipment Rental	6ft. blue/red fence 8.5 ft. orange fence Sound System Stage Awning/ten Community Center/OWL Equipment rental is open to the public. DHI members receive a 25% discount.
Advocacy	Continue to be engaged in downtown community development while advocating for the business community and our property owners
Marketing	In 2019, BID worked with the Arcade Building to place a tv monitor in their window front to advertise and market happenings in the Downtown. BID and DHI have a joint marketing committee proving recommendations to the BID board for implementation.
Events	Assist Downtown Helena Inc. with execution of events albeit with event equipment, marketing, and/or planning. (Contract of Services and MOU)
Parklet Grant	In conjunction with the city's parklet application process, the BID is initiating a program in 2021 to assist applicants with funding costs.

Proposed FY22 Financials

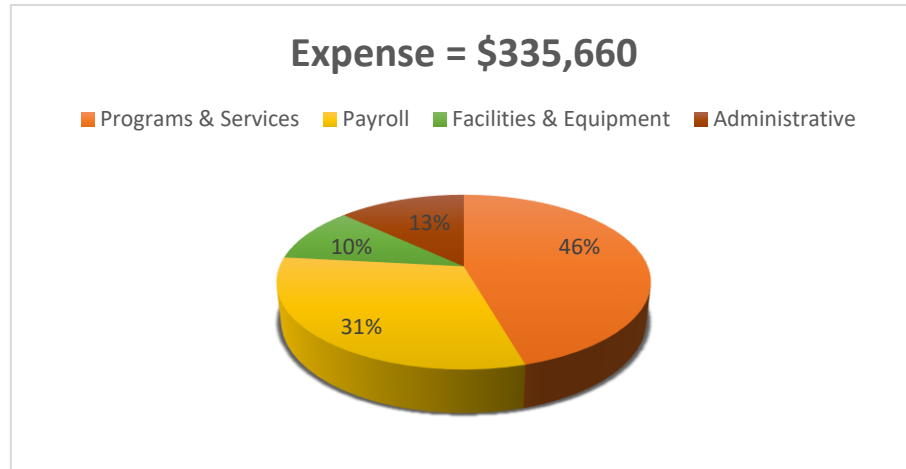
Projected income for FY22 is \$338,445. Projected expenses for FY22 are \$335,660. Our net income is projected at +\$2785.

During the creation process of 2019, property owners suggested an analysis of the assessment formula. From this request, an assessment ad hoc committee was formed. The committee includes two of our largest property owners, a non-profit owner, and three trustees of the board. It has been determined any recommendations to a levy change may occur for FY23 and staff are working with city staff on the potential changes.



For FY22, the board is recommending the same assessment as FY21. (Section 7-12-1133, MCA). The City finance team has calculated our expected income using approximately 430 parcels: 225 condo, 150 private, 40 public, and 16 vacant.

Chart A. Expense - \$335,660



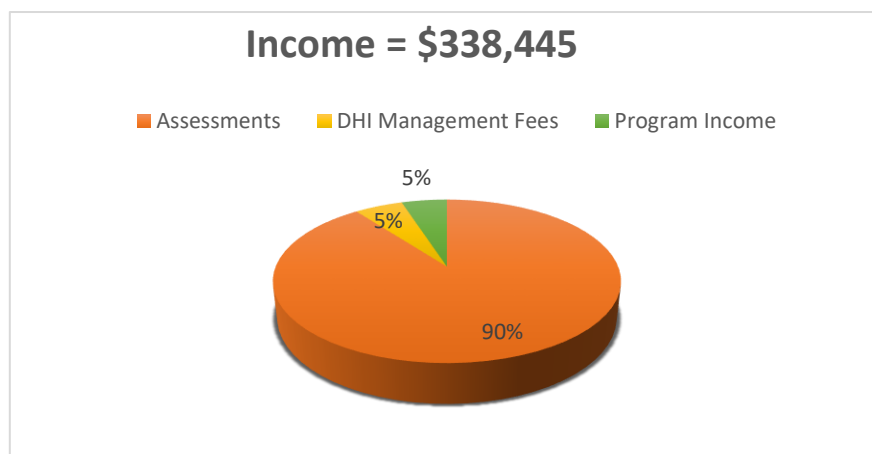
Administrative = 13% | \$43,850

Facilities & Equipment = 10% | \$34,260

Payroll = 31% | \$104,700

Programs and Services = 46% | \$152,850

Chart B. Income - \$338,445



Assessments = 90% | \$302,945

DHI Management Fee = 5% | \$18,000

Program Income = 5% | \$17,000



Table C. Assessment Recommendation

Private Property	Flat Rate	Square Ft.	Taxable Value
For each lot, tract or parcel, or group of lots, tracts or parcels aggregated for a single residential or commercial use, including accessory parking, and owned privately. Excluded from the assessment are lots, tracts, or parcels that are vacant with no habitable improvements and not used for commercial purposes.	\$425	\$0.03	3%

Public Property	Flat Rate	Square Ft.	Taxable Value
For each lot, tract or parcel, or group of lots, tracts or parcels aggregated for a single use, including accessory parking, and owned by a public entity, such as federal, state, county, city, school district and quasi-public entities Excluded from the assessment public properties that are vacant with no habitable improvements and public parks and squares.	\$425	\$0	\$0

The Team

Board of Trustees - Trustees serve terms of four years and may serve two consecutive terms



John Grant • 513-1122
Jackson, Murdo & Grant, PC
jgrant@jmgm.com
Term: 10/31/22 – 1st term

Why did you choose to sit on the board in a volunteer capacity?

I believe it is a civic duty to serve on worthy boards. Originally, I applied because of the seat on the Parking Commission.

What do you love most about Downtown Helena?

The small-town atmosphere. It is safe, friendly, and walkable.

What is your affiliation to downtown?

Home is in the Great Northern. Office is by the Courthouse.



Jake Heaton • 449-2847
Allegra Marketing, Print & Web
jake@allegrahelena.com
Term: 10/31/23 – 1st term

Why did you choose to sit on the board in a volunteer capacity?

I wanted to be on the board because I want to continue to help the businesses and culture of downtown Helena thrive. The downtown area is such a great part of our community that ties so many people together and it is important that we continue to invest in this part of our community.

What do you love most about Downtown Helena?

I love the diversity of our downtown. There is such a great blend of history, arts, recreation, shopping, and entertainment all within walking distance of each other. I love being able to walk from work to stores, restaurants, or the trail system so easily.

What is your affiliation to downtown?

I work at Allegra Marketing/Print/Mail, an anchor Downtown Helena business that supports so many other Downtown Helena businesses, nonprofits, and organizations.



Al Roy • 443-6473
Awards & Specialties Trophy Case
info@awardsmt.com
Term: 10/31/23 – 1st term
Elected Vice-Chair February 2021

Why did you choose to sit on the board in a volunteer capacity?

Helena business improvement district has made impressive impact recently and being a part of future polices and new growth directing the districts future is why I chose to sit on the board again. I can give back to my community and help keep small businesses thriving.

What do you love most about Downtown Helena?

The district is where it all happens, parades, pedestrian mall, cafes, music, shopping, historic, and friendly. There is always something going on in the downtown.

What is your affiliation to downtown?

I have been doing business in downtown Helena for three decades. I own properties.



Mark Roylance
Mosaic Architecture
markr@mosaicarch.com
Term: 10/31/22 – 2nd term

Why did you choose to sit on the board in a volunteer capacity?

I joined the board to help Downtown Helena realize its potential and was fortunate to have started my tenure at the beginning of the Downtown Master Planning process.

What do you love most about Downtown Helena?

I have lived all over the Northwest, but Helena struck me as special the first time I saw it. The mashup of impressive historic architecture and rugged topography gives Helena's downtown a rich and fascinating character, not to mention unequalled access to a remarkable trail system.

What is your affiliation to Downtown?

I am an architect with Mosaic Architecture, and I am passionate about vibrant urban places.



Rex Seeley • 443-4119
Montana Outdoor Sports
rexseeley@hotmail.com
Term: 10/31/24 – 2nd term
Elected Chair February 2021

Why did you choose to sit on the board in a volunteer capacity?

I joined to ensure the assessment was being spent wisely and used to promote downtown properties. I believe strong downtowns lead to a strong city.

What do you love most about Downtown Helena?

Growing up and currently, my family would shop downtown because of the variety and being able to interact with the business owners. Downtown is a fun place full of activity.

What is your affiliation to Downtown?

I have businesses and properties downtown.



Lee Shubert • 410-935-1440
Resident, Placer Condos
lwsfcclaw@gmail.com
Term: 10/31/21 – 1st term

Why did you choose to sit on the board in a volunteer capacity?

As a downtown resident I have, and have had, an abiding interest in the success, development, and preservation of Helena's historic downtown.

What do you love most about Downtown Helena?

The convenience. Living in the Placer Center, my wife and I can walk to many of the entertainment venues and restaurants in the area.

What is your affiliation to Downtown?

In addition to my residence, my son-in-law operates The BaseCamp.



Ryan Stavnes • 465-3038
Exit Realty of Helena
ryan@exitrealtyhelena.com
Term: 10/31/24 – 2nd term

Why did you choose to sit on the board in a volunteer capacity?

I choose to be on the Business Improvement District board in a volunteer capacity as it's a great way to lead by example. We have such a great Downtown area, and I love to see the progress made and the steps to make it improve even more.

What do you love most about Downtown Helena?

I love the spirit of Downtown Helena, and there is a great potential for those to live, work and recreate in our micropolitan-style of Downtown.

What is your affiliation to downtown?

I am in the real estate profession, and live and work downtown. It is so nice having many things within close walking distance, everything from entertainment, food and beverage, the arts, and wonderful residential options too.

Assigned Committee Appointments

Executive Committee – empowered by the Trustees to oversee actions of the board and act between meetings in matters that require immediate action and do not involve major questions of policy or funding. *Rex Seeley and Al Roy*

Streetscape Committee – charged with overseeing the programs that make Downtown Helena a beautiful, clean, and safe place to visit including but not limited to landscaping, cleanliness, public infrastructure maintenance and improvements, and signage. *Jake Heaton, Mark Roylance, and Lee Shubert*

Joint Marketing Committee - works with the executive director to create an annual marketing plan which sets forth the marketing efforts employed to 1) showcase the HBID's return on investment to its rate payers and 2) showcase a cohesive and consistent downtown image and brand to locals and tourists. *Jake Heaton and Ryan Stavnes (Sarah Hamblock and Chelsia Rice from DHI)*

Organizational Committee - an ad hoc committee that reviews areas of governance. *Al Roy and Lee Shubert*

Assessment Committee – an ad hoc committee charged with reviewing the assessment formula. *Mark Roylance, Rex Seeley, and Lee Shubert*

Holiday Decoration Committee – an ad hoc committee charged with ideas to enhance downtown holiday décor. *Lee Shubert, Mark Roylance, and Jake Heaton*

Staff



Micky Zurcher
Executive Director
mzurcher@helenabid.com
Tenure: November 8th, 2017



Mike Rooney
Operations Director, DHI
mrooney@helenabid.com
Tenure: July 27th, 2020