



City of Helena

ADMINISTRATIVE MEETING

June 1, 2022 - 4:00 PM

Commission Chambers, Room 330 / Zoom Online Meeting: <https://zoom.us/j/91625186917>

AGENDA

1. **Call to Work Session, introductions**
2. **Commission comments, questions**
3. **Recommendations from the Helena Citizens Council**
4. **City Manager's Report**
 - a. Capital Improvement Plan Discussion
5. **Information Only**
 - a. Community Development Department presentation on the Downtown TIF Advisory Board's recommended FY23 Work Plan and application update.
 - b. Railroad District Neighborhood Plan
 - c. Information Only Overview on the Operations of the Integrated Solid Waste Management System between the City of Helena and Lewis and Clark County, and how the System is Currently Funded
6. **Commission Comments, Questions**
7. **Public Comment**
8. **Adjourn**

The City of Helena is committed to providing access to persons with disabilities for its meetings, in compliance with Title II of the Americans with Disabilities Act and the Montana Human Rights Act. The City will not exclude persons with disabilities from participation at its meetings or otherwise deny them the City's services, programs, or activities.

Persons with disabilities requiring accommodations to participate in the City's meetings, services, programs, or activities should contact the City's ADA Coordinator, Ellie Ray, as soon as possible to allow sufficient time to arrange for the requested accommodation, at any of the following:

Phone: (406) 447- 8490

TTY Relay Service 1-800-253-4091 or 711

Email: citycommunitydevelopment@helenamt.gov

Mailing Address & Physical Location: 316 North Park Avenue, Room 445, Helena, MT 59623.

City of Helena, Montana

May 25, 2022

To: Mayor Collins and the Helena City Commission

From: Ellie Ray, Planner II/Grants Coordinator
Chris Brink, Community Development Director

Subject: Community Development Department presentation on the Downtown TIF Advisory Board's recommended FY23 Work Plan and application update.

Present Situation:

As part of the role of the Downtown TIF Advisory Board, members are tasked with making recommendations on an annual work plan and budgets, the allocation of TIF funds, and making any amendments to the URD Plan or the district boundaries. In alignment with these duties, the board held meetings beginning in January 2022 to review the goals and objectives of the Downtown Urban Renewal District Plan to inform a work plan for FY23. In the course of their discussions, the board ranked each stated objective and assigned a priority and timeframe for anticipated completion of each item. These discussions culminated in a unanimous vote to recommend approval of a district Work Plan for FY23 at their April 14, 2022 board meeting.

The current recommended priority areas for funding as proposed by the board include: (1) infrastructure improvements; (2) site redevelopment and public space activation; (3) affordable housing creation and retention; (4) façade improvements; (5) marketing and branding activities; (5) Cruse Avenue redevelopment activities; and (6) Rodney Street commercial center improvement projects. The board recommends that each of these priority areas be weighted equally when considering project funding.

During the April 14, 2022 meeting, the Board also unanimously voted to recommend approval for the institution of tiered match funding requirements that are reflected in the revised funding application form. The Board recommends that applicants may request up to fifty percent match (50%) funding for projects exceeding \$10,000 or up to twenty-five percent match (25%) for projects equal to or less than \$10,000. Since the inception of the Board in the spring of 2020, no such match funding requirement has existed, and it is hoped that this new requirement will afford more certainty for applicants in assembling project capital stacking and create more parity amongst applicants while also allowing for funding of more applicants altogether. Currently, the Board does not recommend applying a cap on TIF funding requests.

The Downtown TIF Advisory Board recommendations must be approved by the City Commission prior to being implemented. Once approved, it is the intent of the Advisory Board that they will solicit applications for funding on eligible projects that serve a public purpose on a biannual basis, prioritizing the applications submitted related to the stated priority areas for funding. The Downtown TIF Advisory Board recommendations will then be forwarded to the City Commission for approval as in earlier instances. Based on the response for the request for applications and changes in circumstances, the board may recommend changes to the work plan on a routine basis or as needed.

Proposal/Objective: Presentation is being made for informational purposes only ahead of the item moving forward as a Consent Agenda item at the June 6, 2022 Regular Meeting.

Notice of Public Hearing: N/A

ATTACHMENTS:

- ▢ [DURD FY23 Work Plan](#)
- ▢ [DURD TIF Application Form](#)
- ▢ [DURD TIF Advisory Board Meeting Minutes, 4/14/22](#)



DOWNTOWN URBAN RENEWAL DISTRICT WORK PLAN, MAY 2022

Funding Accruals

Limited funding is currently available for projects in the Downtown Urban Renewal TIF District, not inclusive of any outstanding taxes that remain to be paid for May 2022

Prioritized Projects

The Downtown Urban Renewal District TIF Advisory Board recommends that applicants may request up to fifty percent match (50%) funding for projects exceeding \$10,000 or up to twenty-five percent match (25%) for projects equal to or less than \$10,000. Additionally, the board recommends the following development program prioritizations for FY2023, and seeks to solicit applications based on these priorities:

- **Infrastructure Improvement Program** → Grants awards may be made for projects that identify and prioritize upgrades to water, sewer, stormwater drainage infrastructure, and vehicular and pedestrian/bike transportation improvements as well as increasing fiber optic capability.
- **Site Redevelopment & Public Space Activation Program** → Grant awards may be made for redevelopment of underutilized or underperforming properties, adaptive reuse of existing structures, demolition activities, or improvements to property aesthetics through enhanced lighting, landscaping, public art, or other creative means to better activates public-facing spaces.
- **DURD Housing Program** → Grant awards may be made for projects that create or retain affordable housing opportunities.
- **Façade Improvement Program** → Approved applications would receive match funding toward the cost of the façade improvement projects that promote historic preservation and/or promote designs in keeping with the character of the district.
- **Marketing/Branding Project Program** → Grant awards may be made to establish a marketing and/or branding plan with a wayfinding component and an implementation strategy for the Downtown Urban Renewal District.
- **Cruse Avenue Redevelopment Program** → Grant awards may be made to study and implement activities addressing parcel surveying, the future surplus of city-owned property, and infrastructure planning for the Cruse Avenue right-of-way to pave the way for redevelopment activities.
- **Rodney Street Commercial Center Program** → Grant awards may be made to reinvigorate the Rodney Street Commercial Center through gateway signage, infrastructural connectivity, and public art improvements.



Additionally Recognized Eligible Project Priorities

The DURD TIF Advisory Board, having ranked all Downtown Urban Renewal Plan projects and programs, recommends additional project and program activities as being eligible urban renewal projects for tax increment financing (“Additional Projects”). Although Additional Projects are eligible as urban renewal projects, such Additional Projects expressly are not recommended at this time for funding amounts and prioritization. The Additional Projects and Programs that may eligible for funding in the event additional tax increment funds become available are listed within the Project and Program Prioritization Table once the Work Plan is formally amended and solicitations are made for projects of that type and recommended for funding.



City of Helena
Downtown Urban Renewal District
TAX INCREMENT FINANCING APPLICATION FORM
Community Development Department
Phone (406) 447-8490 Fax (406) 447-8460
citycommunitydevelopment@helenamt.gov

IMPORTANT: APPLICANTS MAY REQUEST UP TO FIFTY PERCENT MATCH (50%) FUNDING FOR PROJECTS EXCEEDING \$10,000 OR UP TO TWENTY-FIVE PERCENT MATCH (25%) FOR PROJECTS EQUAL TO OR LESS THAN \$10,000. COSTS TO BE PAID WITH DOWNTOWN URBAN RENEWAL DISTRICT FUNDS MAY NOT BE INCURRED BY THE APPLICANT PRIOR TO FUNDING APPROVAL AND THE SATISFACTION OF ANY CONDITIONS OF SUCH APPROVAL.

CITY STAFF RESERVE THE RIGHT TO RETURN MATERIALS THAT ARE DEEMED INCOMPLETE OR LACK SUFFICIENT SUPPORTING DOCUMENTATION.

ANYONE SEEKING TIF ASSISTANCE FROM THE CITY OF HELENA MUST SUBMIT A WRITTEN APPLICATION FOR EACH TIF-ASSISTED PROJECT. THE FOLLOWING PROCEDURE HAS BEEN DEVELOPED TO EXPEDITE THE REVIEW OF TIF FUNDING REQUESTS.

1. Initial Contact: Contact the City of Helena Community Development Department, 316 N. Park Avenue, Room 445, Helena, MT 59623, (406) 447-8490, citycommunitydevelopment@helenamt.gov, to discuss the project and determine eligibility for TIF assistance.
2. Prepare a Written Application: The Applicant must prepare a written application for each funding request. The City of Helena staff will assist the applicant with any questions in the preparation of the application. The application should address the questions posed in the Project Narrative section.
3. Staff Review: Upon submittal of all necessary information, City staff will review the merits of the project and the need for funding. At any point in the review process, the staff or Board may request more information of the Applicant or solicit comment on the project from other public agencies. Items included in personal financial statements will not be subject to public review or presentation to or comment by other agencies.
4. Board Review and Approval: The DURD TIF Advisory Board will review the project and staff recommendations, and then recommend the funding request or any part thereof, and any special terms of TIF assistance to the City Commission.
5. Development Agreement: The City of Helena and the Applicant must execute a legally binding contract, which establishes the terms and conditions of the TIF assistance.

CHECKLIST ITEMS

- ☐ Project Description
- ☐ Project Renderings (where applicable)
- ☐ Application Form (pages 4-6)
- ☐ Project Financing Worksheet (page 7)
- ☐ Project Narrative Section (page 9)



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APPLICATION PRIORITY AREAS FOR TIF ASSISTANCE

TIF Applications will be assessed based on the merits of individual projects in relation to the goals and objectives of the Plan, and the project priority areas set by the DURD TIF Advisory Board, which are as follows:

1. Infrastructure Improvement Program: Consideration will be given for projects that identify and prioritize upgrades to water, sewer, stormwater drainage infrastructure, and vehicular and pedestrian/bike transportation improvements as well as increasing fiber optic capability.
2. Site Redevelopment & Public Space Activation Program: Consideration will be given for redevelopment of underutilized or underperforming properties, adaptive reuse of existing structures, demolition activities, or improvements to property aesthetics through enhanced lighting, landscaping, public art, or other creative means to better activates public-facing spaces.
3. DURD Housing Program: Consideration will be given for projects that create or retain affordable housing opportunities.
4. Facade Improvement Program: Consideration will be given for facade improvement projects that promote historic preservation and/or promote designs in keeping with the character of the district.
5. Marketing/Branding Project Program: Consideration will be given for projects establishing a marketing and/or branding plan with a wayfinding component and an implementation strategy for the Downtown Urban Renewal District.
6. Cruse Avenue Redevelopment Program: Consideration will be given for projects that study and implement activities addressing parcel surveying, the future surplus of city-owned property, and infrastructure planning for the Cruse Avenue right-of-way to pave the way for redevelopment activities.
7. Rodney Street Commercial Center Program: Consideration will be given for projects that reinvigorate the Rodney Street Commercial Center through gateway signage, infrastructural connectivity, and public art improvements.



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APPLICATION PRIORITY AREAS FOR TIF ASSISTANCE

Applications will be evaluated based on the following measurable objectives for projects and programs (listed in no particular order of priority):

1. Increased Taxable Valuation: Implementation of the project should encourage and/or result in an increase in the URD's tax base.
2. Relationship of Public and Private Investment: The relationship of private investment to public investment of a project shall be significant enough ensure prudent investment of public funds within the urban renewal district.
3. Job Creation: Projects that create opportunities for new employment contribute to the economic vitality of the District and community in a variety of ways.
4. Investment Spin-off: Projects that have the potential for investment spin-off, yielding a positive impact on the District.
5. Cost-Benefit Analysis of the Investment/Expenditure: Analysis of how the request cost of the TIF funds compares with the benefits of the project to the District.
6. Health and Safety Concerns: The Project's impact, positive or negative, on the environment in terms of noise, dust, pollution, public safety, traffic congestion, pedestrian access, visual aesthetics, etc.
7. Historic Preservation: The Project's capacity to encourage the preservation and protection of the cultural and economic heritage and physical assets of the District.
8. Density, Infill, and Adaptive Reuse: Projects will be evaluated for their ability to encourage or result in infill and adaptive reuse of underutilized and vacant lots and properties, and to promote more compatible, complementary uses within the District.
9. Cost of Public Services: The Project's ability to improve public services, such as water, sewer, sidewalks, parking, improved traffic circulation, etc., to an area that is currently underserved.
10. Housing Component: Projects that promote all types of housing in the area in conformance with the Downtown Neighborhood Plan and the Downtown URD Plan.
11. Conformance with the goals and objectives of the Railroad URD Plan, 2019 City of Helena Growth Policy, and the Downtown Neighborhood Plan: The Project's ability to significantly further specific goals found in the current Urban Renewal Plan, Growth Policy, and consistency with other City plans and objectives.
12. Conformance with Requirements for TIF Fund Expenditures, per 7-15-4288, MCA: Projects must cover eligible project activities stated in Montana statutes and be approved by the City Commission to satisfy needs identified in the Railroad Urban Renewal District Plan.



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Project Name: _____ Date Submitted: _____

APPLICANT INFORMATION

Name (First & Last): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Cell: _____ Other: _____

Email: _____

If the applicant is not an individual doing business under his/her own name, the applicant has the status indicated below and is organized or operating under the laws of: State of Montana

- ☐ A non-profit or charitable institution/corporation
☐ A partnership or corporate entity known as _____
☐ District Resident
☐ Local Government
☐ Other (explain) _____

PROJECT INFORMATION

Building Address: _____

Legal Description: _____

PROPERTY OWNER INFORMATION

If the property is not owned by the Applicant, written permission from the owner must be included to carry out the project and lease or other materials.

Property Owner (First & Last): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Cell: _____ Other: _____

Email: _____



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PROJECT ARCHITECTURAL FIRM INFORMATION (WHERE APPLICABLE)

Company/Firm: _____
Point of Contact (First & Last): _____
Address: _____
City: _____ State: _____ Zip Code: _____
Phone: _____ Cell: _____ Other: _____
Email: _____

PROJECT FINANCIAL LENDING INSTITUTION (WHERE APPLICABLE)

Company/Institution: _____
Point of Contact (First & Last): _____
Address: _____
City: _____ State: _____ Zip Code: _____
Phone: _____ Cell: _____ Other: _____
Email: _____

PROJECT CONTRACTOR INFORMATION (WHERE APPLICABLE)

Company/Firm: _____
Point of Contact (First & Last): _____
Address: _____
City: _____ State: _____ Zip Code: _____
Phone: _____ Cell: _____ Other: _____
Email: _____

DESCRIPTION OF PROJECT

In a separate attachment, please provide a full written description of your project. Please indicate if the items are existing or new construction.

PROJECT RENDERINGS (IF APPLICABLE)

Submit design schematic and/or site and landscaping plans for project.



TOTAL COST OF THE PROJECT

Please summarize. A full breakdown of costs is required on the *Project Cost Worksheet*.

PROPERTY OWNERSHIP

Do you own the property or are you currently purchasing it? Explain.

JOB CREATION

Will there be any new permanent or part time jobs as a result of this project excluding construction jobs associated with the development of the project? If so, how many?

PROJECT COMPLETION

What is the expected completion date of the project?

PROPERTY TAXES

How much are the current annual property taxes including any improvements? Is the payment of taxes current?



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PROJECT COST & FINANCING SECTION

Summarize the project costs on the Project Cost Worksheet. Use general categories and include items that are in the assistance request. The total cost should include land costs and “soft costs” such as zoning processes, surveys, and permits to enable the DURD Advisory Board to evaluate the entire private investment. If in doubt about an item's eligibility, include it. Staff will review the items and help determine eligibility. Briefly describe how the project will be financed and be sure to include equity and other investments into the project. If financing commitment is contingent on grants or URD TIF commitment to the project, has multiple sources, or other complex factors, provide that information.

NOTE: The TIF Program requests which include demolition/deconstruction activities, public sidewalks, streets, alleys and other right-of-way improvements; and/or work on utility main transmission lines totaling over \$25,000 are subject to Montana Prevailing Wage Rates and must include that in the itemized costs.

PROJECT COST WORKSHEET

Professional Services

1. _____	\$ _____
2. _____	\$ _____
	Subtotal \$ _____

Construction/Rehabilitation Costs

1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
	Subtotal \$ _____

Printing, Advertising, etc.

1. _____	\$ _____
2. _____	\$ _____
	Subtotal \$ _____

Other Miscellaneous Costs

1. _____	\$ _____
2. _____	\$ _____
	Subtotal \$ _____

TOTAL PROJECT DEVELOPMENT COSTS

Total \$ _____



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PROJECT FINANCING WORKSHEET

Owner/Developer Investment

Total applicant investment in the project \$ _____

Listing of Other Funding Sources & Amounts (Continue on separate sheet if needed)

1. _____ \$ _____
2. _____ \$ _____
3. _____ \$ _____

Request for Eligible items

Total TIF Request \$ _____

TOTAL PROJECT FINANCING \$ _____



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PROJECT NARRATIVES SECTION:

1. **Description of Project.** Provide a written description of the project, scope of work if a marketing plan or similar plan, number, and types of jobs to be created, etc.
 - a. Compliance with the Downtown URD Plan: Identify how your project supports the Downtown URD Plan and how the project benefits the neighborhood, URD, and community (See Attachment B for Goals and objectives of the Plan).
 - b. Local Zoning and Other Requirements: All projects assisted by Downtown URD TIF funds must, depending on the project location, comply with the City's Zoning Requirements, provide a brief narrative as to how the design successfully meets the requirements of City Zoning. Include any project schematic, site, and landscaping plans.
 - c. Demolition/Deconstruction: If the project request includes removal of structures, it must be done in accordance with to the provisions of Helena City Code Title 3 Chapter 15. Provide a brief narrative on how the building will be removed and whether it is a structure within the city that is individually listed on the National Register of Historic Places, or a property located within the city's historic districts which is designated by the state historic preservation office (SHPO) as primary or contributing.
 - d. Dislocation: If existing tenants are to be dislocated as a result of the project, provide a separate narrative describing how they have been or will be appropriately relocated.
2. **Logistical Considerations.** Provide a brief narrative describing the following:
 - a. Project Feasibility: The Applicant's demonstration of financial readiness and ability to proceed.
 - b. Applicant's Ability to Perform: The Applicant's capability to undertake the relative complexities of the project.
 - c. Timely Completion: The feasibility of completing the project according to the Applicant's proposed project schedule.
 - d. Payment of Taxes: All property taxes, special improvement district assessments, and other assessments on the project property must be paid to date, where applicable.



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PROJECT NARRATIVES SECTION (CONTINUED):

3. Economic & Community Development Potential: Provide a brief narrative for the following. If not applicable, please note:

- a. Tax generation: Describe how the project will increase the taxable valuation in the District.
- b. Relationship of Public and Private Investment: Describe the relationship of private investment to public investment of a project and discuss how it is a prudent investment of public funds within the urban renewal district.
- c. Job Creation: Are there any jobs created as a result of the project? Please describe.
- d. Investment Spin-off: Describe any potential for investment spin-off having a positive impact on the District.
- e. Cost-Benefit Analysis of the Investment/Expenditure: For projects that are \$10,000 or more, a cost-benefit analysis should be completed.
- f. Health and Safety Concerns: Describe the project's impact, positive or negative, on the environment in terms of noise, dust, pollution, public safety, traffic congestion, pedestrian access, visual aesthetics, etc.
- g. Historic Preservation: Describe the project's ability to preserve and protect the cultural and economic heritage and physical assets of the district.
- h. Density, Infill, and Adaptive Reuse: Describe if the project increases density in the DURD through infill and adaptive reuse of existing property(s).
- i. Cost of Public Services: Describe how the projects will improve public services such as water, sewer, sidewalks parking, improved traffic circulation, etc., to an area currently underserved.
- j. Housing Component: Describe any housing components to the project. One of the main goals of the Downtown Neighborhood Plan and the Downtown URD Plan is to promote all types of housing in the area.
- k. Conformance with Requirements for TIF Fund Expenditures, per 7-15-4288, MCA: Projects must cover eligible project activities stated in Montana state statutes (See Attachment A).

ATTACHMENT A: ELIGIBLE ACTIVITIES

As specified by state law, TIF may be used to finance redevelopment activities including the following (from 7-15-4288, M.C.A.):

1. Land acquisition, including acquisition of infrastructure-deficient areas and assemblage of land for development or redevelopment by private enterprise or public agencies, including sale, initial leasing, or retention by the municipality itself at fair value.
2. Demolition and removal of structures.
3. Relocation of occupants.
4. The acquisition, construction, and improvement of public improvements or infrastructure, including streets, roads, curbs, gutters, sidewalks, pedestrian malls, alleys, parking lots and off-street parking facilities, sewers, sewer lines, sewage treatment facilities, storm sewers, waterlines, waterways, water treatment facilities, natural gas lines, electrical lines, telecommunications lines, rail lines, rail spurs, bridges, publicly owned buildings, and any public improvements, and items of personal property to be used in connection with improvements for which the foregoing costs may be incurred.
5. Costs incurred in the exercise of urban renewal powers (found in 7-15-4233, MCA), including urban renewal projects as authorized by the City Commission.
6. Acquisition of infrastructure-deficient areas or portions of areas;
7. Administrative costs associated with the management of the urban renewal area or targeted economic development district;
8. Assemblage of land for development or redevelopment by private enterprise or public agencies, including sale, initial leasing, or retention by the local government itself at its fair value;
9. The compilation and analysis of pertinent information required to adequately determine the needs of the urban renewal area or targeted economic development district;
10. The connection of the urban renewal area or targeted economic development district to existing infrastructure outside the area or district;
11. The provision of direct assistance to secondary value-adding industries to assist in meeting their infrastructure and land needs within the area or district; and
12. The acquisition, construction, or improvement of facilities or equipment for reducing, preventing, abating, or eliminating pollution.

ATTACHMENT B: GOALS OF THE DOWNTOWN URD

- **Add to downtown vibrancy with a mix of uses**
 - Provide a range of housing for a range on incomes
 - Attract new business types that support residential uses
 - Encourage new business startups
 - Conduct feasibility, market, and other studies
 - Encourage ground floor active use
 - Add to improve urban landscaping with public art, trees, and planting
- **Upgrade Underperforming properties**
 - Develop vacant lots and encourage upgrades to under-performing property gaps
 - Encourage the update and adaptive re-use of buildings for 21st century needs, such as open interiors, improvements to broadband, and for safety and market competitiveness
 - Encourage redevelopment of parking facilities that create gaps in downtown ground-floor retail by allowing for non-parking uses on floor level and parking on other stories
 - Facilitate façade improvements
 - Inventory city properties with potential for higher use and develop criteria for disposition
 - Provide for demolition and site preparation as needed to upgrade properties
- **Invest in infrastructure needed for development**
 - Improve transportation infrastructure for better function and safety for vehicles, pedestrians and bicycles and include street scape features to improve aesthetics, safety, and quality for non-motorists
 - Rectify issues of parcels along and within streets that were not properly surveyed
 - Address improvement needed for fire suppression water flow requirements for higher densities; improve fire engine access and prioritize replacement of older segments of pipe for water and sewer
 - Facilitate storm drainage, and continue to address capacity issues and alternative detention features
 - Expand Fiber capability
 - Invest in capital improvements needed for parks and open spaces
 - Manage parking for optimal efficiency and unitization
 - Retain and address needs of existing city-owned cultural and historic facilities
- **Improve Transit, Pedestrian and Bike Connections**
 - Improve pedestrian and bike facilities
 - Develop a comprehensive bike network
 - Improve vehicle circulation and access to increase retail viability
 - Improve gateways and wayfinding
 - Increase transit options
 - Improve pedestrian connections from parking facilities to destination
- **Create a quality and unique experience**
 - Make improvements to attract more businesses
 - Encourage ground-floor transparency
 - Capitalize on downtown's historic assets

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ATTACHMENT B: GOALS OF THE DOWNTOWN URD (CONTINUED)
<ul style="list-style-type: none">• Stimulate Vibrancy with a Mix of Uses (Rodney Street Goal)<ul style="list-style-type: none">○ Retain the neighborhood character allowing for mixed uses, a variety of residential types, and a central commercial area○ Keep the area primarily residential with a range of housing types intermixed with offices and government uses○ Increase residential capacity○ Retain the Rodney Street Commercial Center as the primary area for retail, with the potential for housing and offices in the upper floors
<ul style="list-style-type: none">• Reinvigorate the Rodney Street Commercial Center (Rodney Street Goal)<ul style="list-style-type: none">○ Retain and build the Neighborhood Center as the center for retail, commercial and social gathering○ Improve Rodney Street functionality, infrastructure and aesthetic between 6th and Broadway○ Create gateways with wayfinding at both ends of the commercial center○ Create better linkages between the courthouse complex, Myrna Loy center, and Rodney Street○ Incorporate public art that differentiates the area from Downtown tonto a fun and funky interactive way○ Monitor parking demand and identify potential for temporary uses or longer term uses

**Minutes
Downtown TIF Advisory Board Meeting
April 14, 2022, 10:00 a.m.
Via Zoom Meeting Platform**

Board Members Present:

Andy Shirliff, Chair
Brian Obert, Vice-Chair
Lee Shubert
Lori Ladas
Krys Holmes
Jennifer Deherrera
Tatum Curtis
Charlie Carson

Staff Present:

Ellie Ray, Planner II
April Sparks, Administrative Assistant

Non-Board Members:

Micky Zurcher, BID Director
HCTV

Member of the Board Absent:

Andrew Chananian
Nathan Bilyeu
Riley Tubbs

Call to Order:

(0:00:08) Chair Shirliff called the meeting to order, and introductions were made.

Minutes:

(0:01:08) Minutes from the January 13 and March 10, 2022, meetings were approved.

Budget Report:

(0:01:38) Ms. Ray presented a verbal budget update, stating nothing had changed since the last budget report, approximately \$113,000 is available, however as per previous discussion, there is a 10% set aside for Affordable Housing Projects will need to be taken out for this per resolution as it has not been set aside yet. Finance will be working on the exact amount of accruals and how much must be set aside. Chair Shirliff asked if that is 10% of what the district has now or of all accruals. Ms. Ray stated for all TIF districts it is going to be 10% of what has accrued since the passage of the resolution establishing the TIF district in November 2020, so there will need to be a retroactive set aside. Vice-Chair Obert asked if that will be getting caught up all at once or can it be set aside over several years. Ms. Ray replied that she will defer to Finance and the City Attorney's office on the process of setting aside those funds. Vice-Chair Obert noted that at the early stages of the TIF there is a struggle with the increment, and in later years the increment grows and then the 10% can be put back in and it would be less onerous on the TIF to allow for the set aside to happen that way than taking it all out now. Ms. Ray stated there is a possibility that the Board will get an application involving affordable housing sooner than that, so

under the letter of the law there is some uncertainty if that would work, but an inquiry can be made. Ms. Ray added that at some stage the Board will be moving the two applications for the Penwell building and Union Market building forward to the City Commission as they have been held up in the City Attorney's office to determine if these projects qualify as eligible expenses under the letter of the law, it does fall on the City Commission to make that determination and what type of precedent they want to set. Chair Shirliff stated that he was aware of a possible application coming in regarding the rebranding project for the City of Helena, asking for around \$30,000. Vice-Chair Obert stated that the board may want Ms. Zurcher to report on this as BID is spearheading this effort and went into more detail about the potential timeline of the project and request.

(0:07:44) Mr. Shubert added information about a recent report about a new EPA lead water pipe regulation that would relate to the Union Market application. Vice-Chair Obert stated that there are funds out there available for lead pipe removal. Ms. Ray asked Vice-Chair Obert from whom those funds are available. Vice-Chair Obert said he would look into it and get back to Ms. Ray.

Discussion on match requirements and funding caps:

(0:10:31) Chair Shirliff introduced the discussion topic and re-capped the subcommittee discussion. Ms. Ray stated that this had been discussed at the previous meeting and the consensus was that the Board would move forward with requiring those matches and that later remove that requirement once the TIF starts building its increment. If the members present would like to recommend that requirement moves forward to the City Commission along with the work plan, that can happen. Once the change is made the website and application can be changed to reflect the requirement ahead of the July application window. Chair Shirliff asked for discussion or a motion. Ms. Holmes asked if there was wording for a motion. Ms. Ray stated the Board can come up with the wording for a motion now, and that there was not one prepared and invited the Board to draft language. Ms. Ray invited the Board to also speak about any possible funding caps they would like to institute.

(0:14:40) Chair Shirliff asked how the March discussion went regarding a cap, and stated he felt it was a way to extend the life of the fund. He stated he felt it important to do this before applications started coming in for the July allocation. He listed some of his reasoning and asked Ms. Ray about the options. Ms. Ray stated there needs to be a determination to forward to the Commission, but everyone seemed to be in agreement that they are happy to entertain a 50% match agreement, and it was reiterated that the work plan is not static and can be changed.

(0:17:48) Ms. Holmes made a motion to require a 50% match for all applications over \$10,000 and a 25% match for applications under \$10,000. Mr. Curtis seconded the motion. Mr. Carson stated that he liked that motion but asked if there were any legal implications. Ms. Ray stated that she did not think that there were any legal implications and that the Board may want to discuss their rationale. Mr. Carson stated he understood the rationale for the 25% match being a small-time guy himself, and it helps the smaller guy because he doesn't have

as much money. Chair SHirtliff stated when he thinks of a project under \$10,000, he thinks of a mural or art installation, and it seems fair to have something under \$10,000 need to pay a quarter of that. He asked if any of the other Board members have had experience with a match. Vice-Chair Obert stated that this is something he has heard of and going back to what Ms. Ray stated, if the Board explains their rationale behind the decision the Board should be able to get this to pass. Ms. Ray stated that she agrees with Vice-Chair Obert that if the Board states why they think this is reasonable there should not be any legal issues.

(0:21:27) Chair Shirliff asked Mr. Shubert if he had any thoughts to add to the discussion. Mr. Shubert stated he doesn't have anything to add, but that he has been party to discussions about the possibility to re-pave the pedestrian mall, and at the BID they have had discussions about how to address the funding for the improvement, he brings that up because of the proposed 50% match, and further spoke about possible sources of funding, and questioned the implications of the match requirements on plans like that. Ms. Ray stated that with that particular project, there is a capital improvement plan for the Downtown and what Mr. Shubert was talking about might be dovetailing with that effort, but to hold off on any such thing until that plan is completed. Mr. Shubert stated that the project is being thought of for years from now. Ms. Zurcher stated one of the strategic goals for the BID for FY23 is to do a master plan just for the pedestrian mall and sees the CIP being a precursor to master plan and might not come forward for two years, but that these discussions should be had as it could become a priority for the city. Ms. Ray stated that similar to sidewalk improvements that happened in the Railroad district, this could possibly be partially funded via TIF funds, but there were also allocations set aside from the city's budget. Mr. Shubert stated that the project is a long-term idea. Ms. DeHerrera asked if there is a clause that can be added for situations like the project Mr. Shubert spoke about. Ms. Ray pointed to the workplan and that the board could use it to create exceptions for things like infrastructure projects.

(0:26:43) Ms. DeHerrera stated she would like to add something that the TIF Board would like to add something to the motion that the Board can change the match depending on situations. Ms. Ray said that was discussed previously and that more people were inclined to make it a straight 50% to make it a level playing field, and it is up to the Board to make a recommendation to the Commission and that the Commission can approve whatever they choose. Mr. Shubert stated that the proposals and restrictions can be modified [regarding the workplan]. Ms. Ray stated that is correct and as Vice-Chair Obert noted as the TIF increment grows that Board may be able to begin bonding and exploring other types of projects and having the match requirement will not be as important. Chair SHirtliff also stated that with the walking mall, it is a city park so there are funds there and that it may be a great opportunity for a public/private partnership and the TIF fund may be part of the funding package. Chair SHirtliff also stated that it is nice to know that the fund is flexible to accommodate projects that are of higher importance regarding the workplan. Chair SHirtliff asked if there was any additional discussion about the motion on the table.

(0:30:40) Mr. Shubert suggested that the Board move forward with the motion but if it turns out to be detrimental to the Board, it can be modified later. Chair Shirtliff restated the motion and asked for a vote. Ms. Holmes asked to amend the motion to require a 50% match for all applications over \$10,000 and a 25% match for applications up to \$10,000. Mr. Shubert stated that this motion makes sense to him. Mr. Shubert seconded the motion. A vote was taken. The motion passed unanimously.

(0:34:55) Ms. Ray stated that to help her finalize some of the wording in the workplan, she asked if anyone had any final thoughts. Mr. Shubert stated considering the discussion there may need to be some rewording done. Ms. Ray stated that was correct and outlined the wording she would be using to provide flexibility to the Board.

Public Comment:

(0:38:17) Ms. Zurcher gave the Board an update on the 300 Block tree project, and that 5 of the 7 electrical boxes were completed, and the other 2 will be completed shortly. The grates are in Great Falls, and will be installed shortly, and the hope is that the project is completed before the end of this fiscal year.

Next Meeting:

(0:39:25) The next Downtown TIF Advisory Board meeting is scheduled for May 12, 2022. Ms. Ray noted that she will have a memo to present to the Board from the City Attorney's office on the applications that were subject to review for qualified expenses.

Adjournment:

(0:41:19) With no further business before the Board, the meeting adjourned around 11:00 a.m.

City of Helena, Montana

May 26, 2022

To: Mayor Collins and the Helena City Commission

From: Christopher Brink - Community Development Director
Michael McConnell - Planner II
Michael Alvarez - Planner II

Subject: Railroad District Neighborhood Plan

Present Situation: The 2019 Growth Policy's principal growth strategy is to focus the cities development into Neighborhood Centers. The formation and promotion of these dense, multi-use areas is intended to create unique urban spaces that are supported by one or more of Helena's residential neighborhoods.

Proposal/Objective: Planning Division staff have conducted analysis of several Helena neighborhoods, conducted public outreach and have utilized in house analytics tools to identify the Railroad District as being the ideal choice for our first neighborhood planning effort based on the current Growth Policy.

Notice of Public Hearing: N/A

<u>ATTACHMENTS:</u>
<input type="checkbox"/> Value Per Acre Map
<input type="checkbox"/> RR District Recommendation Memo
<input type="checkbox"/> Future Land Use Map
<input type="checkbox"/> 4-28-21 Admin Memo



0 0.25 0.5 1 1.5 2 Miles

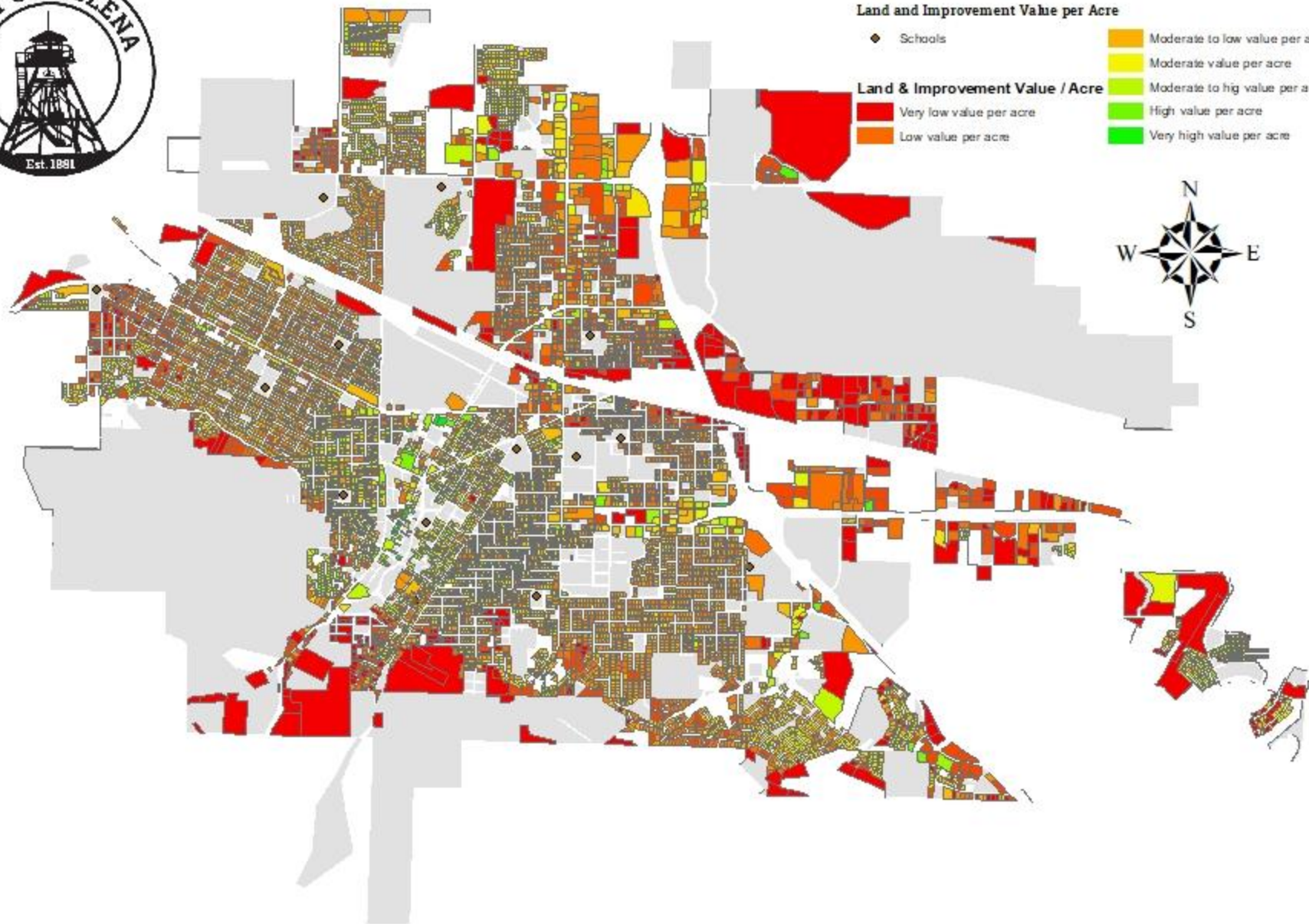
Land and Improvement Value per Acre

◆ Schools

Land & Improvement Value / Acre

Very low value per acre
Low value per acre

Moderate to low value per acre
Moderate value per acre
Moderate to high value per acre
High value per acre
Very high value per acre





PLANNING STAFF

Community Development Department

316 North Park Avenue, Room 445

Helena, MT 59623

Phone: 406-447-8459
Fax: 406-447-8460
Email: malvarez@helenamt.gov

helenamt.gov

Date: May 20, 2021

To: Director Sharon Haugen

From: Michael Alvarez and Michael McConnell

Subject: Neighborhood plan and neighborhood center location

The population of the City of Helena and the Helena Valley continues to grow and urbanize. That growth is impacting precious land that for decades had been open space or devoted to agriculture. The persistent shift of that land towards providing housing and services impacts the region's natural resources and restricts its residents' access to the enjoyment of nature. Further, expansion of the urban boundary through low-density development requires costly new infrastructure development, reduces the return on city investment in existing infrastructure, compounds congestion, and disassociates property taxes from the locations realizing many of the impacts of population increases. Both the 2011 & 2019 City of Helena Growth Policies recognized the need for the region's population increases to predominately occur within the city limits to mitigate these effects.

Neighborhood Planning and in particular Neighborhood Center development is a key component of the 2019 City of Helena Growth Policy. This development model will allow the city to grow in a manner that locates more goods and services closer to existing neighborhoods, provides more value per dollar spent on infrastructure and provides more opportunities for residents to be involved in the planning process. Importantly, it increases the opportunities for creating varied, affordable, accessible, and more plentiful housing for both new and longstanding residents.

The 2019 Growth Policy recommends the creation of a process and criteria for the selection of Neighborhood Plans and Neighborhood Center areas. The following is a recommendation and analysis of the criteria used to select a neighborhood to receive a plan and center location.

Community Development Staff recommends the Midtown area for a Neighborhood Plan encompassing a Neighborhood Center. A plan in this area will address the challenges and facilitate the opportunities highlighted in the 2015 Railroad Urban Renewal District Plan (RR URD Plan) to be more specifically targeted and matched with the goals of the 2019 Growth Policy. This area was determined through an evaluation of five criteria, Accessibility, Institutions & mix of uses, placemaking opportunity, development and redevelopment opportunity, and planned infrastructure expansion.

Neighborhood Selection Criteria:

- **Accessibility**

- "The location should have the capacity to be accessed by a variety and volume of transportation."
- Pro:
 - Midtown is anchored in the Southwest corner by the intersection of two major arterials, Highway 12 and North Montana Ave.
 - Possible expansion of Centennial Trail.
 - Extensive existing bike/pedestrian network.
 - "The absence of sidewalks and bicycle facilities endangers pedestrians and cyclists, and more generally undermines the sustainability and quality of life in the district. Walkability ranks high on the list of priorities for neighborhood residents." - RR URD Plan pg. 15.
- Con:
 - City does not control major arterials.
 - Neighborhood bisected by railroad.
 - Intersections pose significant difficulties to mobility.
 - "defective and inadequate street layout plagues various parts of the district, and creates circulation problems, access limitations, and critically unsafe conditions which threaten motorists, cyclists, and pedestrians alike." - RR URD Plan pg. 13.

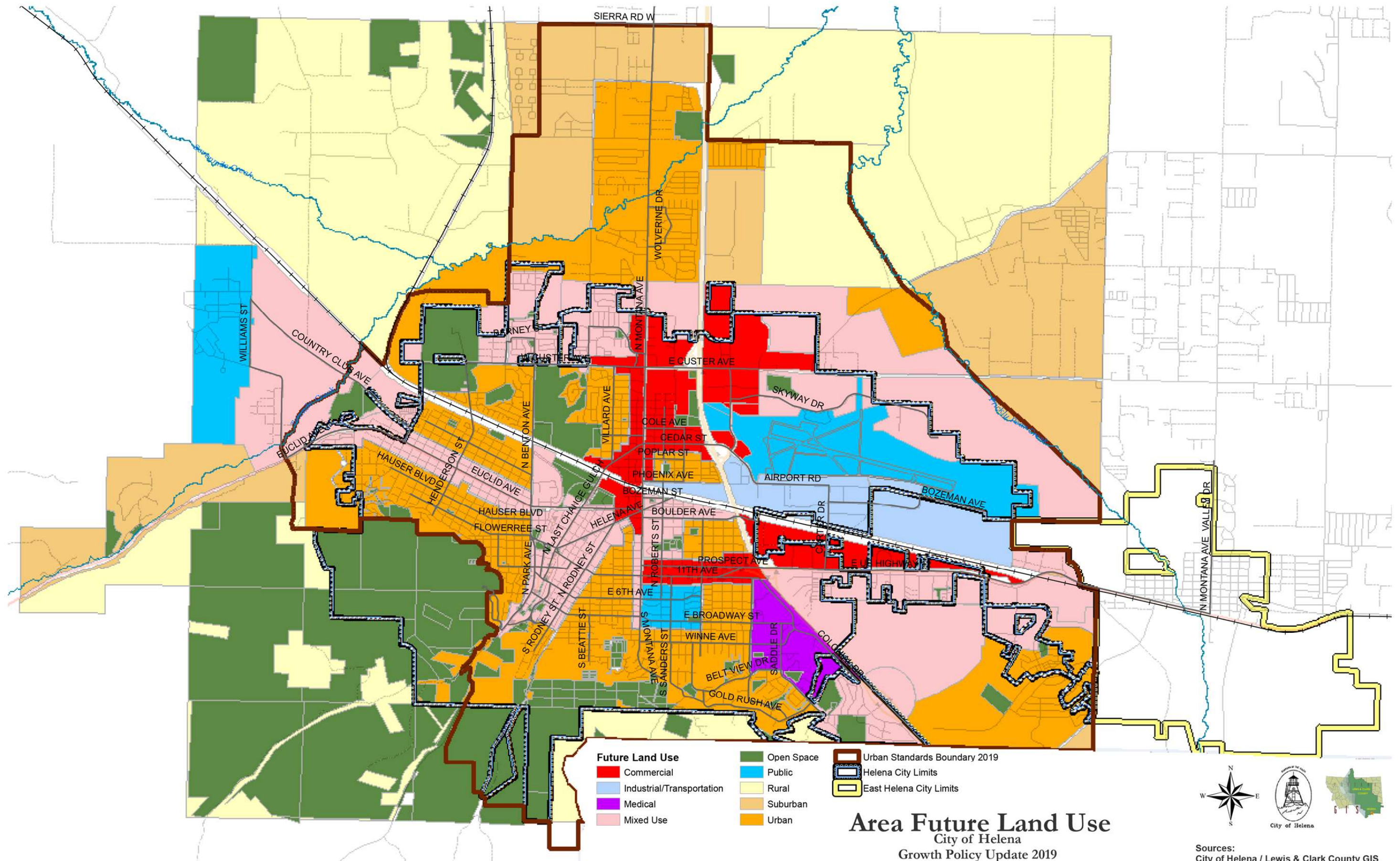
- **Institutions & mix of Uses**
 - “Neighborhood Centers should be placed at those intersections unique to cities where a mix of uses can be found.”
 - Pro:
 - Educational hub (Helena College, Helena High, and Bryant Elementary)
 - Long-standing and diverse commercial businesses.
 - Montana Rail Link.
 - Recent influx of new businesses.
 - Con:
 - Historic mix of uses poses present day challenges from contaminated areas.
- **Placemaking opportunity**
 - “Neighborhood Centers should be encouraged in places that would benefit from an enhancement of their urban form.”
 - Strong neighborhood recognition.
 - Area of historical significance.
 - “The Railroad District includes many historic sites, and the district core is an Historic District, listed in the National Register of Historic Places, called the Railroad Depot Historic District.” – RR URD Plan pg. 11.
- **Development and redevelopment opportunity**
 - “Neighborhood Centers should be encouraged in places that would benefit from city programming.”
 - Pro:
 - Caird property and vacant or underutilized parcels offer investment opportunities.
 - Urban Renewal District already in place.
 - Potential for economic uplift.
 - “Tax valuation trends indicate that deterioration in the district is even more widespread than visual assessment suggests.” – RR URD Plan pg. 11.
 - Cons:
 - Potential for displacement.
 - Some institutional actors are not bound by city development standards.
- **Planned infrastructure expansion**
 - “Neighborhood Centers should be encouraged in places that already have or are planned to soon have the infrastructure capacity to handle an intensification of use in the area.”
 - Possible expansion of Centennial Trail.
 - Five-point intersection study.
 - Sidewalk improvement project.

The neighborhood plan will continue to carry forward the goals of the RR URD Plan as listed below:

The City Commission will implement programs and evaluate projects based on the goals of this urban renewal plan. Measurable objectives, such as the following, shall be established to evaluate potential programs and projects:

- *Job Creation*
- *Increased Taxable Valuation*
- *Cost-Benefit Analysis of the Investment/Expenditure*
- *Leverage-Ratios of tax increment funds to other sources*
- *Health and Safety Concerns*
- *Historic Preservation*
- *Density and Infill*
- *Adaptive Re-Use*
- *Cost of Public Services*
- *Conformance with the goals and objectives of the Railroad URD Plan*
- *Conformance with the Helena Growth Policy and other Relevant Adopted Plans*
- *Conformance with Requirements for TIF fund expenditures per 7-15-4288, MCA*

Additionally, the neighborhood plan and the creation of a neighborhood center in the Midtown District work towards Goal G.10 of the 2019 Growth Policy and Action items A.34 and A.35.





Michael Alvarez, Planner II
Community Development Department
316 North Park Avenue, Room 403
Helena, MT 59623

Phone: 406-447-8459
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Email: malvarez@helenamt.gov

helenamt.gov

Date: May 26, 2022

To: City of Helena Administration

Subject: Neighborhood Planning Process

The Community Development Department is working on Neighborhood Plans as a part of Goal 10 in the Growth Policy.

[G.10] Plan for and establish types and quantities of land uses in Helena supporting community needs, Neighborhood Centers, aesthetics and the City's long-term sustainability.

There are two Action items being undertaken:

(A.34) Develop and adopt Neighborhood Plans that address appropriate economic and implementation strategies for Neighborhood Centers.

(A.35) Create a Neighborhood Center process to:

- *Identify Neighborhood Center locations;*
- *Develop strategy for development of center;*
- *Develop implementation methods to achieve those goals;*
- *Amend map reflecting Neighborhood Center locations.*

The CDD is always striving to find a cooperative approach in working with those that will be impacted by its actions. To that end the CDD has taken a 3-pronged approach to making the selection of a Neighborhood Center and area to receive a Neighborhood Plan.

- Survey on BeHeard
 - 60+ responses as of 04/21.
 - The survey asked residents to talk about the immediate environment outside of their door.
 - Survey data both points out specific problem areas, as well as paints trends in neighborhoods.
 - Survey data provides a narrative to the GIS analysis.
 - The data has not been analyzed yet but there is a strong ask for better pedestrian infrastructure that is already apparent (the first 48 respondents used the word "sidewalk(s)" 53 times).
- GIS Mapping
 - Working with GIS to find trends across the city is a key part of the process.
 - CDD has primarily used GIS for more display purposes in the past and are strongly encouraged by its usefulness as an analysis tool in this project.
- Partnerships

- CDD has presented to and collaborated with the Planning Board about this project twice.
- CDD has presented to and talked with the HCC about this project.
- Our great survey response owes particular thanks to the HCC.

The collected data is being analyzed with respect to the five below Neighborhood Center decision criteria:

- Accessibility – the location should have the capacity to be accessed by a variety and volume of transportation.
- Institutions & Mix of uses – Neighborhood Centers should be placed at those intersections unique to cities where a mix of uses can be found.
- Placemaking opportunity – Neighborhood Centers should be encouraged in places that would benefit from an enhancement of their urban form.
- Development and redevelopment opportunity - Neighborhood Centers should be encouraged in places that would benefit from city attention.
- Planned infrastructure expansion – Neighborhood Centers should be encouraged in places that already have or are planned to soon have the infrastructure capacity to handle an intensification of use in the area.

The survey closes on Friday, 04/23/21. The CDD staff will then take two weeks to analyze the data and develop recommendations.

Michael Alvarez, Planner II

Community Development Department
 City-County Building
 316 N. Park Ave, Rm 403
 Helena, MT 59623

City of Helena, Montana

May 27, 2022

To: Tim Burton - Intermin City Manager

From: Ryan Leland, Public Works Director
Ed Coleman, Public Works Deputy Director

Subject: Information Only Overview on the Operations of the Integrated Solid Waste Management System between the City of Helena and Lewis and Clark County, and how the System is Currently Funded

Present Situation: Staff Presentation on the Overview of the Integrated Solid Waster System with City of Helena and Lewis and Clark County

Proposal/Objective: Informational Only

Notice of Public Hearing: Attached

ATTACHMENTS:
<input type="checkbox"/> Memo
<input type="checkbox"/> System Overview Presentation
<input type="checkbox"/> Funding Overview



Administrative Meeting

helenamt.gov



Subject: Information Only Overview on the Operations of the Integrated Solid Waste Management System between the City of Helena and Lewis and Clark County, and how the System is Currently Funded

Date: June 1, 2022

From: Ryan Leland, Public Works Director
Ed Coleman, Public Works Deputy Director

Policy Issue

None at this time- Informational update to the Commission

Recommendation and Alternatives

N/A – this item is information only

Staff Recommendation

N/A – this item is information only

Alternatives for Consideration

N/A

Legal Review

No Legal Review

Background Information

The City of Helena and Lewis and Clark County have had an integrated solid waste management system for several years. This presentation will provide the Commission some history of the City's solid waste system, how it currently operates, and how it is funded.

Respectfully submitted,

Tim Burton
Interim City Manager

Attachments: Integrated Solid Waste Management System Overview
Solid Waste Revenue and Expenditures Presentation

City Of Helena and Lewis & Clark County Integrated Solid Management System



City of Helena Solid Waste Division

The City of Helena Solid Waste Division is responsible for solid waste operation and maintenance in the following areas:

- The City of Helena and Lewis & Clark County has a long-standing partnership in Integrated Solid Waste;
- Operation of a Transfer Station that serves City of Helena and Scratch Gravel District residents by agreement;
- The collection and transport of solid waste from residential homes within the City of Helena;
- The collection and transport of solid waste and cardboard from businesses within the City of Helena;
- Conducts a recycling program that serves City of Helena and Scratch Gravel District residents;
- Administers a Landfill Monitoring District that ensures proper oversight and monitoring of the closed Helena City Landfill;
- Transports collected solid waste to the Lewis & Clark County Landfill;
- Manages Lewis & Clark County Landfill, Scratch Gravel District, Marysville District and Augusta Solid Waste District through an inter-local agreement;
- Office staff administers all Transfer Station permits that include Scratch Gravel (County Residents), City permits (City Residents), recycling permits (City Renters). Staff manages all permits from original mail out to billing overages.

The division is staffed with 23 FTEs who operate in the following program areas:

Administrative: 6 FTE's
Transfer Station: 8 FTE's
Commercial: 2 FTE's
Residential: 6 FTE's
Recycling: 1 FTE's



Transfer Station

This section's primary responsibility is to operate and maintain a solid waste transfer station for the public health and safety of the City of Helena and the Scratch Gravel District residents and businesses, including:

- Providing service to approximately 83,000 City of Helena and Lewis & Clark County residents of which 26,670 are City of Helena and Scratch Gravel permits;
- Transfer Station served 188,000 vehicles in FY21.
- Serves as the collection point for all solid waste collected within the City and Scratch Gravel District;
- Transports collected solid waste to the Lewis & Clark County Landfill;
- Provides Administrative support for waste tracking, data collection, and customer service;
- Maintains six (6) outlying recycling drop off locations for public use seven (7) days w week;
- Provides Tipping accounts for customers and processes monthly billing;
- Approximately 38,000 to 45,000 tons of waste handled annually;

At the Transfer Station we employ twenty-three full time employees to include one Superintendent, one Supervisor, one Recycling Coordinator/Scale Supervisor, one Scale Operator, and two Admin Assistant.



Commercial Solid Waste Collection

This section's primary responsibility is to operate and maintain a Commercial Solid Waste Collection Service for the public health and safety of the City of Helena's businesses, including:

- Vies with a private company for 2000 commercial customers;
- Provides service to approximately 665 commercial accounts;
- Offers pick-up 6 days a week (Monday – Saturday);
- Service provided by automated Front-load trucks, Side-load trucks and Roll-off trucks;
- Provides a Commercial Cardboard Collection Service that collects cardboard for recycling annually;
- Maintains data collection and processes monthly billing;
- Provides service for special events (Governors Cup, Alive at Five, Athletic events, etc.);
- Maintains data, generates bin repair and delivery, and work orders for commercial customers;
- Transports all recyclable commodities to processor.

Commercial Solid Waste Collection employs two full time employees, two Class-B equipment operators.



Residential Solid Waste Collection

This section's primary responsibility is to operate and maintain a Residential Solid Waste Collection Service for the public health and safety of the City of Helena's residents, including:

- Funded by approximately 11,632 City of Helena residential property assessments;
- Provides service to approximately 33,530 City of Helena residents;
- Service is required by City Ordinance;
- Exclusive provider of Residential Collection within City Limits by City Ordinance;
- Operates on a 5 day a week collection (Monday-Friday). Collection days are based on location. Includes 14 residential routes;
- Service provided by automated Side-load trucks;
- Bulk Waste Pickup service provided by rear load service for bulky items;
- Maintains data, generates bin repair and delivery, and work orders for residential customers;
- Offers City Residents subsidized rates on curbside recycling through a contract with Helena Recycling for curbside service. Billing and bins are provided by the city Completely voluntary, and collection is handled through the private recycling company.

Residential Solid Waste Collection employs six full time employees which are Class-B equipment operators.



Recycling Operation

This section's primary responsibility is to operate and maintain a Recycling Operation for the public health and safety of the City of Helena and Scratch Gravel District residents, including:

- The recycling budget is jointly funded through solid waste assessments from property owners in the Scratch Gravel District as well as residential property owners in the corporate city limits for 4-plex or less;
- Maintains Recycling Roll-offs at six (6) locations for public use; as well as providing recycling roll-offs located at the Transfer Station.
- Offers recycling for glass, aluminum, tin, newspaper, magazines, office paper, cardboard, phone books, e-waste, oil, antifreeze, automotive batteries, tires, Freon units, green waste, scrap metal, plastics #1 and #2;
- Admin tracks data and diversion rates on recyclable material;
- Recovers used oil to be used as heating fuel at multiple City and County facilities.

Recycling Operation employs two full time employees, one Recycling Coordinator and one recycling laborer/Class-B equipment operator with Freon Recovery Certification.



Lewis & Clark County Solid Waste Division

The Lewis & Clark County Solid Waste Division is responsible for solid waste operation and maintenance in the following areas:

- The Lewis & Clark County and the City of Helena has a long-standing partnership in Integrated Solid Waste;
- Through the 2015 Interlocal Agreement the City of Helena manages the Lewis & Clark County Landfill, Scratch Gravel District, Marysville District and Augusta Solid Waste District;
- Operation of the Lewis & Clark County Landfill serves the City of Helena Transfer Station, Marysville Transfer Site, City of Helena Wastewater and residential/commercial landfill account holders;
- The landfill and Marysville sites conduct a scrap metal collection recycling program;
- Administers a Landfill Monitoring Program that ensures proper oversight and monitoring of the Lewis & Clark County Landfill as well as the closed Scratch Gravel Landfill;
- Transports collected solid waste from the Marysville Transfer Site to the Lewis & Clark County Landfill.

The division is staffed with 8 employees who operate in the following program areas:

Operators:	2 FTE's 1 PTE
Operator/Mechanic:	1 FTE
Litter Pickers:	2 (seasonal)
Marysville Attendant:	1 PTE
Administrative:	1 FTE



Lewis & Clark County Landfill

The Lewis and Clark County Landfill is managed by the City of Helena through an Interlocal Agreement established in 2015. The permitted landfill site is approximately 160 licensed acres with an additional 160 acres, to the south, for future landfill expansion. The landfill serves multiple customers to include:

- Class II Municipal Solid Waste
- Class IV Construction/Demolition
- Green Waste
 - Lewis & Clark County, in a cooperative effort with the city processes green waste at the Lewis & Clark County Landfill producing high quality compost.
- Liquid Waste
- Scrap Metal Recycling





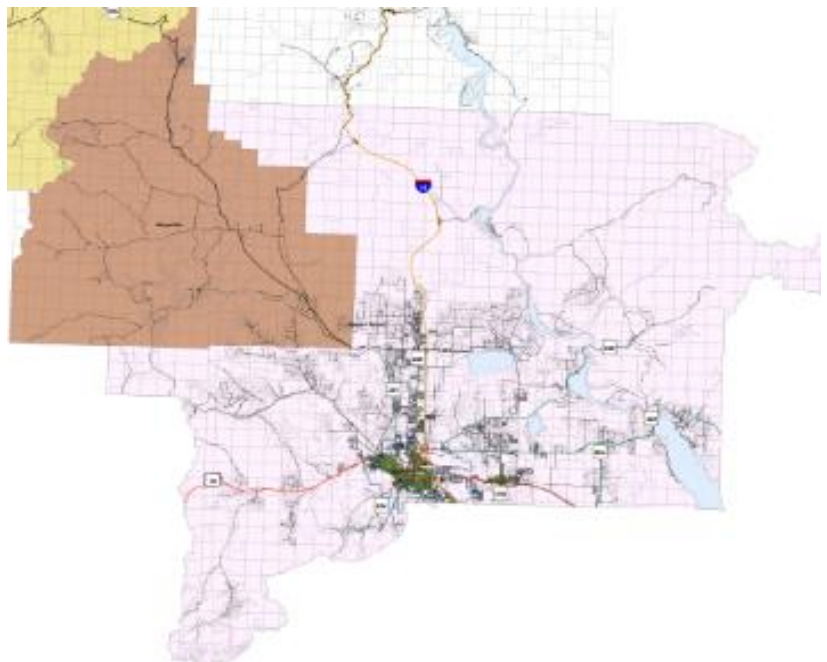
Lewis & Clark County Scratch Gravel and Marysville Districts

The Lewis & Clark County Scratch Gravel District includes the Marysville Subdistrict.

- Scratch Gravel District is funded by approximately 15,038 Scratch Gravel property assessments. Scratch Gravel residents have the option to direct haul their waste to the City of Helena Transfer Station using their Scratch Gravel Solid Waste Permit, up to 3,000 pounds every fiscal year. In addition, residents have the option for residential weekly pickup service through a fee based private hauler. Lewis & Clark County pays tipping for all scratch gravel district waste collected by the private hauler tipped at the City of Helena Transfer Station.
- Marysville Subdistrict is funded by approximately 532 Marysville District property assessments. Marysville district residents pay into both the Scratch Gravel assessment fund as well as the Marysville assessment fund. Marysville residents have the option to direct haul their waste to the Marysville Transfer Site as well as the City of Helena Transfer Station using their Scratch Gravel Solid Waste Permit, up to 3,000 pounds every fiscal year. In addition, residents have the option for residential weekly pickup service through a fee based private hauler. Lewis & Clark County pays tipping for all scratch gravel district waste collected by the private hauler tipped at the City of Helena Transfer Station.

Lewis & Clark County Scratch Gravel District

Scratch Gravel: 
Marysville: 



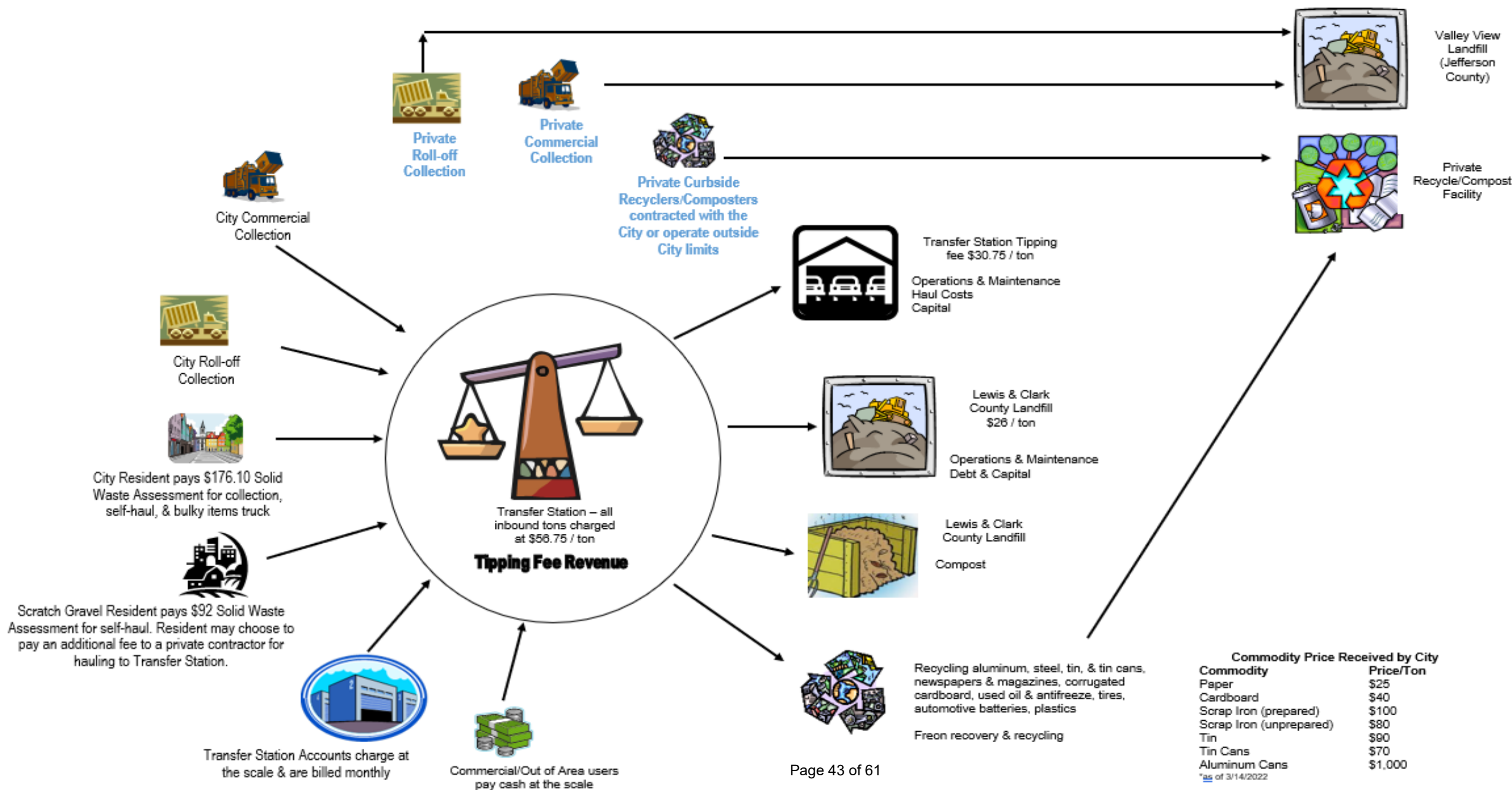
Solid Waste Revenue & Expenditures Overview

Leea Anderson

Environmental Regulation Pretreatment Manager
City of Helena
April 2022



Where it comes from Where it goes



City Funds

541- Residential

542- Commercial

546- Transfer Station

547- Recycling



541- Residential

Revenue

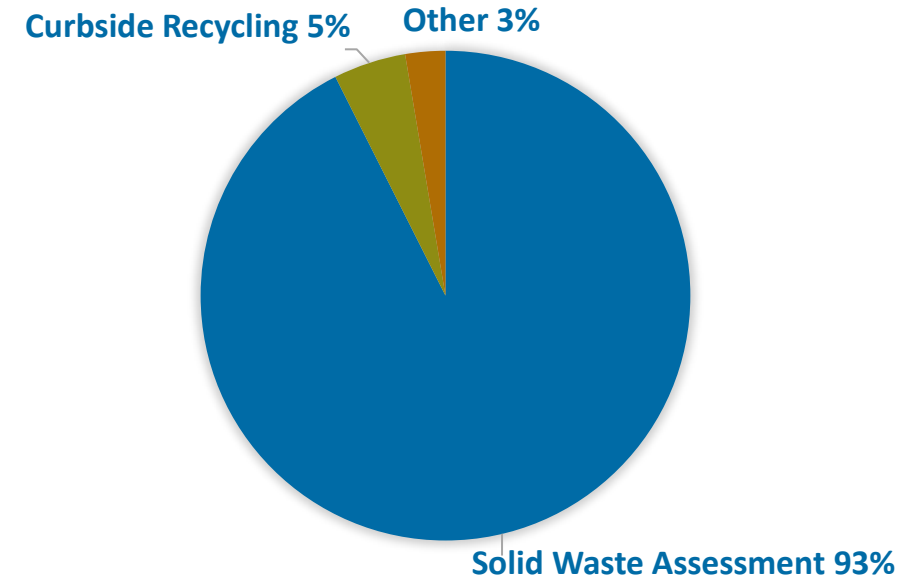
- Solid Waste Assessment is approved annually by the City Commission
- Currently Solid Waste Assessment is \$176.10, set by Resolution 20688
- Solid Waste Assessment is \$2,055,653 (~93%)
- Curbside Recycling is \$106,176 (~5%)
- Other (Tipping Overages, Pro-Rated Tipping, Interfund Transfers, Delinquent Assessment, and Others) is \$58,633 (~3%)

Expenditures

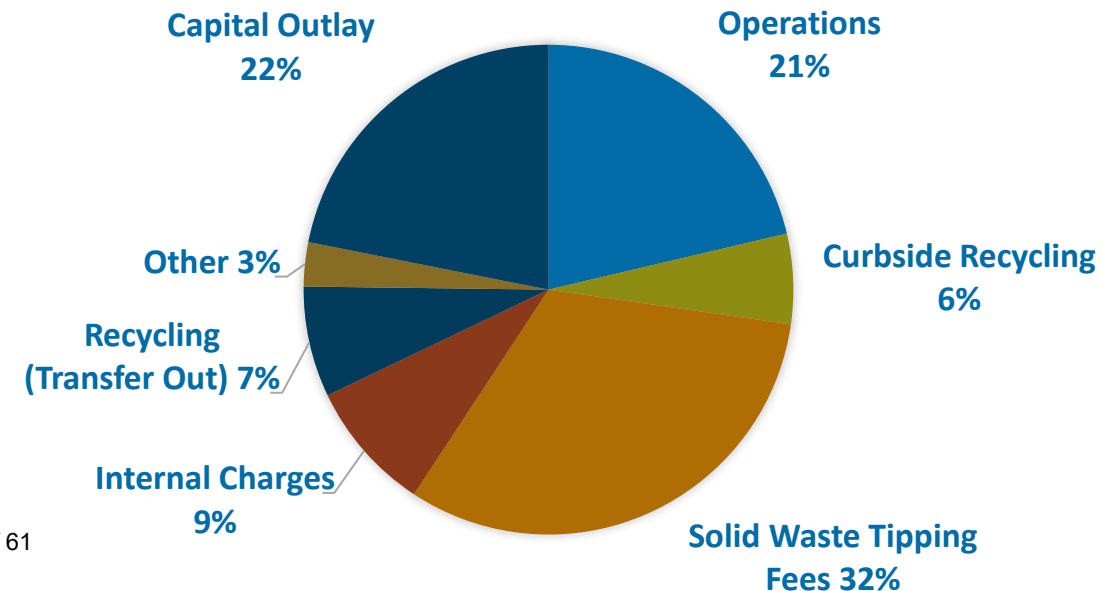
- Solid Waste Tipping Fees are \$985,365 (~32%)
- Operations are \$656,744 (~21%)
- Internal Charges are \$266,028 (~9%)
- Curbside Recycling is \$183,132 (~6%)
- Recycling (Transfer Out) is \$225,000 (~7%)
- Capital Outlay is \$674,027 (~22%)



REVENUE



EXPENDITURES

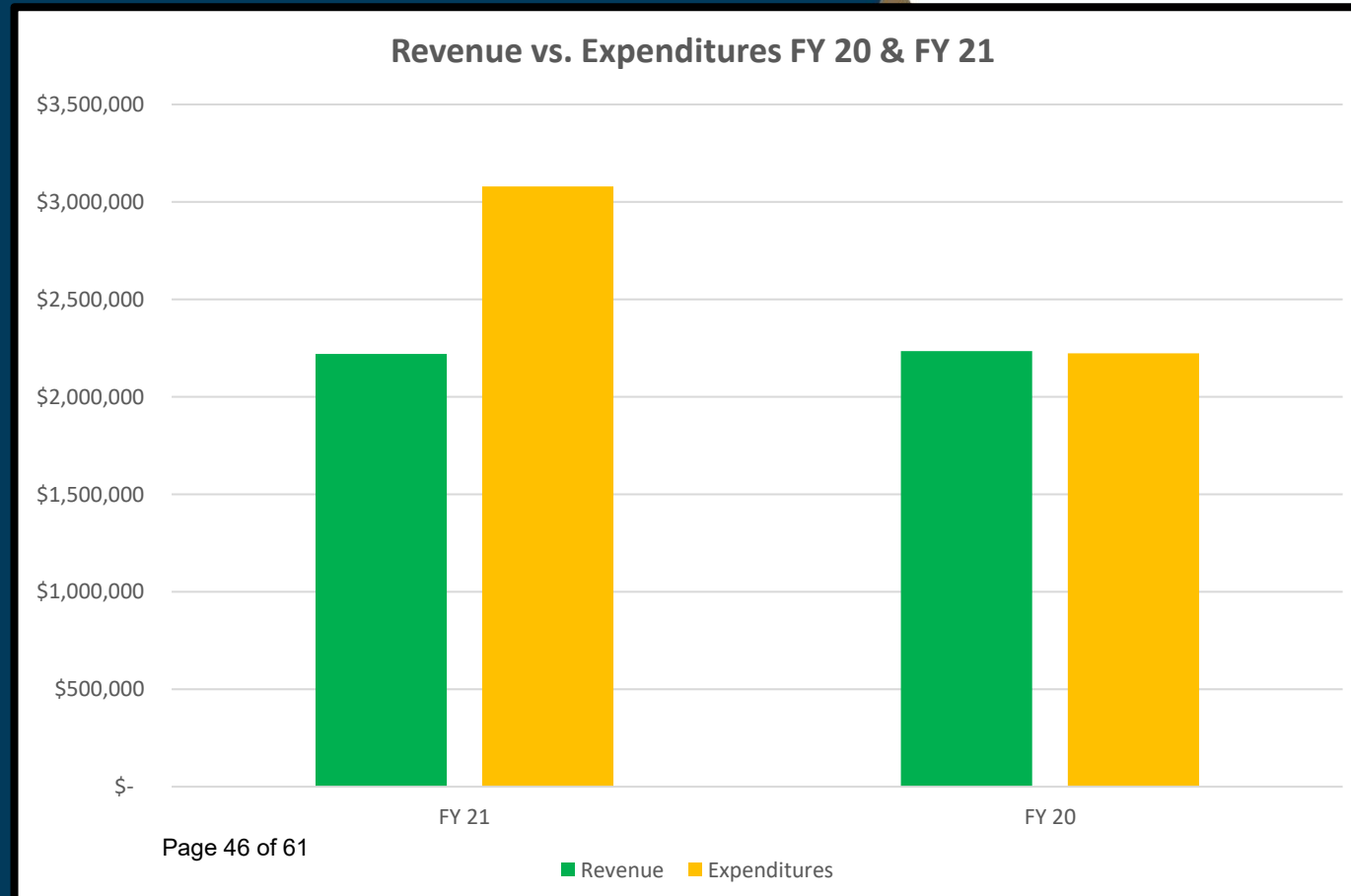


541- Residential

Revenue Compared to Expenditures

FY 21- Revenue \approx \$2,220,462
Expenditures \approx \$3,080,143
Total Deficit of approx. \$859,681

FY 20- Revenue = \$2,234,973
Expenditures = \$2,223,637
Capital Reserves of \$11,336



542- Commercial

Revenue

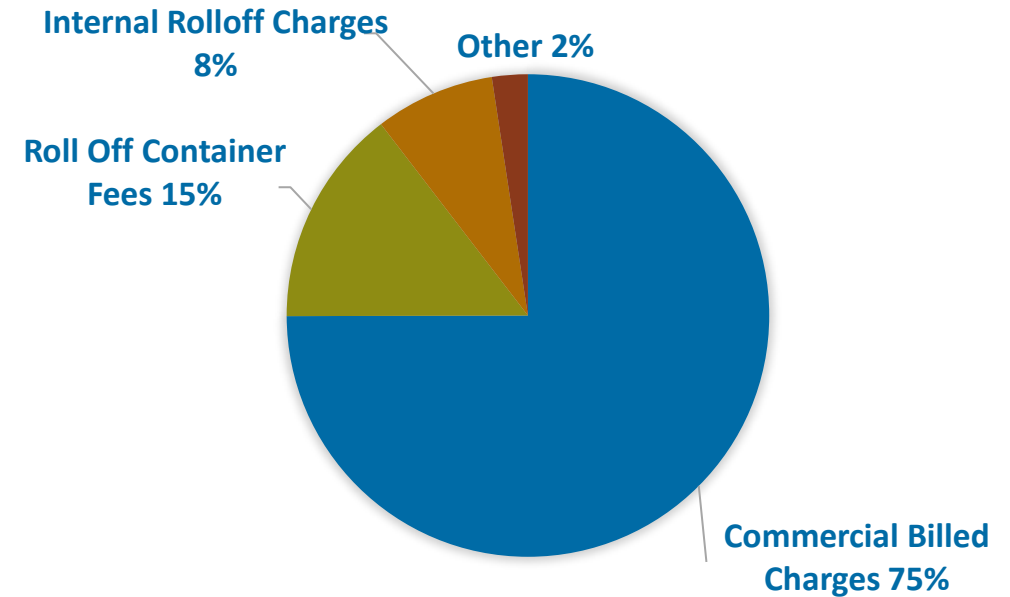
- Commercial customers pay fees based on the City's Commercial Rate Matrix.
- Commercial Rate Matrix is based on the size of the container and frequency of pickup
- Commercial Billed charges are \$899,845 (~75%)
- Roll Off Container fees are \$175,443 (~15%)
- Internal Roll Off Charges are \$96,370 (~8%)
- Other (Interfund Transfers, Interest Earnings) are \$28,801 (~2%)

Expenditures

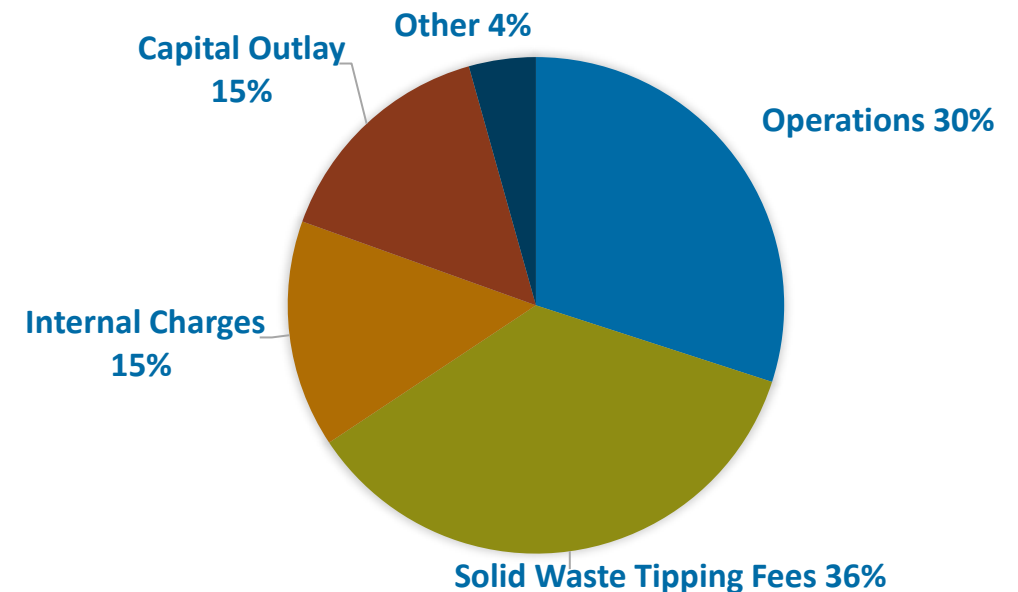
- Solid Waste Tipping Fees are \$467,715 (~36%)
- Operations are \$393,266 (~30%)
- Internal Charges are \$194,202 (~15%)
- Capital Outlay is \$198,741 (~15%)
- Other (Supplies and Materials, Purchased Services, and Fixed Charges) are \$57,132 (~ 4%)



REVENUE



EXPENDITURES

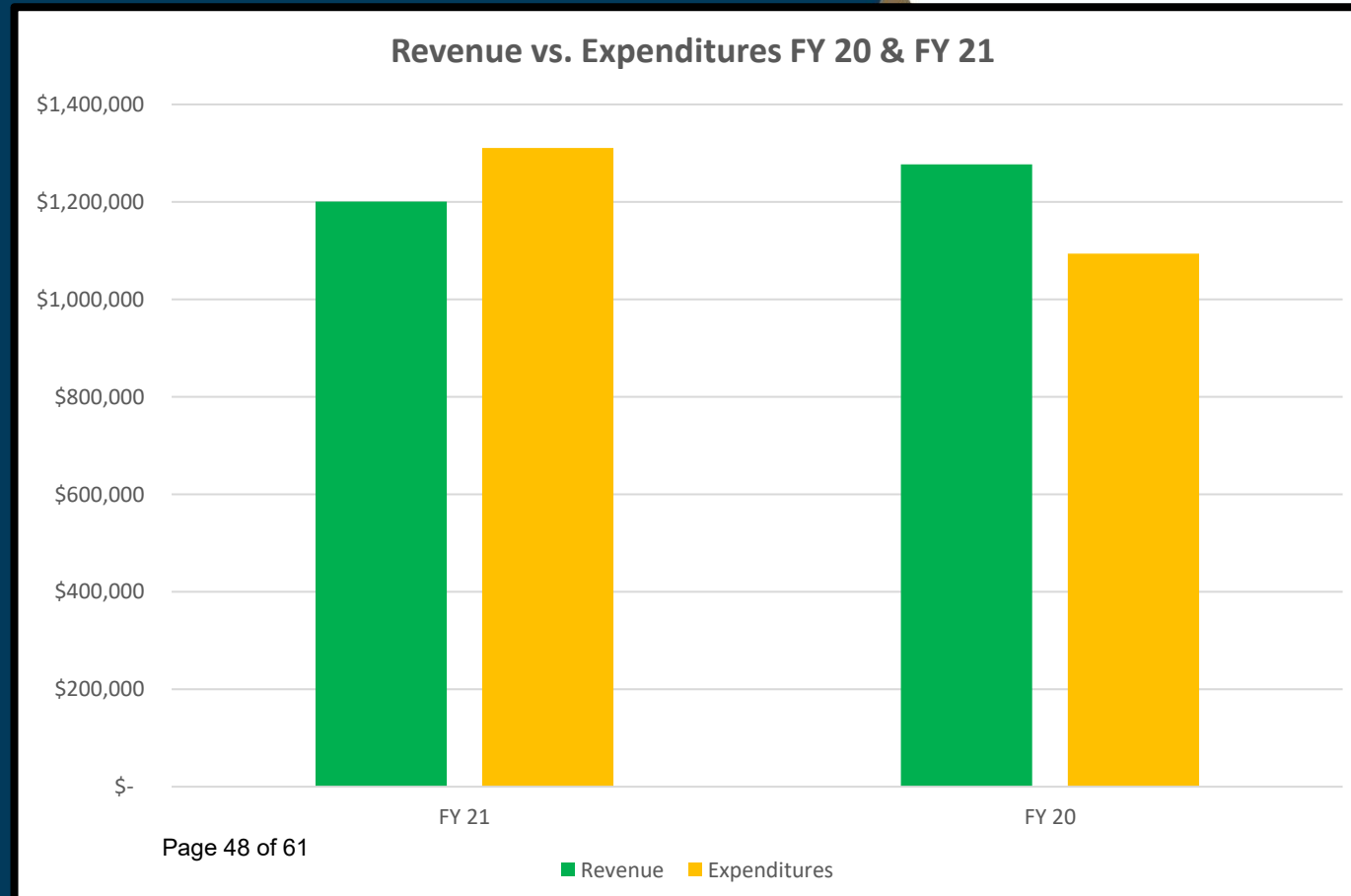


542- Commercial

Revenue Compared to Expenditures

FY 21- Revenue \approx \$1,200,459
Expenditures \approx \$1,311,016
Total Deficit of approx. \$110,557

FY 20- Revenue = \$1,276,854
Expenditures = \$1,094,003
Capital Reserves of \$182,848



546- Transfer Station

Revenue

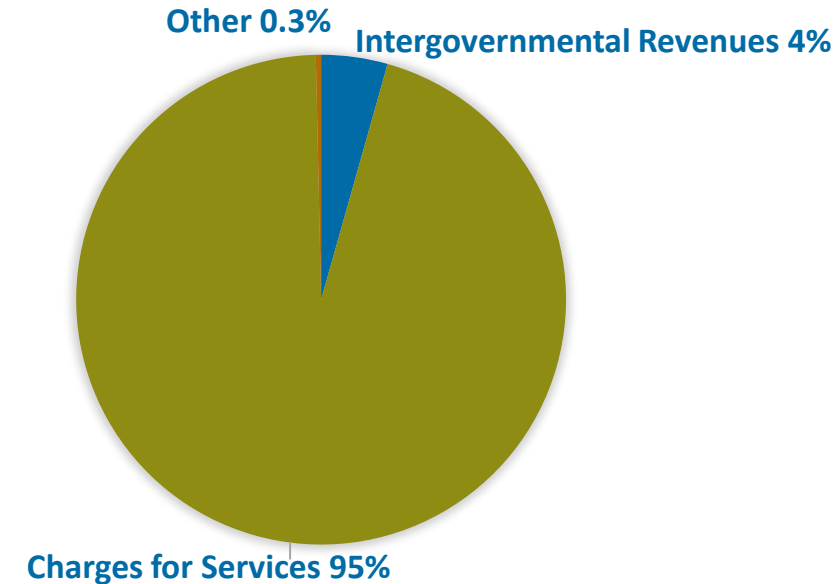
- Charges for Services are \$2,719,333 (~95%)
- County contributions are \$125,000 (~5%)
- Other (Interest Earnings, 645- Insurance and Safety Contributions) are \$9,845 (~less than 1%)

Expenditures

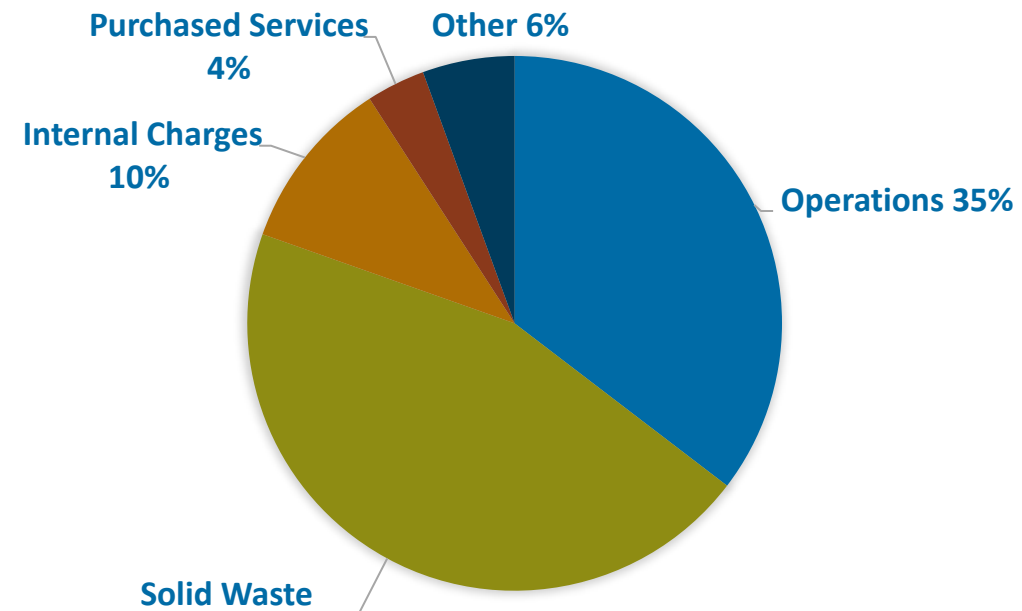
- Solid Waste Tipping fees paid to the County are \$1,065,416 (~45%)
- Operations are \$837,309 (~35%)
- Internal Charges are \$247,601 (~10%)
- Purchased Services are \$84,201 (~4%)
- Other (Supplies and Materials, Fixed Charges, Transfers Out, and Capital Outlay) are \$131,762 (~6%)



REVENUE



EXPENDITURES

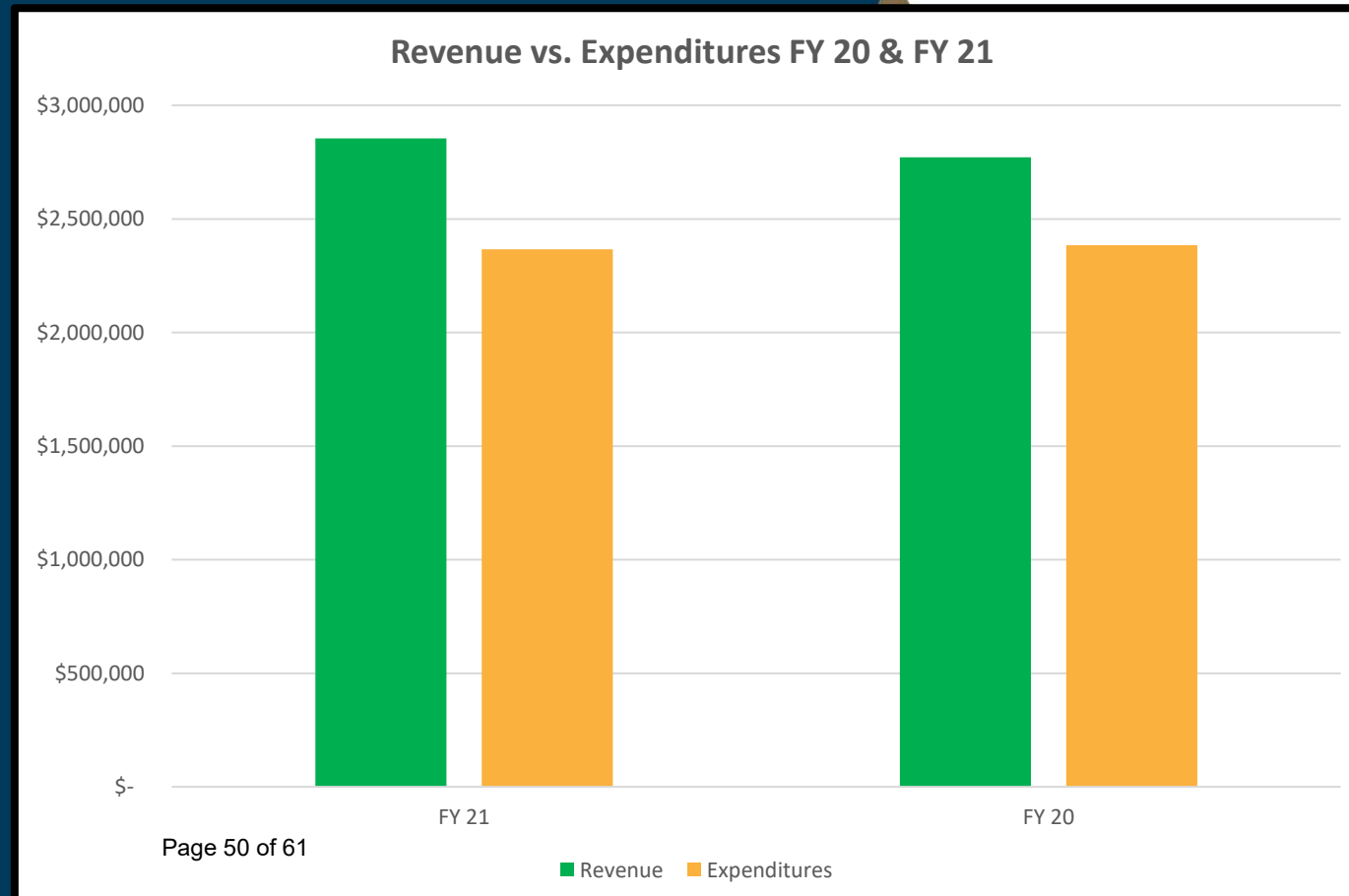


546- Transfer Station

Revenue Compared to Expenditures

FY 21- Revenue = \$2,854,178
Expenditures = \$2,366,290
Capital Reserves of approx. \$487,888

FY 20- Revenue = \$2,771,498
Expenditures = \$2,383,989
Capital Reserves of \$387,509



547- Recycling

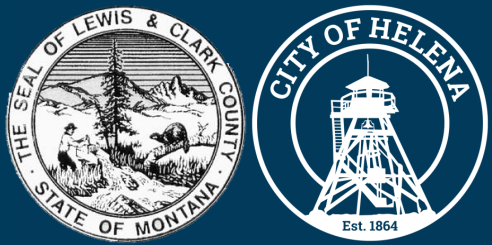
Revenue

- Contributions from the County and the Solid Waste Residential fund of \$225,000 each, total of \$450,000 total (~84%)
- The sale of recycle commodities brings in a revenue of approx. \$80,346 (~15%)

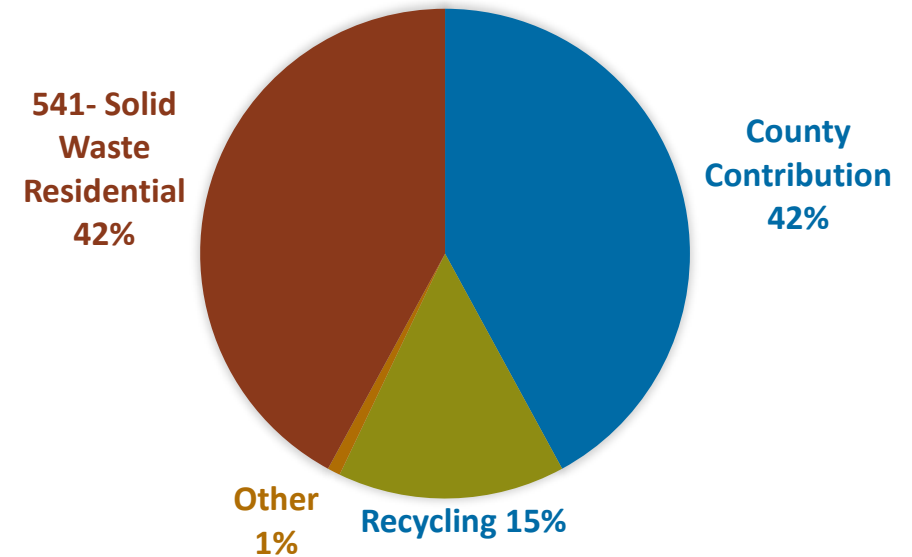
Expenditures

- Operations is \$210,228 (~36%)
- Recycling of all commodities is an expenditure of \$117,736 (~20%)
- Composting contract is \$81,154 (~14%)

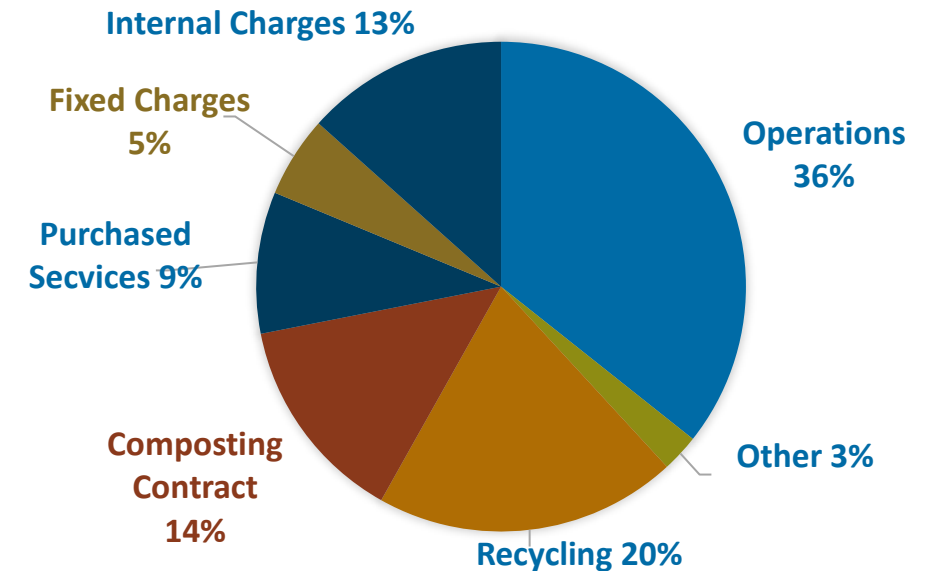
Net commodity recycling is approx. **(\$37,390)**



REVENUE



EXPENDITURES

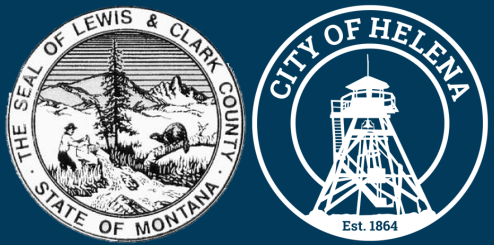


547- Recycling

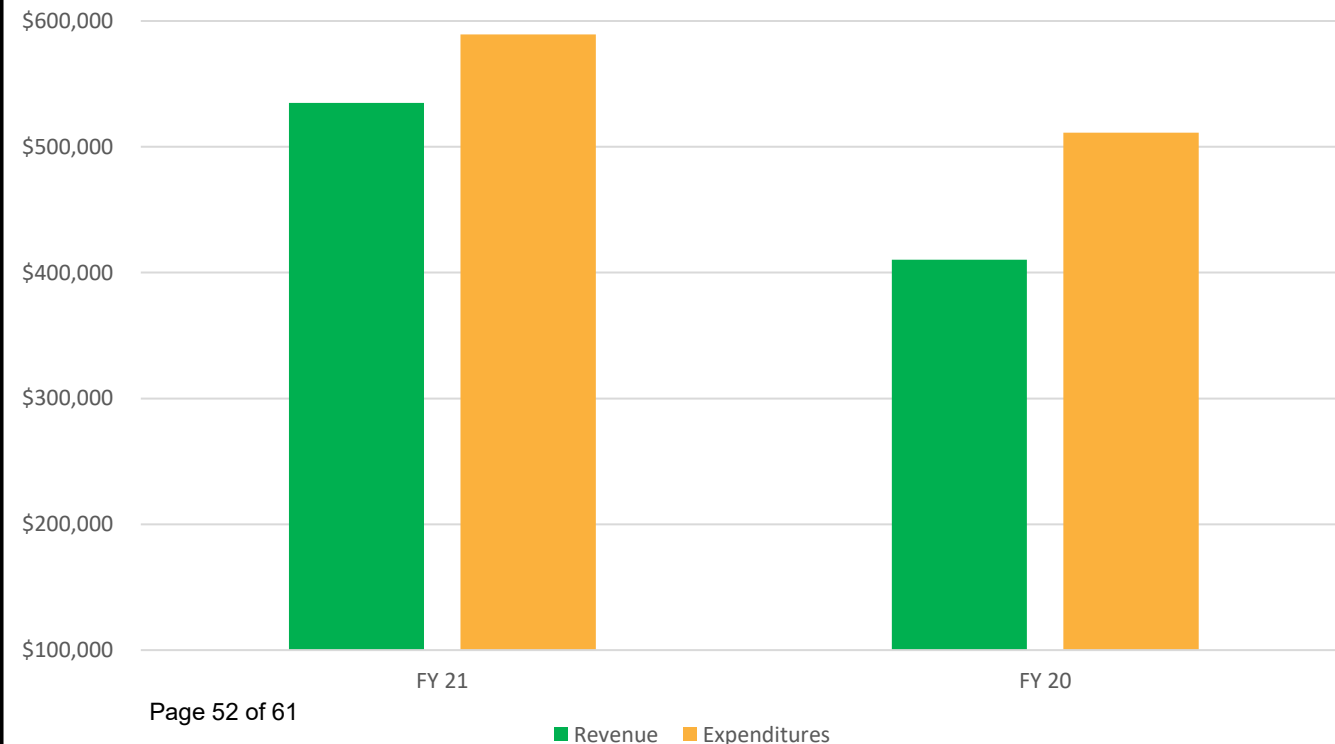
Revenue Compared to Expenditures

FY 21- Revenue \approx \$534,855
Expenditures \approx \$589,181
Total Deficit of approx. \$54,296

FY 20- Revenue = \$410,179
Expenditures = \$511,185
Total Deficit of \$101,006



Revenue vs. Expenditures FY 20 & FY 21



City Overall

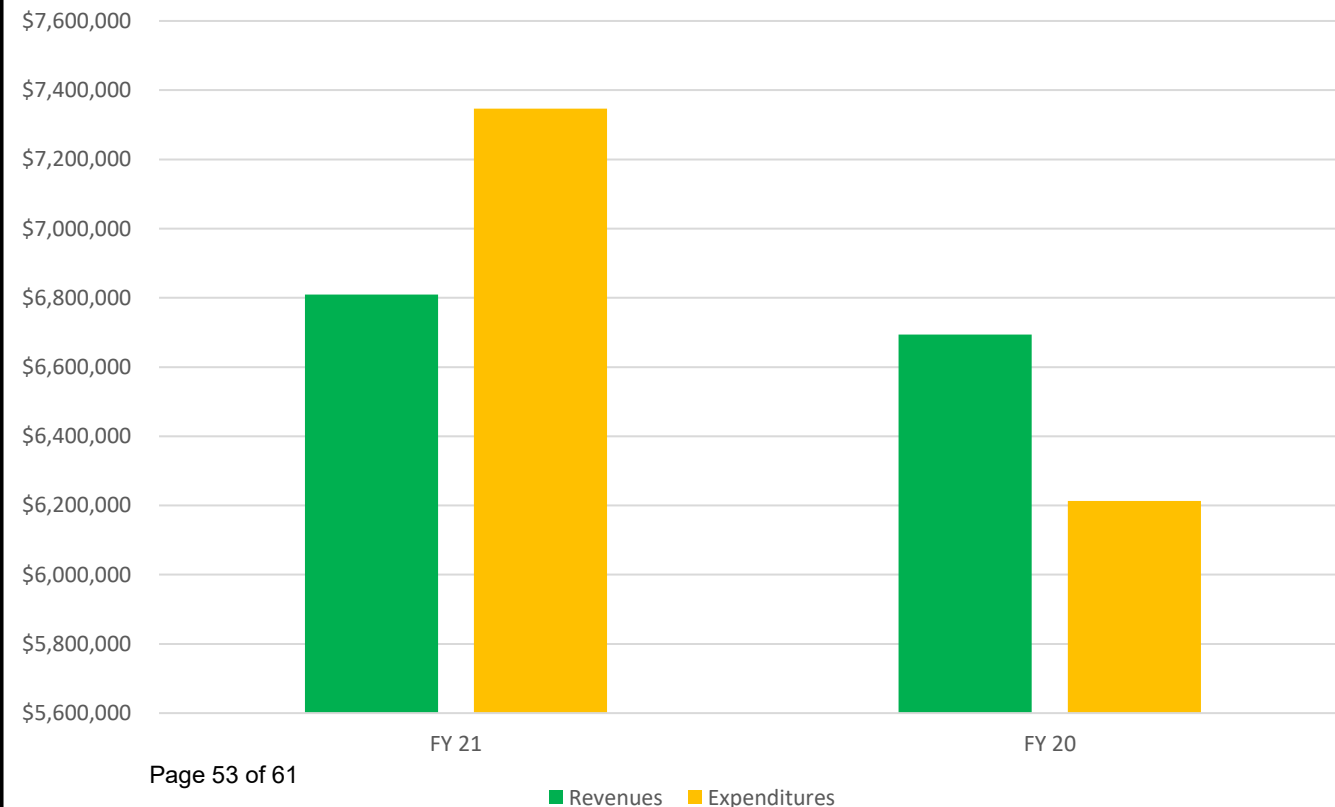
Revenue Compared to Expenditures

FY 21- Revenue ≈ \$6,809,954
Expenditures ≈ \$7,346,630
Total Deficit of approx. \$536,676

FY 20- Revenue = \$6,693,504
Expenditures = \$6,212,814
Total Capital Reserves of \$480,690



Total Revenue vs. Expenditures FY 20 & FY 21



County: Landfill

Revenue

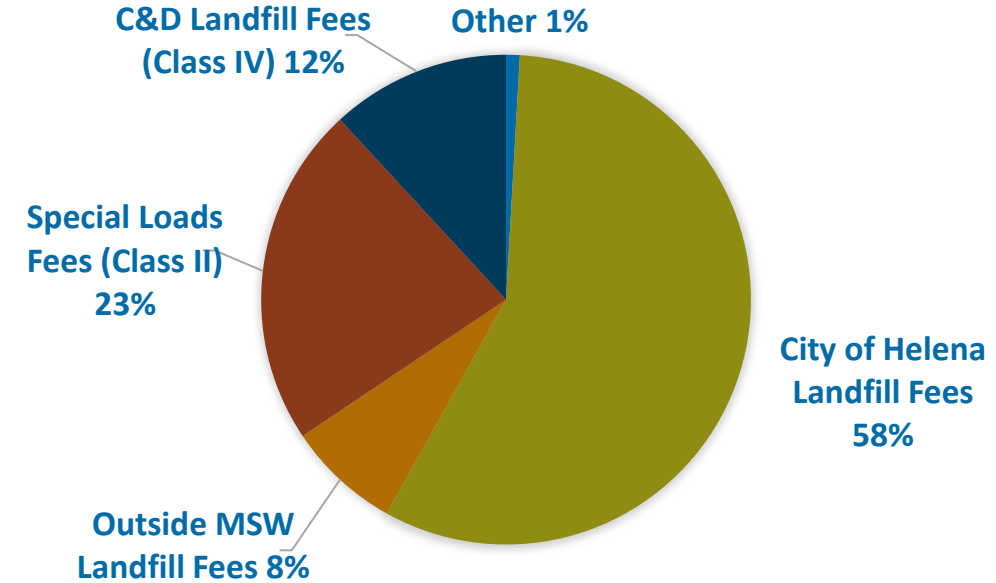
- City of Helena Landfill Fees of \$1,072,611 (~58%)
- Special Loads Fees (Class II) of \$422,568 (~23%)
- C & D Landfill Fees (Class IV) of \$222,349 (~12%)
- Outside MSW Landfill Fees of \$140,849 (~8%)
- Other (Interest Fees, Marysville Landfill Fees, Other) \$16,856 (~1%)

Expenditures

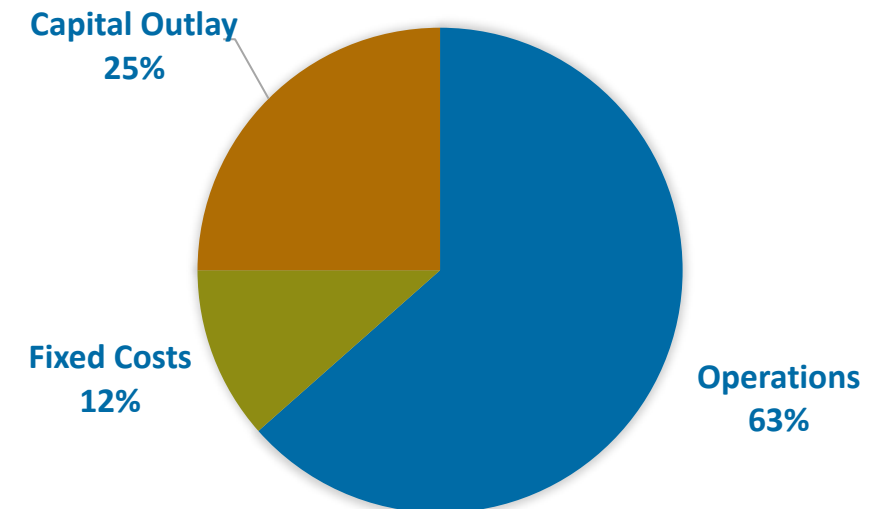
- Operations is \$552,183 (~63%)
- Capital Outlay of \$217,482 (~25%)
- Fixed Costs of \$100,249 (~12%)



REVENUE



EXPENDITURES



County: Landfill

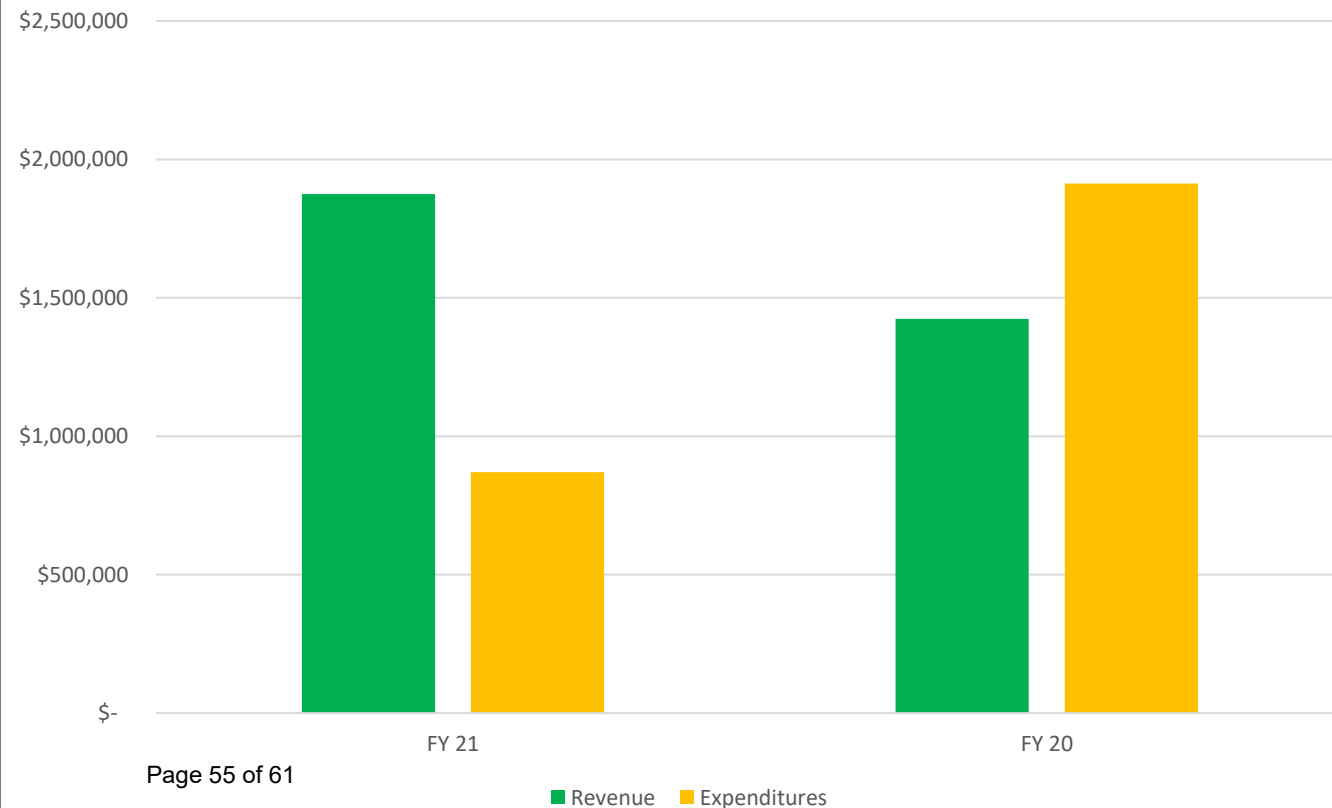
Revenue Compared to Expenditures

FY 21- Revenue = \$1,875,233
Expenditures = \$869,914
Capital Reserves of \$1,005,319

FY 20- Revenue = \$1,423,955
Expenditures = \$1,912,706
Total Deficit of \$488,751



Revenue vs. Expenditures FY 20 & FY 21



County: Scratch Gravel

Revenue

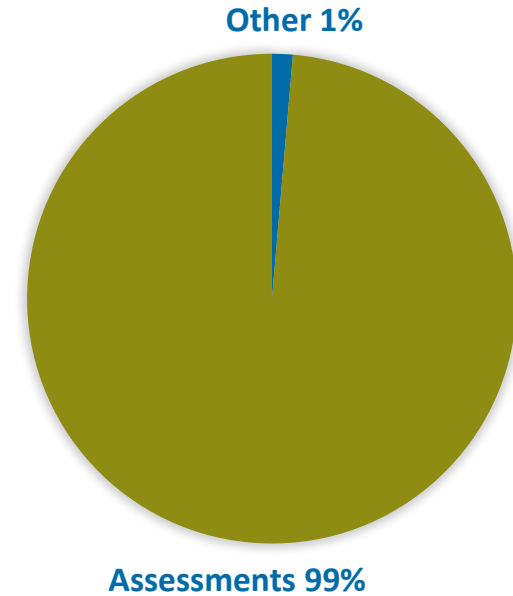
- Assessments of \$1,298,622 (~99%)
- Other (Solid Waste Permits, Pay as you Throw Program, Penalty & Interest, Interest Earnings) of \$18,004 (~1%)

Expenditures

- City of Helena Tipping Fees (~91%)
- Operations is \$110,828 (~8%)
- Fixed Charges of \$8,827 (~1%)

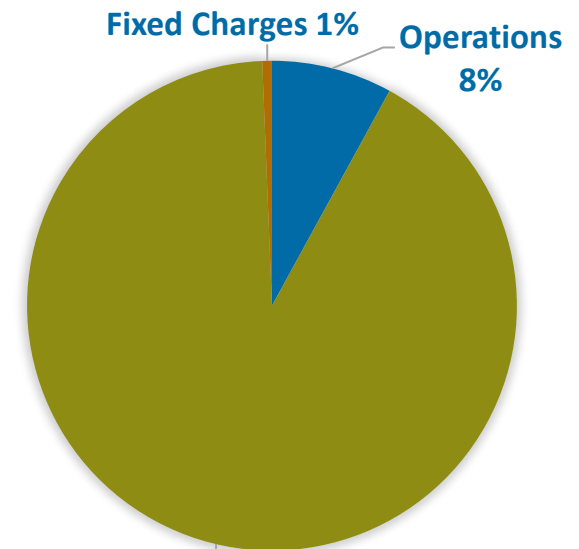


REVENUE



Assessments 99%

EXPENDITURES



City of Helena Tipping Fees 91%

County: Scratch Gravel

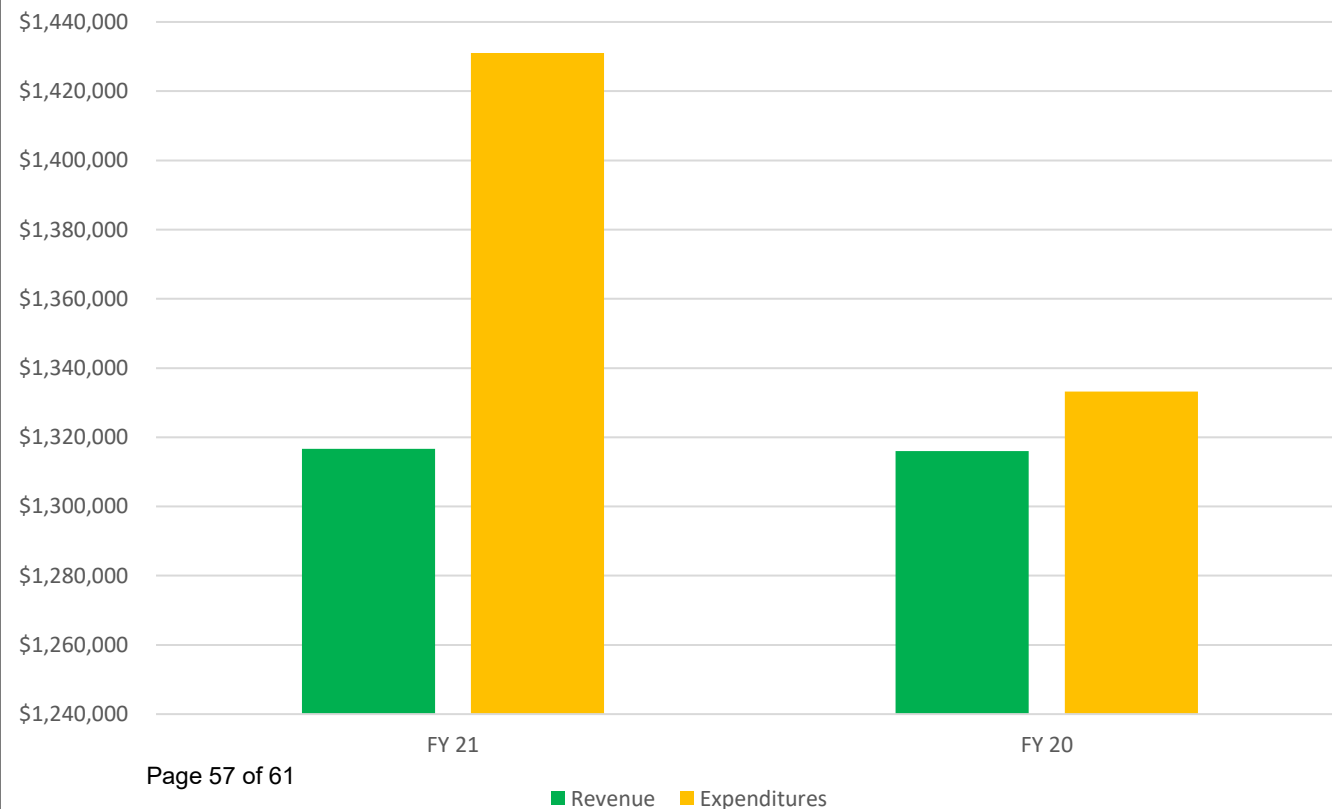
Revenue Compared to Expenditures

FY 21- Revenue = \$1,316,626
Expenditures = \$1,431,021
Total Deficit of \$114,395

FY 20- Revenue = \$1,316,034
Expenditures = \$1,333,241
Total Deficit of \$17,207



Revenue vs. Expenditures FY 20 & FY 21



County: Marysville

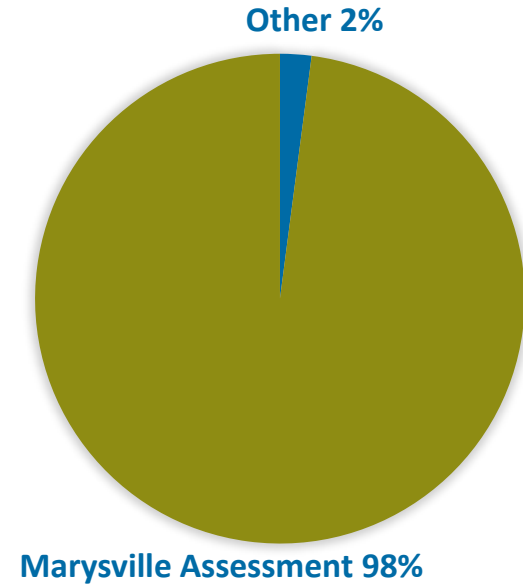
Revenue

- Assessments of \$42,700 (~98%)
- Other (Solid Waste Permits, Pay as you Throw Program, Penalty & Interest, Interest Earnings) of \$902 (~2%)

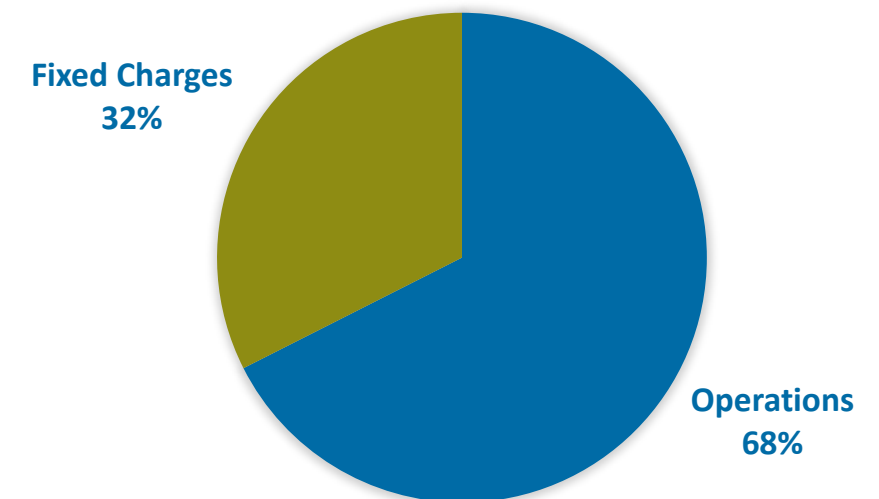
Expenditures

- Operations is \$18,371 (~68%)
- Fixed Charges of \$8,827 (~32%)

REVENUE



EXPENDITURES



County: Marysville

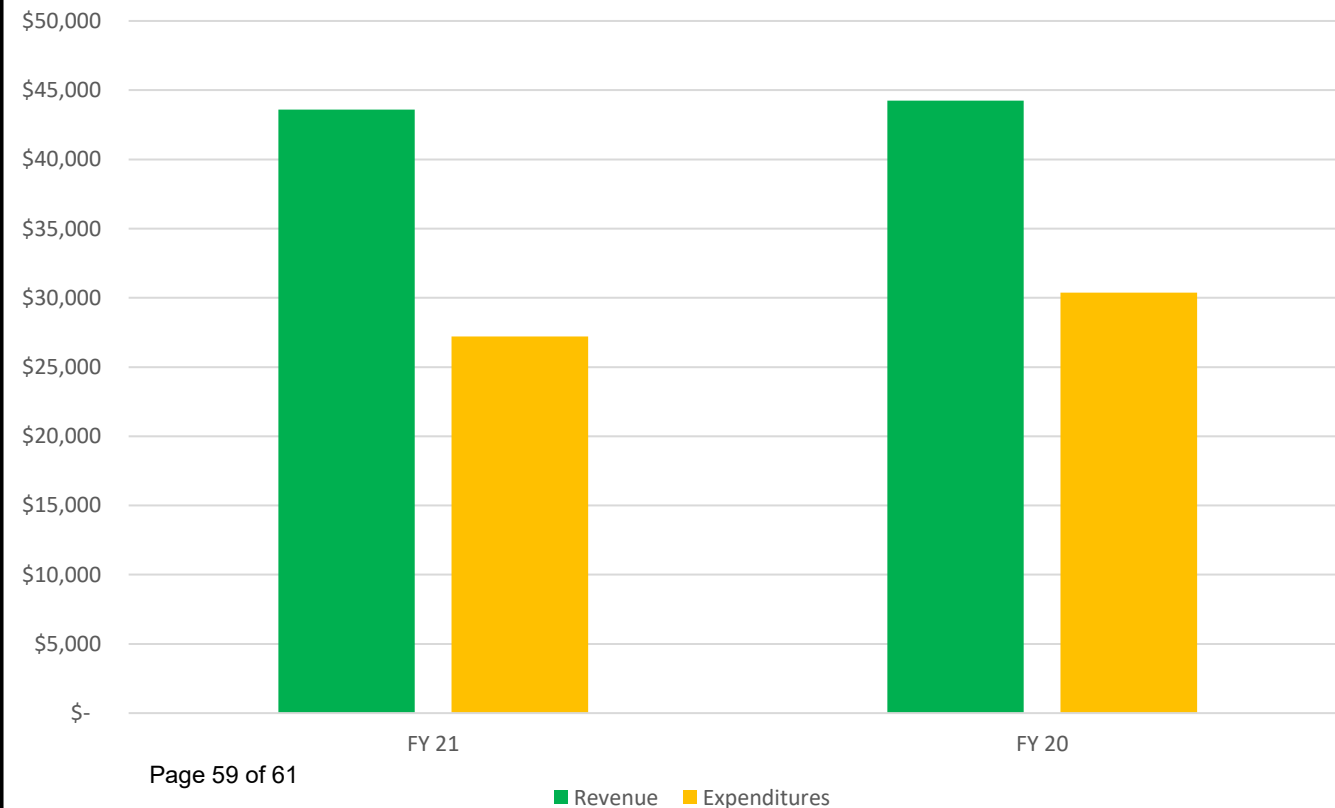
Revenue Compared to Expenditures

FY 21- Revenue = \$43,602
Expenditures = \$27,198
Capital Reserves of \$16,404

FY 20- Revenue = \$44,239
Expenditures = \$30,383
Capital Reserves of \$13,856



Revenue vs. Expenditure FY 21 & FY 20



County Overall

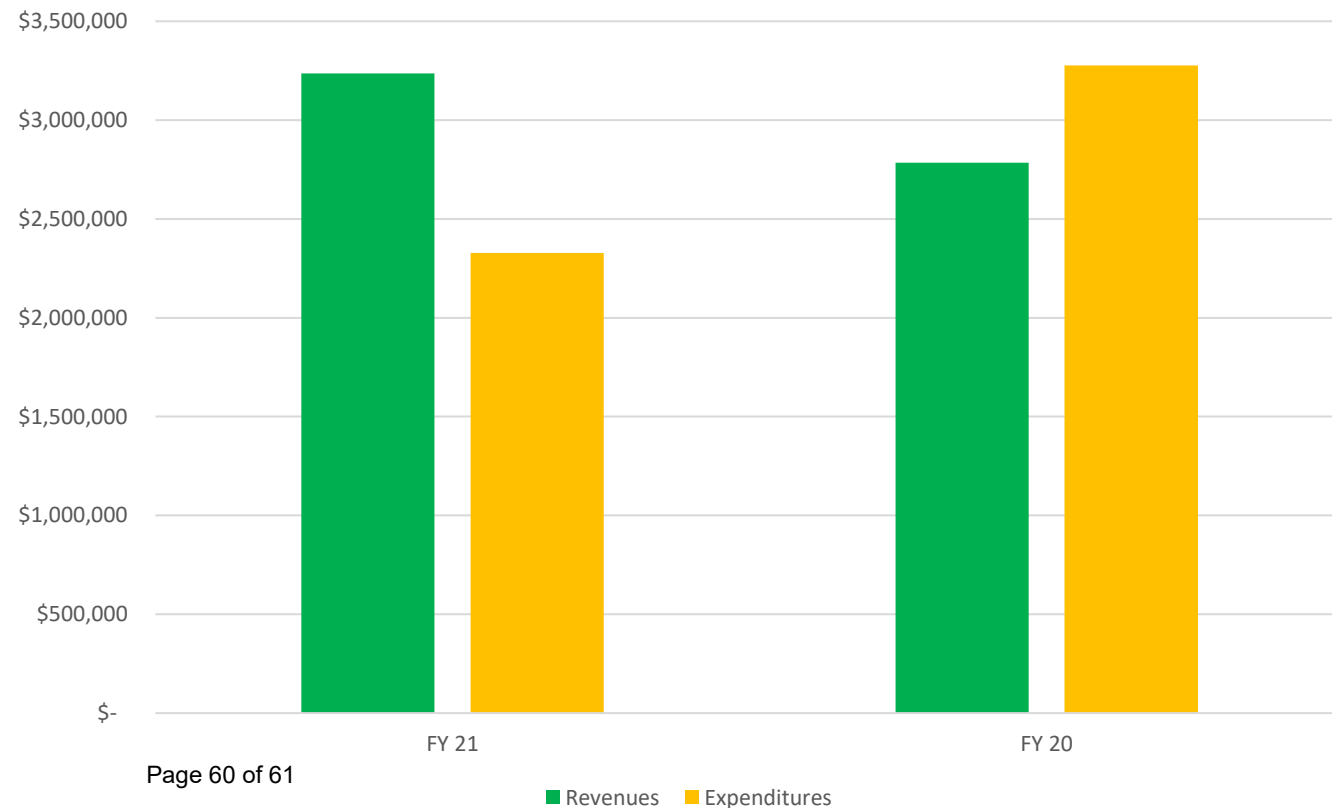
Revenue Compared to Expenditures

FY 21- Revenue = \$3,235,461
Expenditures = \$2,328,133
Total Capital Reserves of \$907,328

FY 20- Revenue = \$2,784,228
Expenditures = \$3,276,330
Total Deficit of \$492,102



Total Revenue vs. Expenditures FY 20 & FY 21



Questions

