ADMINISTRATIVE MEETING

July 6, 2022 - 4:00 PM

City-County Room 326 / Zoom Online Meeting; https://zoom.us/j/95763588449

AGENDA

1. **Call to Work Session, introductions**
2. **Commission comments, questions**
3. **Presentations**
   - **a.** Housing Solutions presentation for the proposed Valley View Village project
   - **b.** Helenas Strategic Plan for Waste Reduction by Zero Waste Associates Pursuant to the City of Helenas Resolution No. 20643
4. **Recommendations from the Helena Citizens Council**
5. **Department Direction/Feedback Needed**
   - **a.** Helena Area Community Foundation FY21/FY22 Grant Report
   - **b.** Fire Service Workplan Update: Review completions from 2007 planning committee recommendations. Provide recommendation on planning committee for 2022 Master Plan.
   - **c.** Wildland Urban Interface Update
   - **d.** Update on the SRO Contract
6. **Public Comment**
7. **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

June 7, 2022

To: Interim City Manager, Tim Burton

From: Housing Coordinator, Kara Snyder
Housing Solutions Representative, Alex Burkhalter
Housing Solutions Representative, Tyler Currence

Subject: Housing Solutions presentation for the proposed Valley View Village project

Present Situation: Staff will be introducing representatives from Housing Solutions, LLC to speak to the Commission about the Valley View Village project proposal.

Proposal/Objective: Representatives are seeking community input following the presentation. Housing Solutions LLC requests the Commission allow for a period of public comment following the presentation, to assess the community interest and need for such a project. No action is required by the Commission.

Notice of Public Hearing: N/A

ATTACHMENTS:
Flyer
Presentation

HOUSING SOLUTIONS

Affordable Senior Living

Valley View Village

HELENA, MONTANA

Unit Mix:
→ 22: 1 Bedroom – 600 sq ft
→ 9: 2 Bedroom – 782 sq ft

Monthly Rental Rates:
→ 1 Bedroom - $650 - $850
→ 2 Bedroom - $775 - $975
→ Monthly rent includes all utilities!

Household Income Range:
→ 1 Person - $27,560 - $41,340
→ 2 Person - $31,480 - $47,220

Unit Amenities:
→ Frost Free Refrigerator
→ Range – Stove/Oven
→ Dishwasher
→ In Sink Disposal
→ Microwave
→ Washer & Dryer in Unit
→ Air Conditioning
→ Large Closets
→ Blinds
→ Bedroom and Living Ceiling Fan
→ Neutral Pain colors
→ Hardwood Cabinets

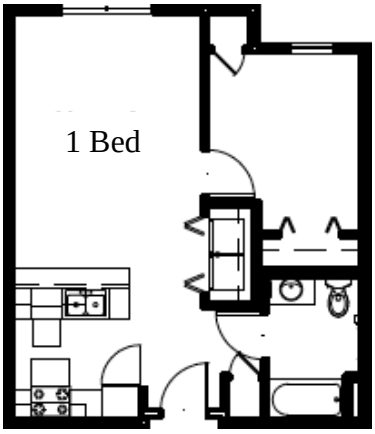
Building Amenities
→ Manager's Office
→ Community Room
→ Patio
→ Elevator
→ Secure Entry

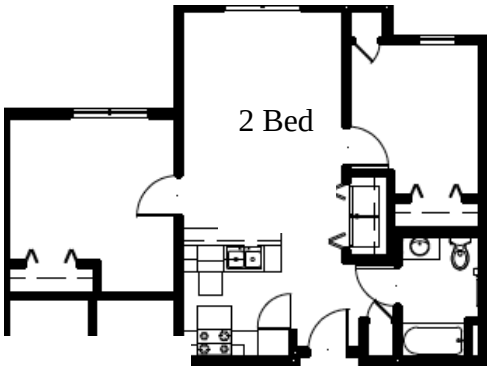
Location Map on Reverse

Valley View Village is designed with convenience, community and safety for today's active senior citizens at an affordable price. Our age 55 and older residents will find Valley View Village to be in a great location. The property is located off of Butte Ave., only one block north of Prospect Avenue. Safeway, CVS, Walgreens, Albertsons, Sage Medical, PureView Health Center and many local eateries as well as other amenities are nearby making this the perfect location for a senior property.

Valley View Village will be a mix of 31 one- and two-bedroom apartment homes. The large community room and patio can be enjoyed with both old and new friends. In addition to all essential appliances, each apartment home will include a washer/dryer, the convenience of an elevator and the security of a controlled entry building.

Floor Plans:



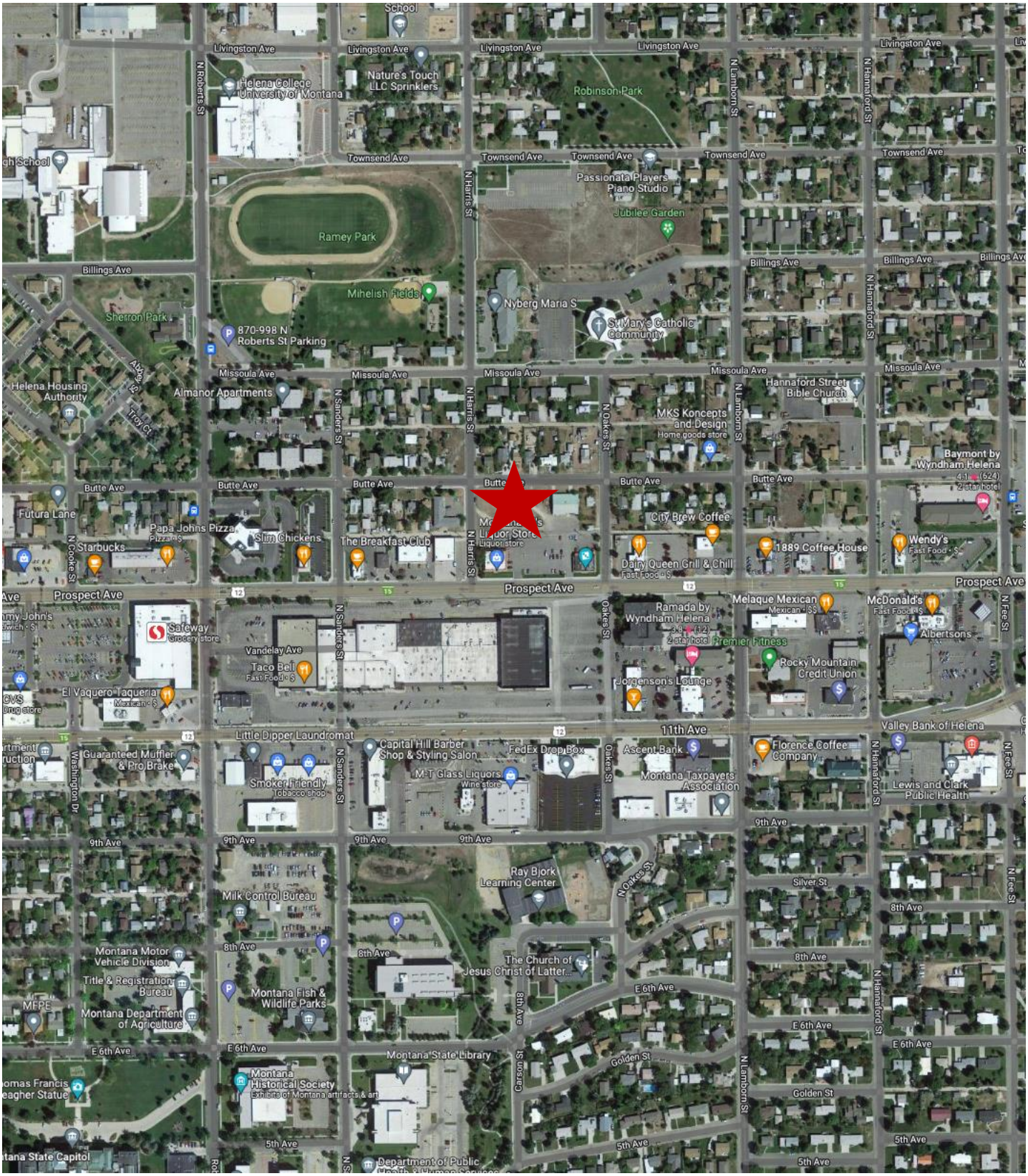


Would you like to help?
Housing Solutions, LLC is currently pursuing Housing Tax Credits from the Montana Board of Housing to make this low rent and income project a reality. If you would like any further information about the project or would like to express your support, please contact us.

Affordable Senior Living

Valley View Village

HELENA, MONTANA



VALLEY VIEW VILLAGE

Affordable Senior Living

HOUSING SOLUTIONS

Helena, Montana

Introduction

- Housing Solutions LLC
  - Formed in 2012
    - 9 Properties Completed
    - 3 States
      - Montana - Kalispell, Missoula, Glendive, Polson
      - North Dakota – Dickinson
      - Wyoming – Casper, Cody, Evanston
- Alex Burkhalter
  - 18 Years Experience
    - 21 Properties
    - 801 Apartment Homes
    - Montana, North Dakota, Wyoming

Senior Projects

Meadowlark Vista, Casper, WY

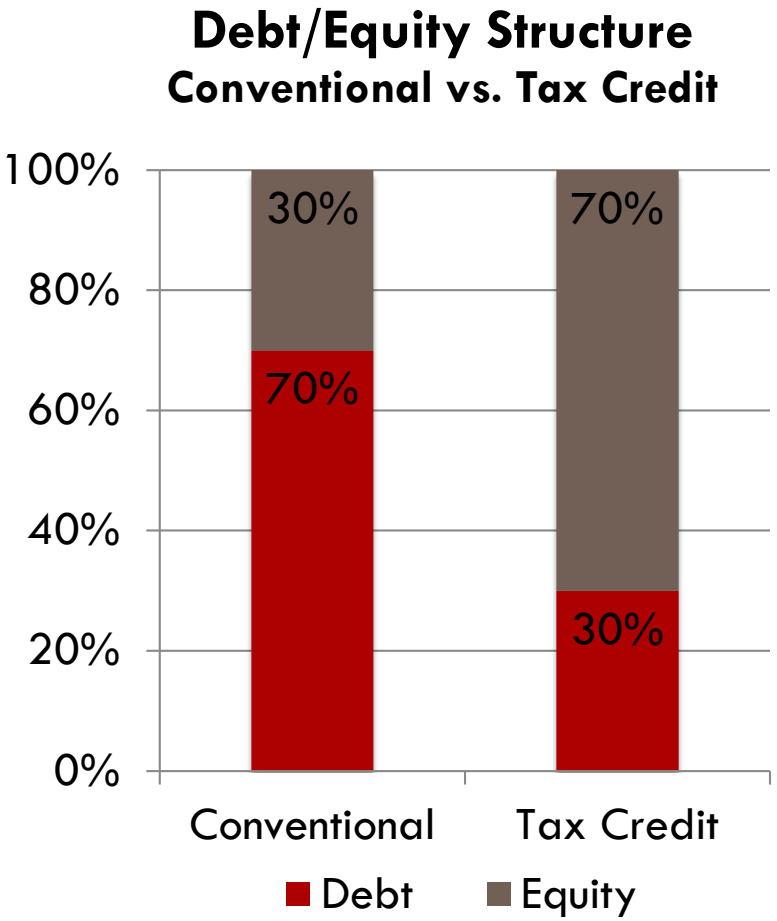
Aspen Place, Missoula, MT

Skyview, Missoula, MT

Depot Place, Kalispell, MT

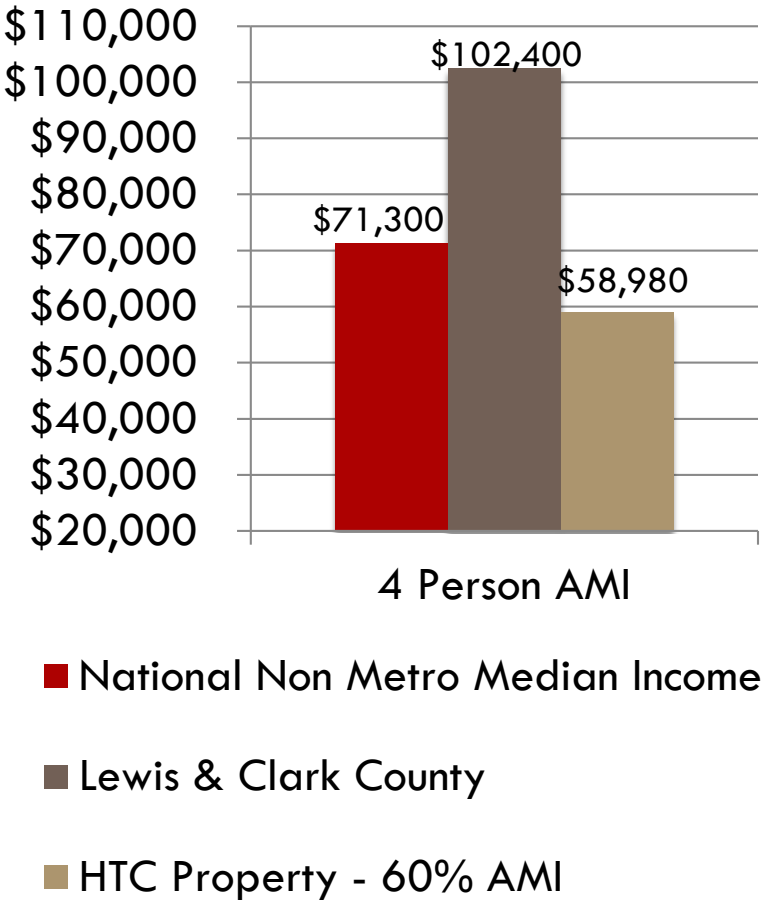
Housing Tax Credits

- Federal Program, enacted 1986
- 90% of New Affordable Rental Housing created with HTCs
- Administered by Individual States
- Success comes from Public/Private Partnership
- Assistance with Construction and Development Costs
  - By creating tax incentive for Investors, equity is increased, and debt is lowered.
  - Lower debt servicing allows lower rents.
  - No rental or operating assistance



HTC's – Who Do They Serve?

- For Households at or below 60% AMI - Figures Published by HUD Annually
  - Lewis & Clark County Income Limit @ 60% AMI 4 people - $58,980
  - Lewis & Clark County Income @ 100% AMI 4 People $102,400
- Some units targeted deeper
  - 40% and 50%
- Typical resident is in entry level position
  - Retailers, Hotel's, Quick Service Food
- Elderly on fixed income

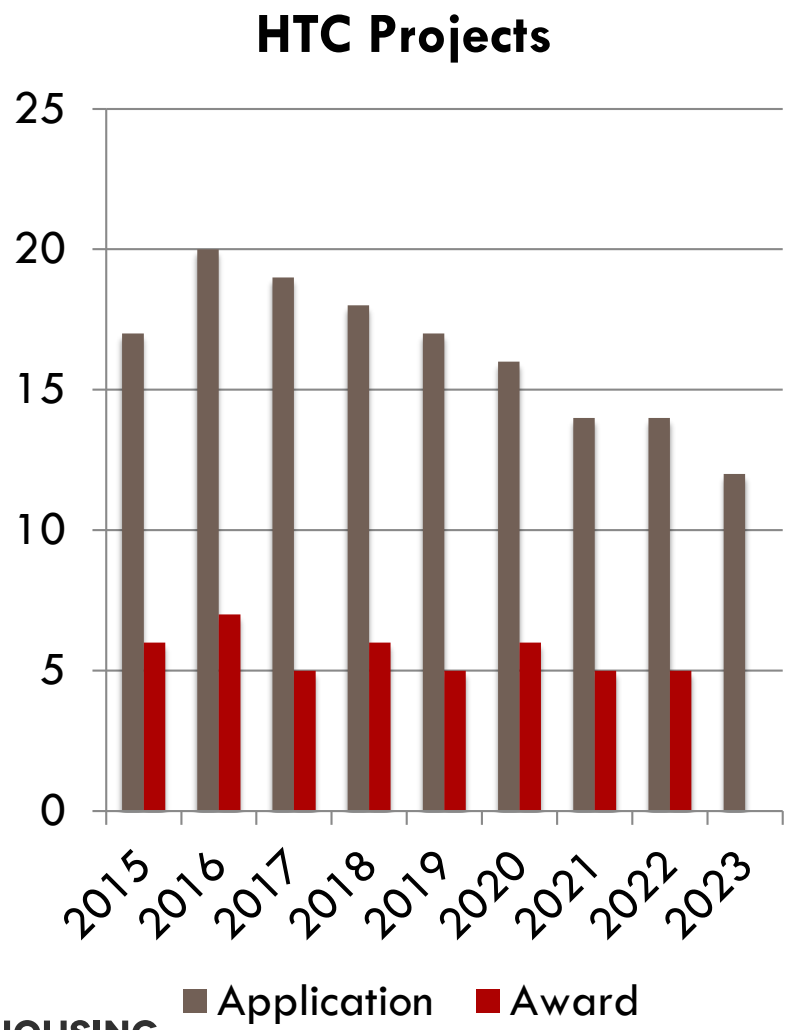


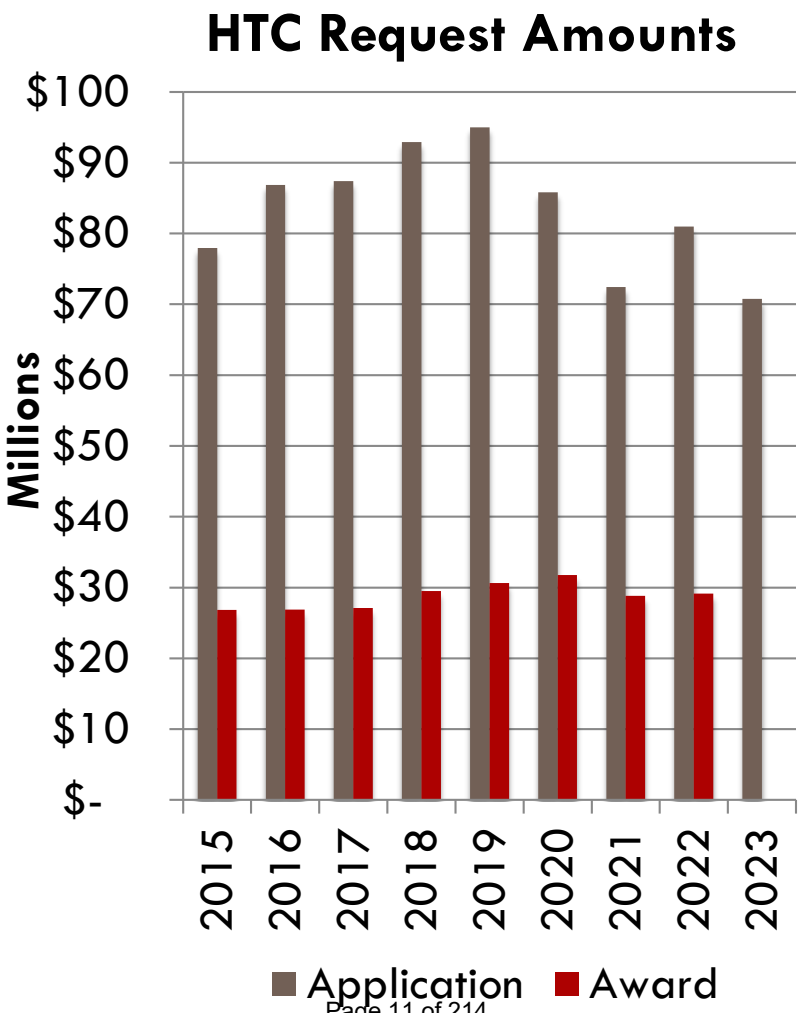
HOUSING SOLUTIONS

Montana Housing

- State Agency (a division of the Department of Commerce) designated by the IRS to administer the the program
- 7-person board – appointed by Governor
- Monitors projects under development and throughout operations
- Enforcement of remedies against non-compliant projects
- Tasked with awarding the Housing Tax Credits annually
- Publish the Qualified Allocation Plan
- ***Very strong demand for this valuable resource***

Housing Tax Credits in Montana





HOUSING SOLUTIONS

2023 Round Letter's of Intent

Name	City	Units	Request
ANHA LIHTC #2	Crow Agency	37	$6,435,000
Valley Court Apts	Glasgow	12	$3,490,000
Bigfork Senior Housing	Bigfork	24	$3,594,600
Cherry Orchard	Kalispell	24	$6,180,000
Cabinet Aff Housing	Libby	24	$6,500,000
Meadowlark	Butte	30	$6,500,000
Creekside Apts 9%	Missoula	40	$5,750,000
Sage Grouse Homes	Miles City	26	$6,500,000
Yellowstone Plaza 9%	Belgrade	30	$6,400,000
Centennial Village	Great Falls	48	$6,500,000
Valley View Village	Helena	31	$6,500,000
Carter Commons	Great Falls	25	$6,400,000
Total Requested			**$70,749,600**

2023 Round Letter's of Intent

Name	City	Units	Request
ANHA LIHTC #2	Crow Agency	37	$6,435,000
Cabinet Aff Housing	Libby	24	$6,500,000
Meadowlark	Butte	30	$6,500,000
Creekside Apts 9%	Missoula	40	$5,750,000
Sage Grouse Homes	Miles City	26	$6,500,000
Yellowstone Plaza 9%	Belgrade	30	$6,400,000
Valley View Village	Helena	31	$6,500,000
Carter Commons	Great Falls	25	$6,400,000
Total Requested			**$50,985,000**

HOUSING SOLUTIONS

A PROJECT FOR HELENA?

Affordable Senior Living

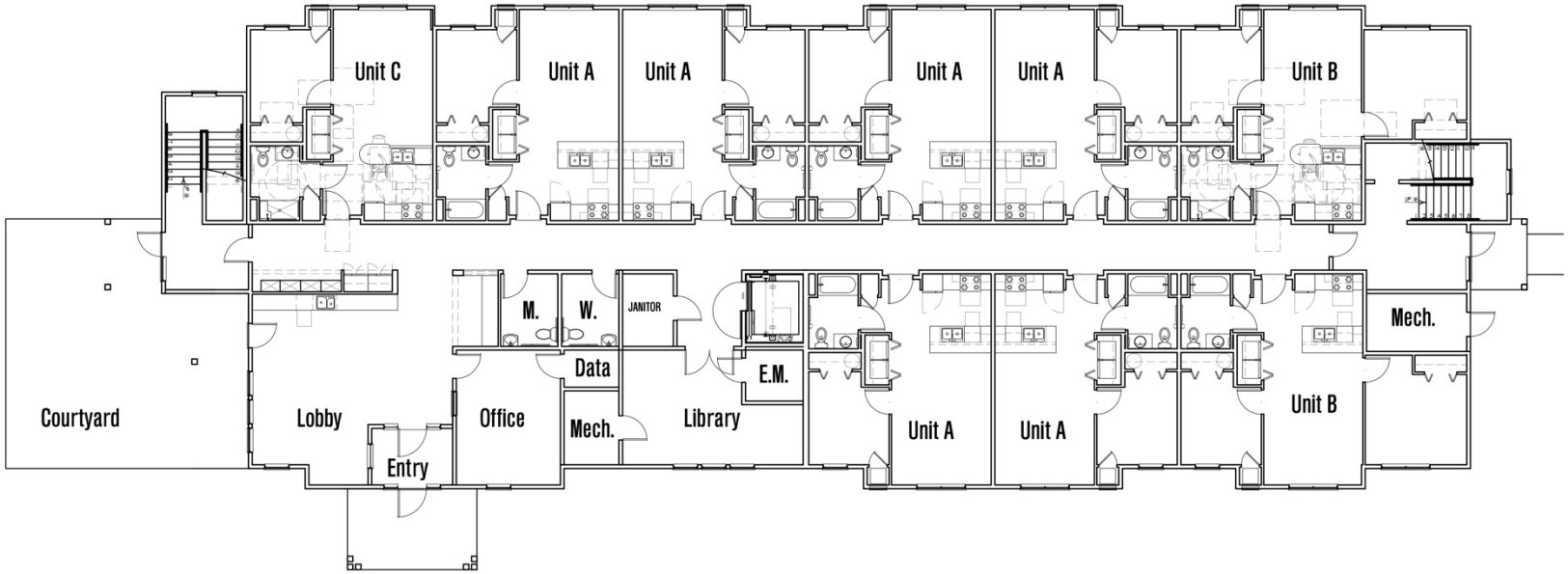
HOUSING SOLUTIONS

Helena, Montana

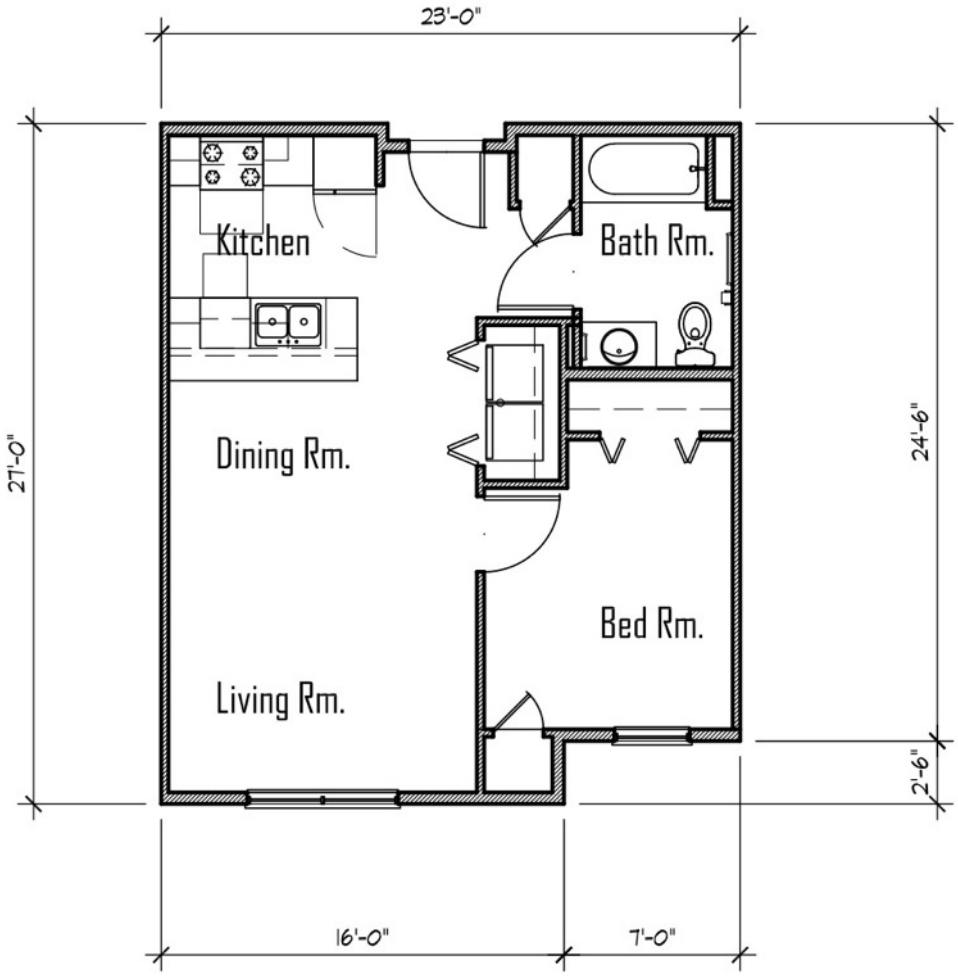
Project Highlights

- 31 Homes
  - For age 55+
  - 1 & 2 bed homes
  - New construction
  - Rents from $650-$975
- Community
  - Onsite Manager's Office
  - Community Room with Kitchen
  - Outdoor Patio
  - Crafting/multipurpose space
  - Card and Billiards room
  - Elevator Service
  - Secured Building Entry
- Energy & Green
  - LED Exterior Lighting
  - Motion sensing, dimmable switches
  - Energy Star Appliances
  - Low VOC paints and adhesives
  - Formaldehyde free laminates
  - Water efficient Landscaping
  - Smoke Free Policy
  - Project Location, walkable!
  - Redevelopment site

Building Concept



Unit Floor Plan



Location

W Custer Ave
W Custer Ave
W Custer Ave
N Montana Ave
N Montana Ave
Green Meadow Country Club
Spring Meadow State Park
Henderson St
N Benton Ave
N Benton Ave
Bill Roberts Golf Course
Euclid Ave
N Last Chance Gulch
Helena
11th Ave
E Broadway St
E Broadway St
E Broadway St
US Highway 287 N
280
280
430
430
15
15
15
15

Location

Affordability

Rental Rates

84% of the homes are here

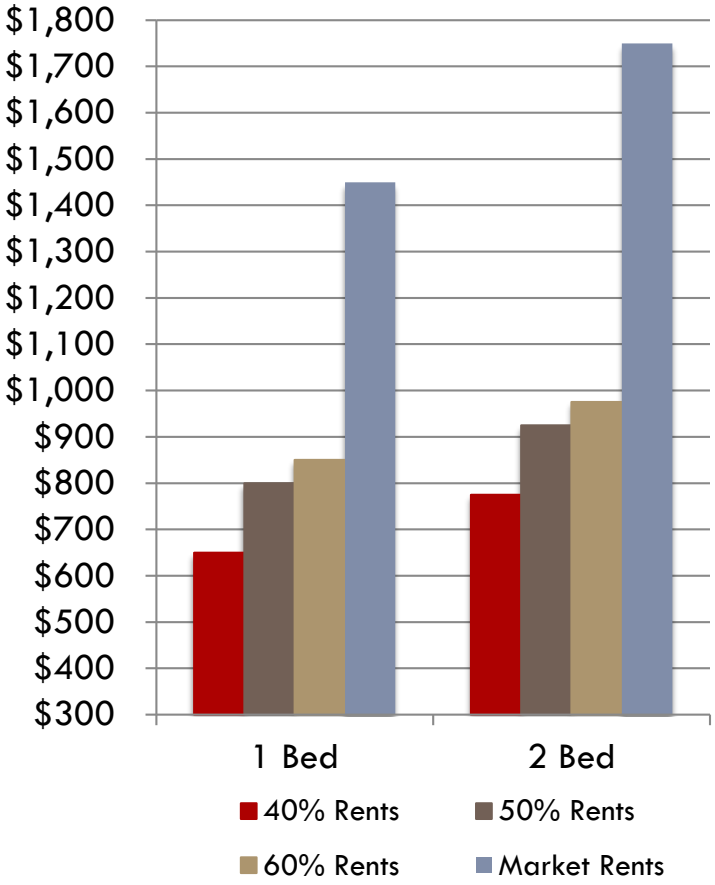
AMI	40%	50%	60%	Market Rents
1 Bed	$650	$800	$850	$1,450
2 Bed	$775	$925	$975	$1,750

Valley View Village rents include all utilities!

Resident Income Limits

Size	40%	50%	60%
1 Person	$27,560	$34,450	$41,340
2 Person	$31,480	$39,350	$47,220

Monthly Rental Rates



HOUSING SOLUTIONS

Preliminary Market Study

- Senior Homes Needed!
  - 189 new SENIOR homes needed today!
  - Senior population is fastest growing segment in Helena
    - 55+ 2.4% - 3x general pop
    - 65+ 4.9% - 6x general pop
  - Low capture rate at 15.9%
  - Helena has not had a new construction senior award in last 10 years

HOUSING SOLUTIONS

Development Timeline

- Application and Award
  - Letter of Intent – April 11th
  - Invitation to Apply – May 17th

July 6th

  - Complete Application Due – August 1st
  - Projects Selected for Awards – October 17th
- Development
  - Complete Plans & Construction Start – June 2023
  - Construction Complete – June 2024

HOUSING SOLUTIONS

VALLEY VIEW VILLAGE

Affordable Senior Living

HOUSING SOLUTIONS

Helena, Montana

City of Helena, Montana

June 21, 2022

To: Interim City Manager, Tim Burton

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

Subject: Helenas Strategic Plan for Waste Reduction by Zero Waste Associates Pursuant to the City of Helenas Resolution No. 20643

Present Situation: On February 22, 2021, the City Commission adopted Resolution No. 20643 (Resolution). The Resolution established solid waste reduction goals and a method to achieve those goals for the City of Helena. In the resolution, the City Commission directed the City Manager, in collaboration with the Citizen Conservation Board, to "develop a Strategic Plan for Waste Reduction in Helena ("Strategic Plan") using the principles of "refuse, reduce, reuse, recycle, and compost" for presentation to the Helena City Commission by June 30, 2022." The Resolution was adopted in response to the new Growth Policy the City adopted in June 2020, consistent with Montana's Integrated Waste Management Act.

The City of Helena hired Zero Waste Associates from Missoula to create a final draft of the Strategic Plan. The Strategic Plan identified a base line of Helena's current waste stream from which to measure the City's future success and is designed to achieve the goal of City solid waste diversion from the landfill at a minimum of 50% by 2040, with an interim minimum goal of 35% by 2030. During creation of the Strategic Plan, multiple Public Meetings were held with total attendance of over 100+ individuals. A survey was posted to the Be Heard Helena webpage that generated 176 citizen responses and an ideas board was generated that received 21 citizen ideas.

Based on 2019 data (pre-COVID), the City's current diversion rate was calculated at approximately 26%. Based on Helena's current diversion and potential for diversion, 10 Waste Reduction Initiatives are proposed with implementation occurring over three phases. The associated cost for each phase and initiative are broken down and approximate diversion rates for each estimated.

Phase 1 covers education and incentives with specific initiatives for community education, community incentives, community reuse support, and for the City to lead by example. The initiatives introduced in Phase 1 would continue through Phase 2 and Phase 3.

Phase 2 covers new services and infrastructure with specific initiatives for recycling and composting infrastructure, universal residential curbside collection, and self-haul diversion options. The timeline for implementation is approximately 5-years and would begin after implementation of Phase 1 (ex. 2025-2030). At the conclusion of Phase 2, the Strategic Plan anticipates the City will conduct an evaluation to assess whether progress towards the waste reduction goal of 35% by 2030 had been achieved and if the goal of 50% by 2040 appears attainable. If the City does not achieve the interim goal and is not trending toward the 2040 goal, Phase 3 could be implemented.

Phase 3 covers new policies with specific initiatives for implementing a Hauler Equal Volume Diversion Ordinance, Community Recycling Ordinance, and a Construction, Deconstruction, and Demolition Ordinance. The timeline for implementation is 9 years and would begin after implementation of Phase 2 (ex. 2031-2040). Phase 3

would only be considered if it is necessary to reach the 2040 diversion goal.

The Strategic Plan has provided the City with a baseline of current diversion rates and a path forward for further potential diversion. The Strategic Plan preceded the development of the City-County Integrated Solid Waste Master Plan and is available to inform it.

Proposal/Objective: n/a

Notice of Public Hearing: N/A

ATTACHMENTS:
Helena Waste Reduction Commission Presentation
Helena Strategic Plan for Waste Reduction

City of Helena

Wednesday, June 15, 2022

Strategic Plan for Waste Reduction

City Commission Presentation

Zero Waste Associates

Agenda

I. Helena's Waste Reduction Goal
II. Impacts of Waste
III. Planning Process Summary
IV. Waste Reduction Strategies for Helena
V. Impacts of Waste Reduction Strategies
VI. Key Takeaways

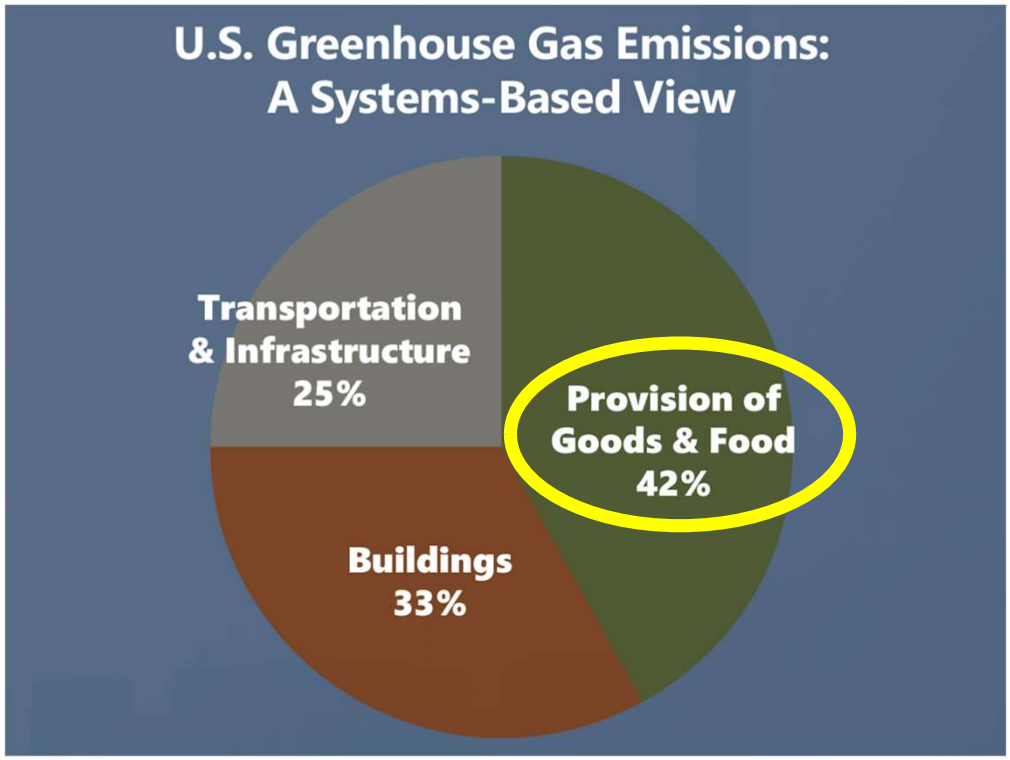
The Goal - 50% by 2040

February 2021 - Resolution No. 20643

"The City Commission directs the City Manager, in collaboration with the Citizen Conservation Board, to develop a Strategic Plan for Waste Reduction in Helena ("Strategic Plan") using the principles of "refuse, reduce, reuse, recycle, and compost" for presentation to the Helena City Commission by June 30, 2022."

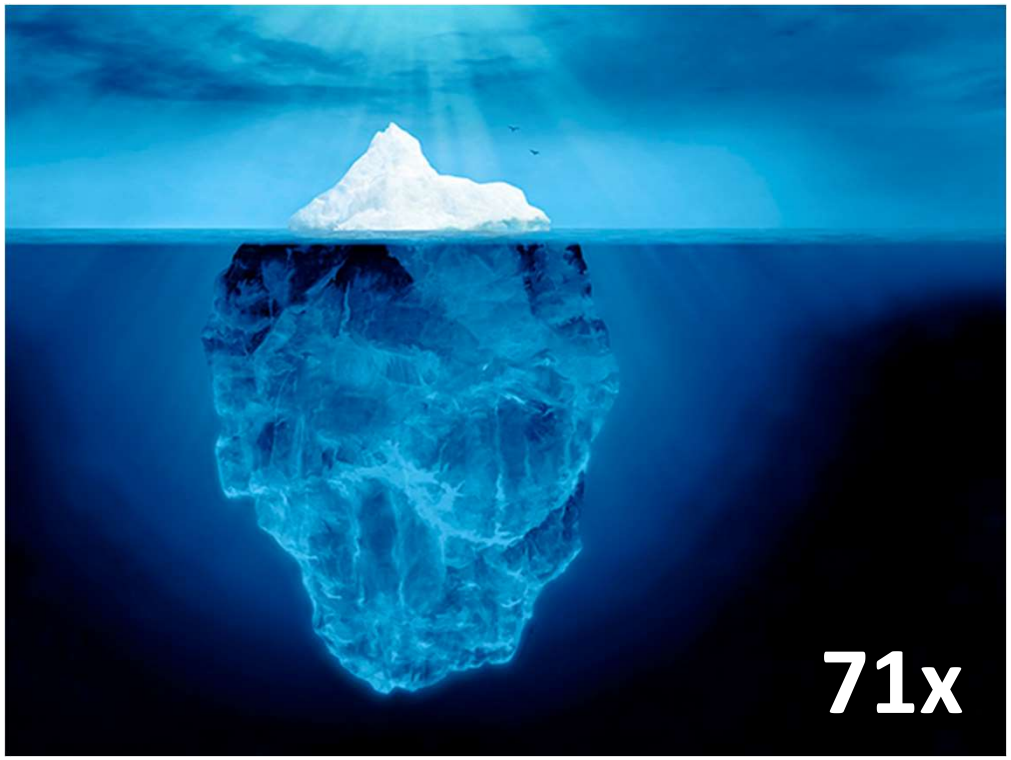
- Minimum of 50% solid waste diversion from the landfill by 2040
- Interim minimum goal of 35% by 2030

Impacts of Waste



source: Opportunities to Reduce Greenhouse Gas Emissions through Materials and Land Management Practices, September 2009 (epa.gov)

Impacts of Waste



source: Stop Trashing the Climate Report. June 2008. (ilsr.org)

Planning Process

Public Meetings

- *100+ attendees*

Interviews

- *XX stakeholders*

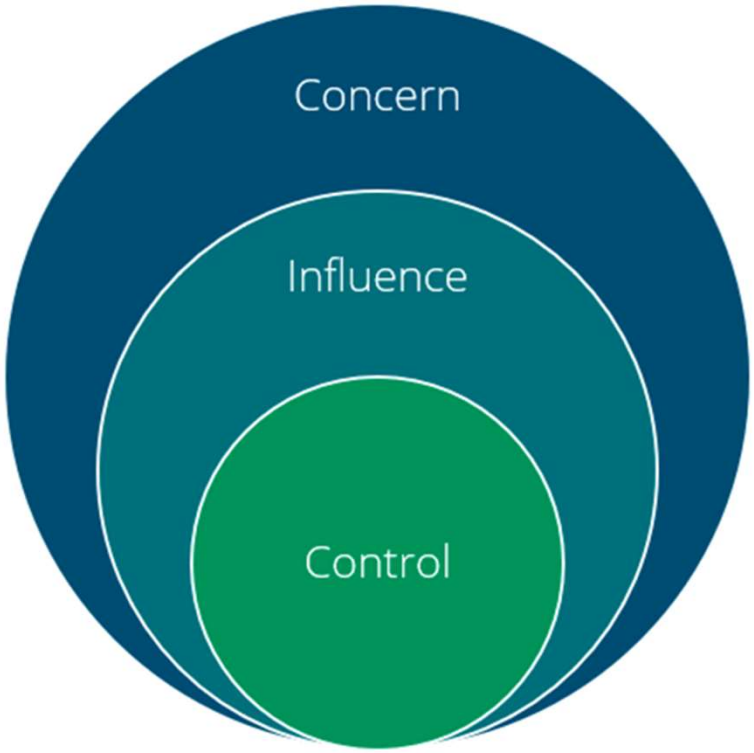
Be Heard Helena Survey & Idea Board

- *176 respondents / 21 ideas*

Presentations

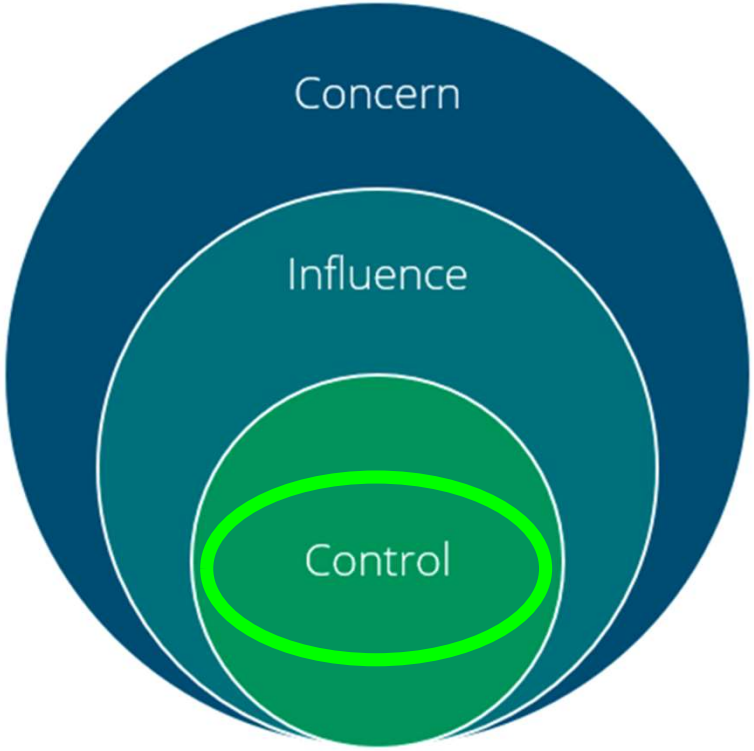
- *6 – CCB, Hometown Helena, Helena BID members & trustees, the City/County Consolidated Parks Board*

Waste Reduction Strategies for Helena



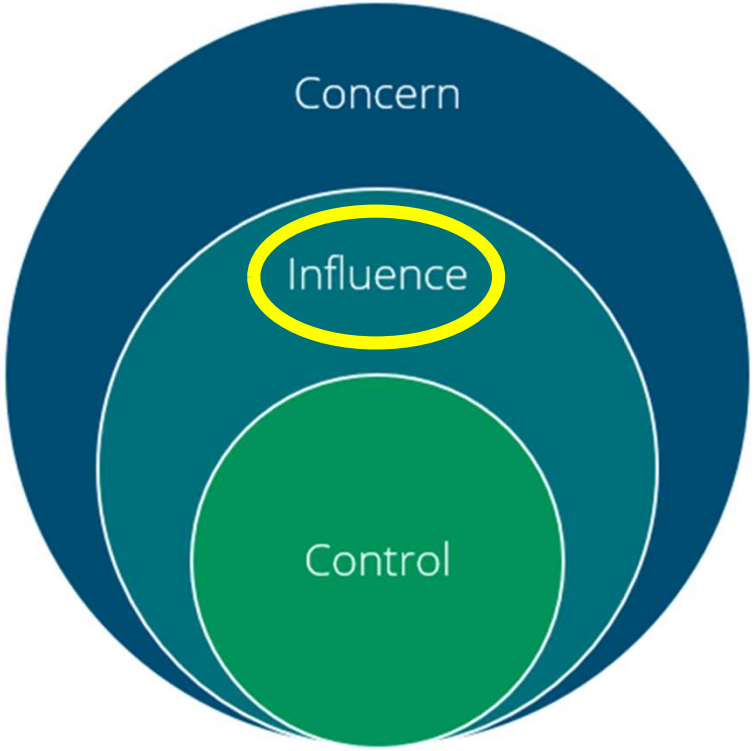
Stephen Covey, The 7 Habits of Highly Successful People

Waste Reduction Strategies for Helena



Stephen Covey, The 7 Habits of Highly Successful People

Waste Reduction Strategies for Helena



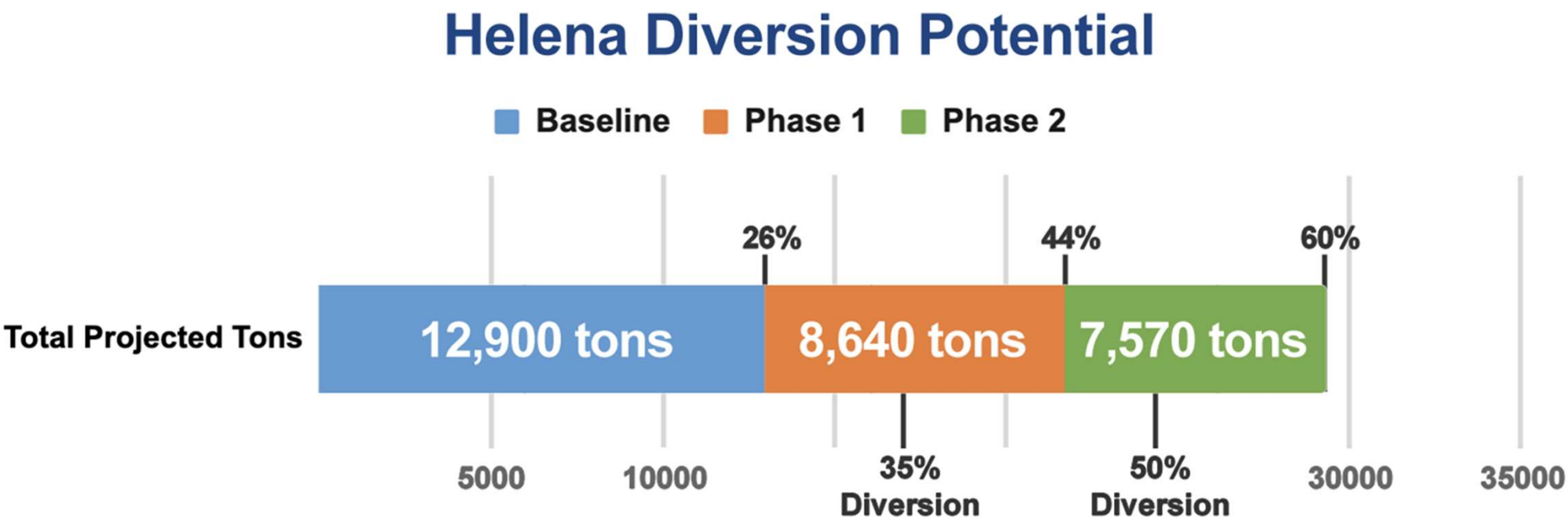
Stephen Covey, The 7 Habits of Highly Successful People

Waste Reduction Strategies for Helena

Phased approach:

- Phase 1 – Education & Incentives (implementation: 2022-2024)
- Phase 2 – New Services & Infrastructure (implementation: 2025-2030)
- Phase 3 – New Policies (implementation: 2031-2040)

Waste Reduction Strategies for Helena



Waste Reduction Strategies for Helena

Phase 1 – Education & Incentives				
2022	2025	2030	2031	2040

Waste Reduction Strategies for Helena

Phase 1 – Education & Incentives				
	Phase 2 – New Services & Infrastructure			
2022	**2025**	**2030**	**2031**	**2040**

Waste Reduction Strategies for Helena

<table>
<tr><td colspan="4">Phase 1 – Education & Incentives</td><td rowspan="3"></td></tr>
<tr><td></td><td>Phase 2 – New Services & Infrastructure</td><td rowspan="2">Interim goal assess-ment</td><td></td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>2022</td><td>2025</td><td>2030</td><td>2031</td><td>2040</td></tr>
</table>

Waste Reduction Strategies for Helena

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<tr><td></td><td></td><td>Phase 3 – New Policies
(if necessary or if new goal adopted)</td></tr>
<tr><td>2022</td><td>2025</td><td>2030</td><td>2031</td><td>2040</td></tr>
</table>

Waste Reduction Strategies for Helena

- **Phase 1 – Education & Incentives (2022-2024)**
  - Community Education
  - Community Incentives
  - Community Reuse Support
  - Lead by Example

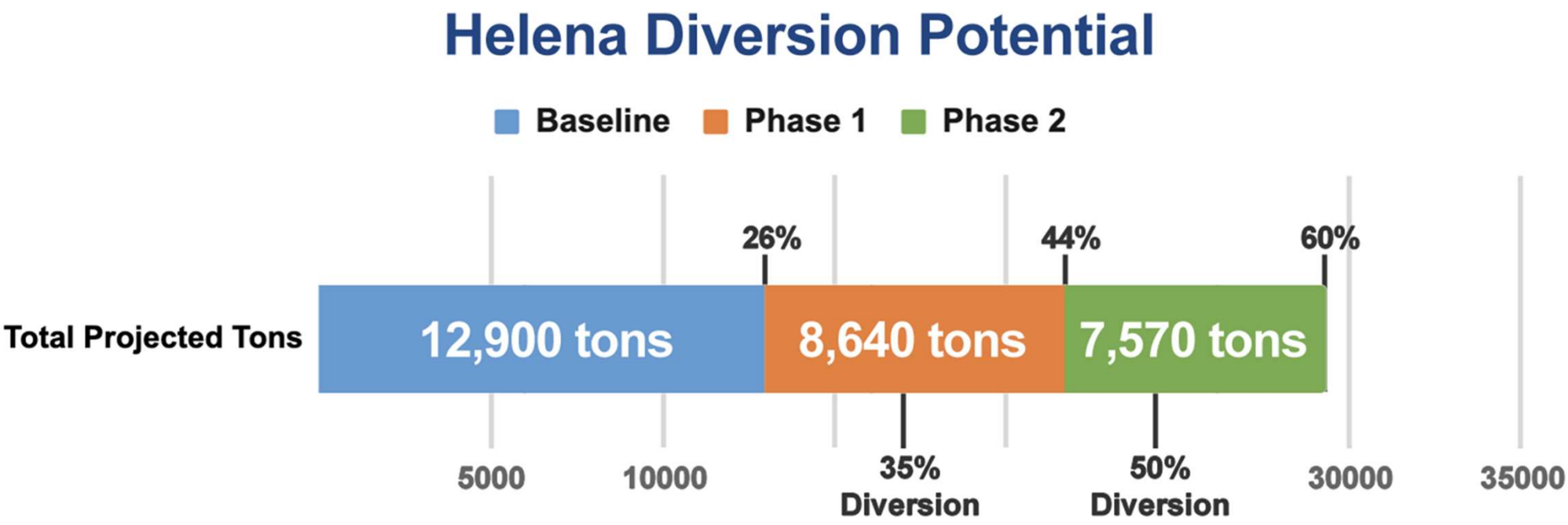
Waste Reduction Strategies for Helena

- **Phase 2 – New Services & Infrastructure (2025-2030)**
  - Recycling & Composting Infrastructure
  - Universal Residential Curbside Collection
  - Self-Haul Diversion Options

Waste Reduction Strategies for Helena

- **Phase 3 – New Policies (2031-2040)**
  - Hauler Equal Volume Diversion Ordinance
  - Community Recycling Ordinance
  - Construction, Deconstruction, & Demolition Ordinance

Phase 1 & Phase 2 Impacts – Diversion



Phase 1 & Phase 2 Impacts – Annual GHG Reduction

22,500 $MTCO_2e$ =

4,848

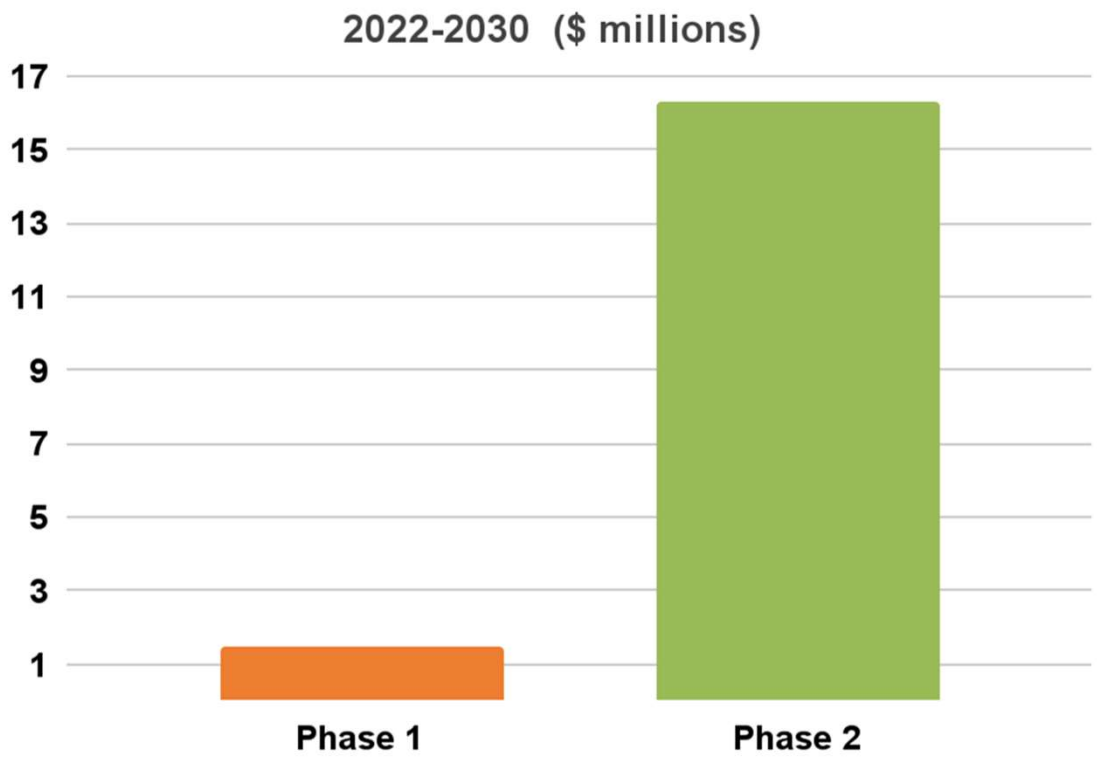
Passenger vehicles driven for one year

2,834

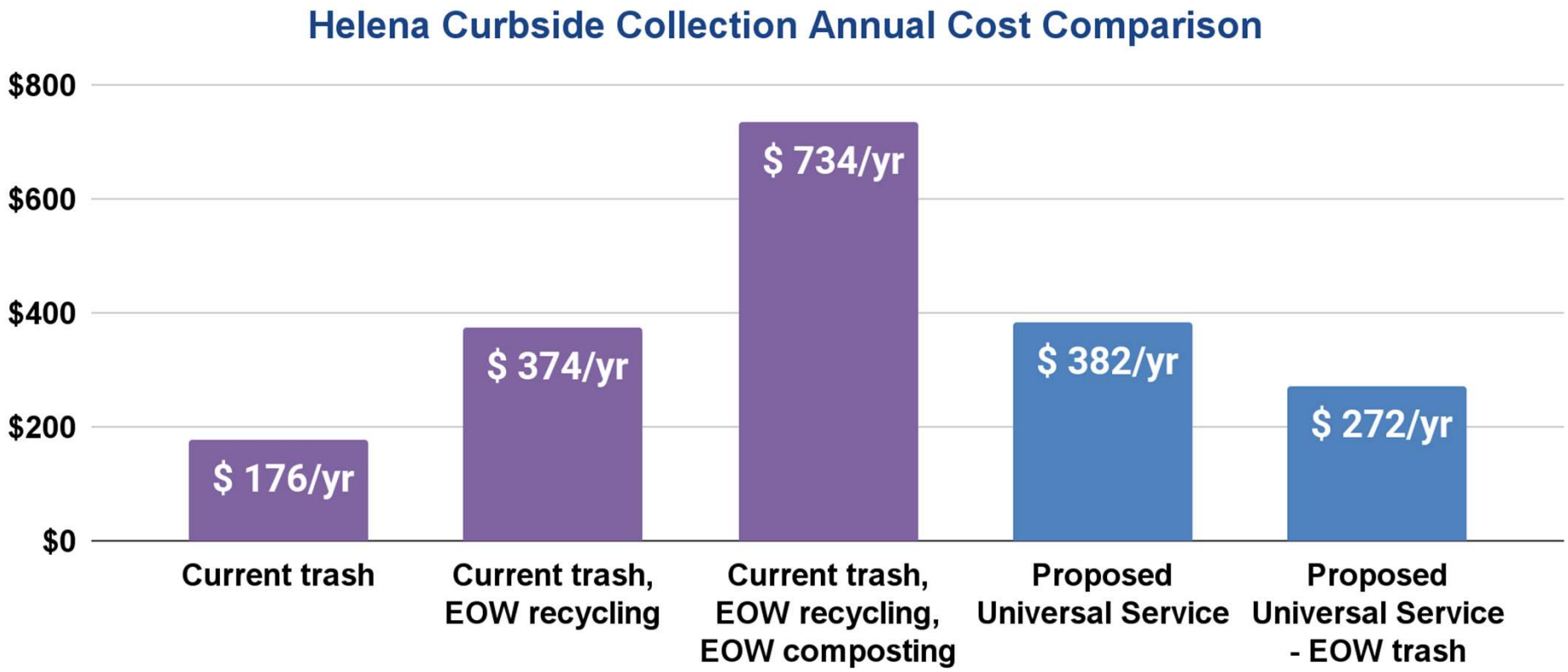
homes' energy use for one year

Source: U.S. EPA Greenhouse Gas Equivalencies Calculator

Phase 1 & Phase 2 Impacts – Costs

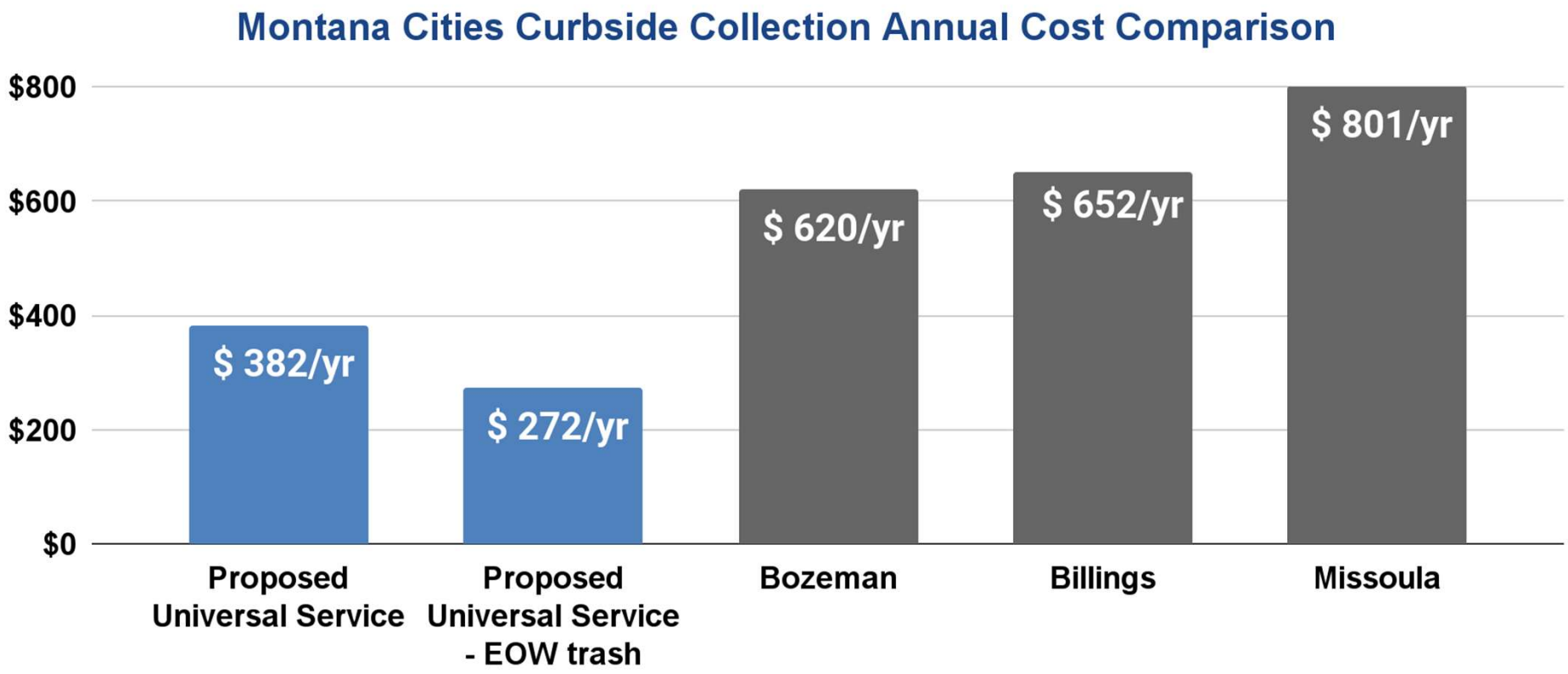


Initiative 2.6 – Helena Annual Costs



The current cost for trash, recycling, and compost collection is nearly double the cost of Universal Service and more than 2.5x the cost of Universal Service with every-other-week trash collection.

Initiative 2.6 – Montana Cities Annual Costs



Key Takeaways

- Helena is ready
- The goal is attainable
- 2.6 Universal Collection is cost competitive with other Montana cities

Thank you!

Jeremy Drake
jeremy@strategyzerowaste.com
(406) 493-5793

City of Helena

Est. 1881

Strategic Plan for Waste Reduction

Final Draft

June 2022

Acknowledgements

City of Helena Strategic Plan for Waste Reduction

The Helena residents and businesses who participated in the planning process are acknowledged for their various contributions to the City of Helena Strategic Plan for Waste Reduction. The board members and staff listed below are also acknowledged for their contributions. The collective efforts of those involved have made this planning effort a success and are greatly appreciated.

Final draft presented to Helena City Commission on June 15, 2022.

Helena Citizen Conservation Board

Ann Brodsky
Denise Roth Barber

City of Helena Public Works Department

Ryan Leland
Ed Coleman
Pete Anderson
Jacki Pierson
Leea Anderson
Holly Chandler

Consultants

Zero Waste Associates, Missoula MT

Cover Thumbnail Photos (L-R):

City of Helena Transfer Station courtesy of City of Helena
Jeff Kuhn courtesy of Queen City Wheel House
Dave Anderson (employee) and Elinor Miller (volunteer) courtesy of Helena Food Share

Table of Contents

Executive Summary **ES•1**

Introduction **1•1**
- Background 1•1
- Impacts of Waste 1•2
- Current Policies, Programs, and Infrastructure 1•3
- Diversion, Disposal, and Generation 1•6

Planning Process **2•11**
- Community Outreach 2•11
- Community Events 2•12
- City-County Integrated Solid Waste Master Plan 2•12

Waste Reduction Initiatives **3•13**
- Initiatives Overview 3•13
- Phase 1 – Education & Incentives 3•14
- Phase 2 – New Services & Infrastructure 3•18
- Phase 3 – New Policies as Needed 3•20
- Phase 1 and Phase 2 Initiatives Impacts 3•23

Key Program Component Evaluations **4•27**
- Education and Outreach 4•27
- Residential Recycling Collection System Report 4•30
- Legislative Diversion Actions 4•31
- Available Federal Funding 4•31

Appendices
- Appendix A – Diversion, Disposal, and Generation Methodology A•1
- Appendix B – Waste Reduction Initiative Summaries B•1
- Appendix C – Impact Analysis Methodology C•1
- Appendix D – Community Partner Initiatives D•1
- Appendix E – Legislative Diversion Actions E•1
- Appendix F – Community Outreach and Engagement F•1

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BATTERIES

Executive Summary

In 2021, the City Commission of Helena, Montana adopted Resolution 20643, which established a goal for the City to reduce solid waste disposal to landfills by 50% by 2040, with an interim target of 35% reduction by 2030.[1] The resolution called for the development of a Strategic Plan for Waste Reduction (Strategic Plan) designed to achieve the City's goals.

This Strategic Plan is specific to the City of Helena and all generators of discarded materials within the corporate city limits. It was developed through a robust public participation process with input from a variety of Helena community stakeholders. This plan includes information about Helena's current policies, programs, and infrastructure regarding the management of discarded materials as well as data and analysis regarding Helena's current materials diversion, disposal, and generation. Issues of particular interest to the City of Helena including the role of education and outreach, consideration of approaches to increase diversion through residential curbside recycling, and legislative approaches to increase diversion are also addressed.

At the heart of this plan is a list of 10 recommended waste reduction initiatives organized in three phases of implementation.

Phase 1 – Education & Incentives (Implementation Timeframe: 2022-2024)

1.1 – Community Education
1.2 – Community Incentives
1.3 – Community Reuse Support
1.4 – Lead by Example

Phase 2 – New Services & Infrastructure (Implementation Timeframe: 2025-2030)

2.5 – Recycling & Composting Infrastructure
2.6 – Universal Residential Curbside Collection
2.7 – Self-Haul Diversion Options

Phase 3 – New Policies as Necessary (Implementation Timeframe: 2031-2040)

3.8 – Hauler Equal Volume Diversion Ordinance
3.9 – Community Recycling Ordinance
3.10 – Construction, Deconstruction, & Demolition Ordinance

1 https://www.helenamt.gov/fileadmin/user_upload/Commission/Resolutions/2021/Res_20643_-_CCB_Waste_Reduction.pdf

The table below shows the planned implementation schedule, projected diversion, projected greenhouse gas reduction, and the resources that will be needed to implement the Phase 1 and Phase 2 waste reduction initiatives.[1] This Strategic Plan anticipates the City will conduct an evaluation at the conclusion of Phase 2 to assess progress toward the waste reduction goal to determine if the 35% by 2030 goal has been achieved and the 50% by 2040 goal appears attainable. If it is determined that the City has not surpassed the interim goal and is not trending toward the 2040 goal, the Phase 3 policies can be evaluated for future implementation.

Waste Reduction Initiatives	Phase	Projected Diversion (tons)	Projected GHG Reduction ($MTCO_2e$)	One-Time Costs ($)	Annual Costs ($)
1.1 – Community Education	Phase 1 (2022-24)	4,030	5,650	8,500	115,600
1.2 – Community Incentives	Phase 1 (2022-24)	3,090	3,880	8,500	7,000
1.3 – Community Reuse Support	Phase 1 (2022-24)	560	1,460	8,500	7,000
1.4 – Lead by Example	Phase 1 (2022-24)	960	1,470	5,200	12,000
2.5 – Recycling and Composting Infrastructure	Phase 2 (2025-30)	850	1,330	11,200	391,700
2.6 – Universal Residential Curbside Collection	Phase 2 (2025-30)	5,440	6,940	11,200	2,174,000
2.7 – Self-Haul Diversion Options	Phase 2 (2025-30)	1,280	1,800	130,900	142,900
Totals		**16,210**	**22,520**	**184,000**	**2,850,000**

Figure ES-1

The City of Helena has an estimated diversion rate of 26%. Building upon that baseline diversion, the successful implementation of the Phase 1 and Phase 2 waste reduction initiatives identified in this plan will help the City surpass its goal of 50% diversion.

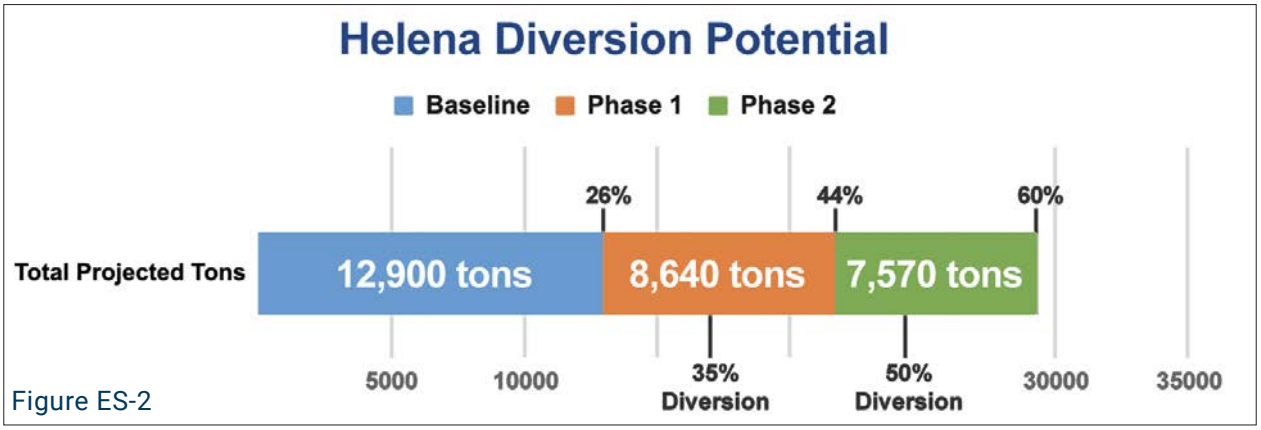


Figure ES-2

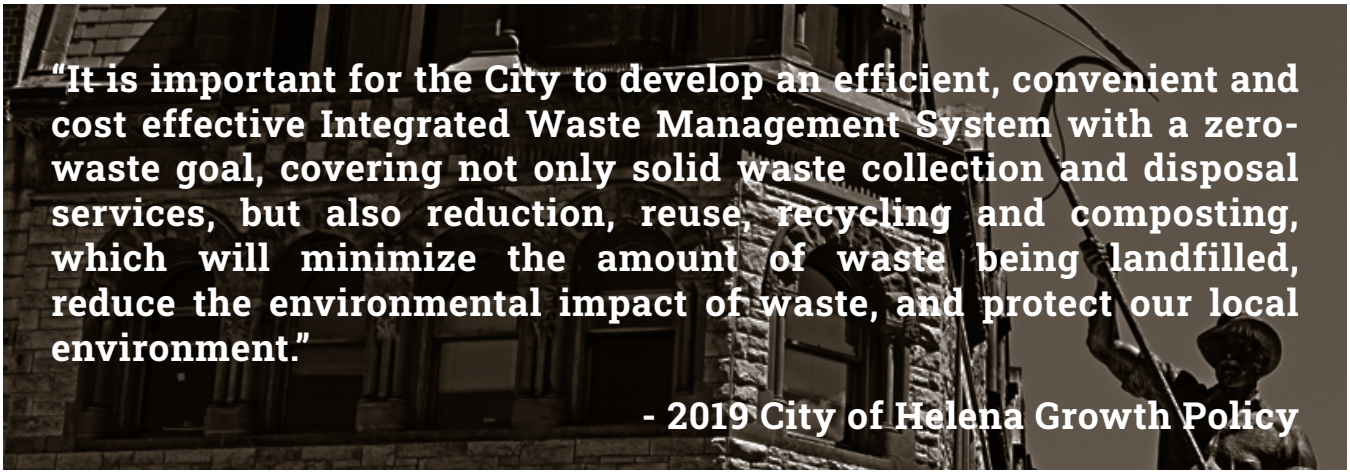
1 See *Appendix C - Impact Analyses Methodology* for details regarding the calculation of projected diversion and greenhouse gas reductions

Background

The City of Helena has been working to reduce waste since it introduced recycling drop-off centers in the mid-1980s. The formation of the Helena Climate Change Task Force in 2007 signaled an evolution in the community's thinking around the role of materials management in community sustainability. The Task Force was charged with proposing potential initiatives for conserving water and energy, reducing waste, and reducing greenhouse gas emissions. The resulting 2009 Action Plan contained a recommendation that the City adopt the U.S. Environmental Protection Agency goal of recycling 35% of discarded materials by 2020.[1] [2]

A key outcome of the Action Plan was the eventual formation of Helena's Citizen Conservation Board (CCB). Established by City resolution in 2017, the CCB was formed to encourage citizen oversight in order "to support, recommend, report on, and monitor sustainability measures undertaken by the City of Helena."[3]

The 2019 Helena Growth Policy adopted by the Helena City Commission in June 2020, stated that the City intends to "pro-actively develop an Integrated Waste Management System…which will reduce – through source reduction, reuse, recycling and composting – the amount of solid waste generated by households, businesses, and governmental entities located within the City and disposed of in the landfill."[4] The 2019 Growth Policy stated the importance of a "zero-waste" goal.[5] Through CCB leadership, the City adopted a waste reduction goal to reduce solid waste disposal to landfills by 50% by 2040, with an interim target of 35% reduction by 2030.[6]



1 https://www.helenamt.gov/fileadmin/user_upload/Commission/Citizen_Conservation_Board_Documents/Climate_Task_Force_Report_8-19-09.pdf
2 On November 17, 2020 at the America Recycles Summit, the EPA Administrator announced the National Recycling Goal to increase the U.S. recycling rate from the previous 35% by 2020 goal to 50% by 2030. – https://www.epa.gov/recyclingstrategy/us-national-recycling-goal
3 https://www.helenamt.gov/fileadmin/user_upload/Commission/Resolutions/2017/Res__20375_-_Citizen_Conservation_Board.pdf
4 City of Helena 2019 Growth Policy, chapter 5, page 9, found at https://www.helenamt.gov/government/departments/community-development/planning/long-range-planning
5 ibid.
6 https://www.helenamt.gov/fileadmin/user_upload/Commission/Resolutions/2021/Res_20643_-_CCB_Waste_Reduction.pdf

The City of Helena assembled a project team of City staff and Citizen Conservation Board members to work with Zero Waste Associates, a mission-driven consulting firm operating out of Missoula, on the development of this Strategic Plan.

Impacts of Waste

Waste reduction is one of the fastest, easiest, and least expensive ways a community can reduce its climate impact. According to the EPA, 42 percent of greenhouse gas emissions come from the provision of goods and food.[1] For this reason, the trash can is now seen as one of the three primary targets to address the climate crisis, along with smokestacks and tailpipes.

Developed by the Zero Waste International Alliance, the Zero Waste hierarchy of highest and best use prioritizes upstream strategies (rethink/redesign, reduce, reuse) over downstream strategies (recycle, compost).[2]

The materials that we manage downstream (recycle, compost, trash) represent a fraction of the impacts caused upstream from extraction of raw materials, manufacturing of products, and distribution of goods. This means that ***recycling*** or ***composting*** one ton of material in Helena reduces one ton from landfill disposal in Helena. However, ***reducing*** one ton of materials used in Helena reduces 71 tons from landfill disposal across the entire chain of production.[3]

Source reduction results in the greatest greenhouse gas emissions reductions and pollution prevention of any material management strategy. However, when the valuable resources that we do use are kept local and managed according to their highest and best use, greenhouse gas emissions are reduced and economic value is generated through reuse, recycling, and composting. Waste reduction strategies are thus characterized by both global and local considerations making them highly effective solutions to the challenges of sustainability.

With regards to Helena's distance from recycling markets, life cycle analysis studies conclude that the environmental benefit of recycling—making new products from recycled materials—is "an order of magnitude" greater than the impacts associated with collection, processing, and transportation to markets.[4]

1 Opportunities to Reduce Greenhouse Gas Emissions through Materials and Land Management Practices, September 2009 (epa.gov)
2 https://zwia.org/zwh/
3 https://ilsr.org/wp-content/uploads/2008/06/fullreport_stoptrashingtheclimate.pdf
4 https://zerowasteoz.org.au/wp-content/uploads/2017/12/J-Morris-LCA-recycling-vs-landfoill-and-inc.pdf

Current Policies, Programs, and Infrastructure

Communities that decide to make waste reduction a priority often adopt policies to guide them. Programs are necessary to support community members in understanding and participating in waste reduction activities. Infrastructure is required to provide the physical spaces needed to keep materials out of the discard stream and in the community. Together policy, programs, and infrastructure create the scaffolding upon which a community can build its waste reduction efforts. Below is an overview of the policies, programs, and infrastructure currently in place in Helena to support waste reduction.

Policies

The City of Helena waste reduction goal adopted by the City Commission in 2021 is a key policy directing Helena's current waste reduction efforts. It is supported by the 2019 Growth Policy and the 2009 Climate Change Task Force Action Plan.

Programs

The City of Helena Public Works Department operates the City of Helena Transfer Station and oversees many of the City's current waste reduction programs. It is the City's exclusive garbage hauler for Helena's 11,800 single family households and also provides garbage and cardboard collection services to more than 650 Helena businesses. The City provided a blue bag residential curbside recycling program that was discontinued in 2009.

The City's Recycling Coordinator and Transfer Station administrative staff provide technical assistance to residents and businesses via phone, email, and at events. The City recycles appliances through its residential bulky goods curbside collection program and Transfer Station drop-off. When necessary, the City's on-staff certified refrigeration technicians capture refrigerant from appliances for reuse prior to recycling. The Transfer Station has an ongoing partnership with Queen City Wheel House to promote bicycle reuse and also hosts an annual household hazardous waste collection event. Its participation in the annual Pines for Perch program helps turn Christmas trees into fish habitat in Canyon Ferry Lake. Some City departments utilize a regional Environmentally Preferable Procurement Cooperative for purchasing.

Private haulers offer subscription-based programs to residents and businesses. Helena Recycling has a contract with the City as the exclusive curbside recycling service providing source-separated collection of aluminum, tin, paper, cardboard, glass bottles and jars, and

#1 and #2 plastic to single family residences that choose to subscribe. Similarly, Better Roots Composting and 406 Composting both have contracts with the City to provide collection of yard debris and food scraps to single family residences that choose to subscribe. 406 Recycling provides electronics recycling services to residents, businesses, and institutions throughout Helena through collection and drop-off programs as well as collection events.

Infrastructure

Public Works manages the recycling facilities at the City of Helena Transfer Station and six community recycling drop-off sites. The Transfer Station recycling facilities accept aluminum, tin, paper, cardboard, glass bottles and jars, and #1 and #2 plastic containers as well as electronics, appliances, automotive batteries, antifreeze, motor oil, scrap metal, and yard debris. Materials accepted at the drop-off sites are aluminum, tin, paper, and cardboard. The City's current capacity to store recyclables at the Transfer Station is limited. The City transports materials to local recyclers such as Pacific Steel & Recycling and Helena Recycling, which both operate recycling drop-off centers as well. Capacity at local recyclers to accept the City's recyclable materials can sometimes be a barrier to moving materials, which can create a backlog at the Transfer Station. Yard debris collected at the Transfer Station is transported to the Lewis and Clark County Landfill where it is composted along with wastewater biosolids in open, turned windrows.

Many of the materials collected for recycling at the Transfer Station and drop-off sites are processed at the Pacific Steel & Recycling location in Helena. An estimated 80% of the total materials recycled in the City of Helena moves through Pacific Steel & Recycling making them a major player in Helena's current diversion activities.

Businesses such as Helena Sand and Gravel, which accepts clean concrete and asphalt, and Valley Sand and Gravel, which accepts clean fill dirt and topsoil, offer recycling and reuse options at no charge for drop-off at their facilities.

Recycling and "take-back" programs for small electronics, rechargeable batteries, and automotive materials are provided at a variety of retail businesses including Home Depot, Lowe's, O'Reilly Auto Parts, Autozone, Batteries Plus, and Target. Plastic bags and film can be dropped off for recycling at grocery stores such as Safeway, Albertsons, Walmart, Winco, Lowe's, and Target.

Non-profit and service organizations also provide community members with opportunities to reduce waste. Food redistribution organizations such as Helena Food Share and God's Love redirect surplus food to hungry Helenans while thrift stores such as Good Samaritan and Goodwill provide reuse opportunities for household goods and appliances, electronics, clothes, shoes, books, toys, and more. The mostly volunteer-run Habitat for Humanity ReStore is Helena's sole building materials reuse center.

Community Spotlight: Helena Food Share

Helena Food Share's mission is to create a hunger-free community. The main source of food given through Helena Food Share programs comes through the Grocery Rescue that they operate. Over one million pounds of food each year cannot be sold and is rescued by Helena Food Share through daily pick-ups at area grocery stores. This keeps the food from going to the landfill and makes it available to neighbors in need of food. Any food that is not appropriate for human consumption is donated to local farmers for animals.

photo of Joe Wodnik courtesy of Helena Food Share

Diversion, Disposal, and Generation

Helena Diversion and Disposal

The City of Helena's total landfill disposal in 2019 was 35,931 tons. This is a combined total of City of Helena Transfer Station disposal data (residential, commercial, roll-offs, self-haul) and Tri-County Disposal (commercial, construction and demolition) data. Based on those calculations and an approximate 2019 population of 32,024, Helenans on average discarded 6.15 pounds per person per day in local landfills. Recycling and composting activities in 2019 were estimated to be 12,918 tons, or 2.21 pounds per person per day. Together, disposal and diversion equated to 48,849 tons of generation, or 8.36 pounds per person per day.

In 2019, the City of Helena achieved an estimated 26% diversion rate. That rate was calculated using disposal and diversion data provided by the City of Helena and local materials management businesses Tri-County Disposal, Pacific Steel & Recycling, Helena Recycling, and 406 Recycling. Helena's actual diversion rate is likely higher because not all reuse, recycling, and composting activities are accounted for in this calculation. A more accurate estimate could be determined by accumulating additional private sector data.

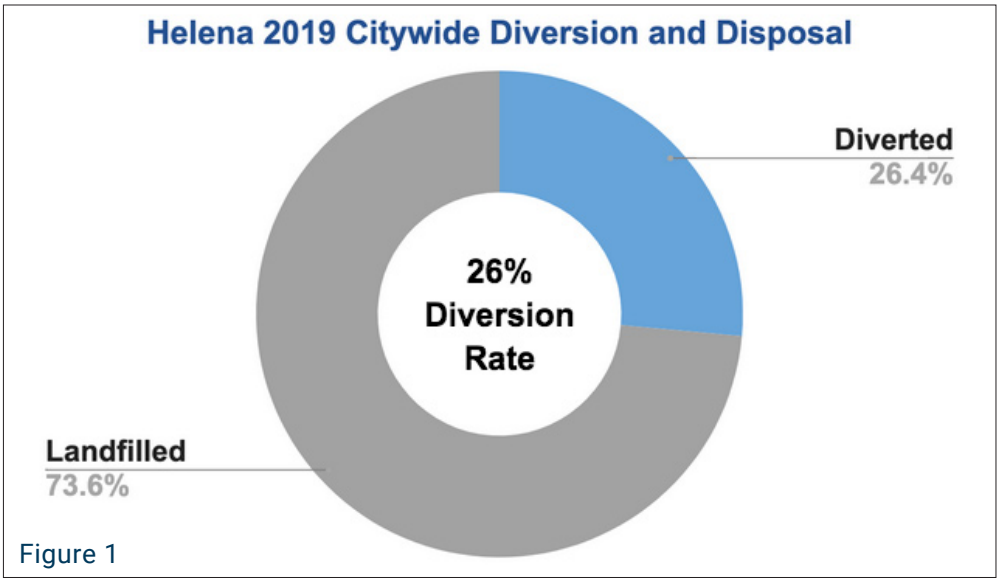


Figure 1

As a point of reference, the State of Montana Department of Environmental Quality (DEQ) estimates a current statewide diversion rate of 19%.[1] Recycling reporting is voluntary in Montana, therefore not all recycling businesses report each year. Like Helena, Montana's actual diversion rate is assumed to be higher than what is reported, however the DEQ does not have the data necessary to calculate a more accurate rate. The latest data published by the U.S. Environmental Protection Agency reports an average national diversion rate of 32%.[2]

Helena Total Disposal by Sector

The City of Helena's total landfill disposal in 2019 of 35,931 tons represents disposal from industrial/commercial/institutional (ICI), multifamily residential (MFR), single family residential (SFR), construction and demolition (C&D), and self-haul. The total represents City of Helena-specific disposal data from the City of Helena Transfer Station (materials directed to the Lewis & Clark County Landfill) and Tri-County Disposal (materials directed to the Valley View Landfill).

While materials discarded from ICI, MFR, SFR, and self-haul are assumed to be typical solid waste, the composition of the C&D stream is assumed to be more in line with what is typically seen in the C&D fraction of a community's discards (lumber, carpet, drywall, bulky goods, cardboard). Initiatives to reduce waste are found in Phases 1, 2, and 3. A policy to address C&D debris diversion is included as a Phase 3 initiative.

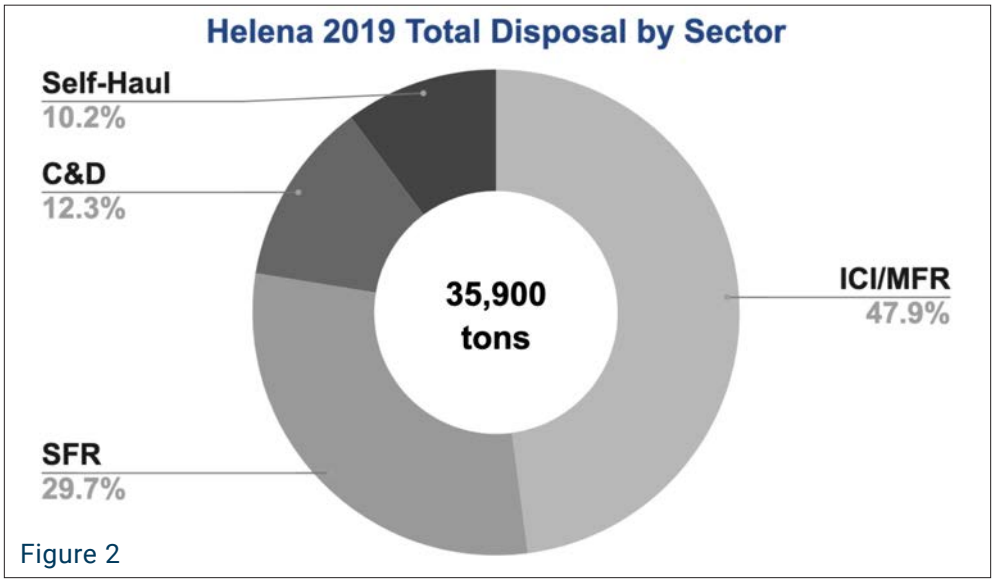


Figure 2

Chart Legend:
ICI/MFR - Institutional, Commercial, Industrial / Multifamily Residential
SFR - Single Family Residential
C&D - Construction & Demolition
Self-Haul - Residential Permit Holder Self-Haul to Transfer Station

1 https://deq.mt.gov/twr/Programs/recycling
2 https://www.epa.gov/facts-and-figures-about-materials-waste-and-recycling/national-overview-facts-and-figures-materials

Helena Diversion Potential

Analysis of landfill disposal composition data from the Cascadia Consulting Group Baseline Waste Composition Study for Missoula, Montana suggests that more than 80% of materials in Helena's landfill stream is potentially reusable, recyclable, or compostable.[1]

The reusable fraction includes electronics, clean wood, and bulky items and accounts for 11% of total disposal. At 36%, recyclables include paper, glass, metals, plastics (#1, #2, and plastic bags), tires, textiles, and ceramics. The compostable fraction representing 36% of total disposal includes food scraps, yard trimmings, and compostable paper. The remaining 17% represents materials that have no current market for reuse, recycling, or composting in Helena. That "No Market" fraction includes materials identified as "other" or "non-recoverable" in Cascadia's Missoula study.

The vast majority of landfilled materials already have diversion pathways established in Helena.

This analysis coupled with an understanding of Helena's current diversion programs suggests the vast majority of landfilled materials already have diversion pathways established in Helena. Diversion of those materials would require expansion of existing programs and infrastructure as well as the establishment of new policies, programs, and infrastructure to increase participation in diversion programs and to accommodate for the increase in diversion activities. This understanding guided the development of the waste reduction initiatives in this plan.

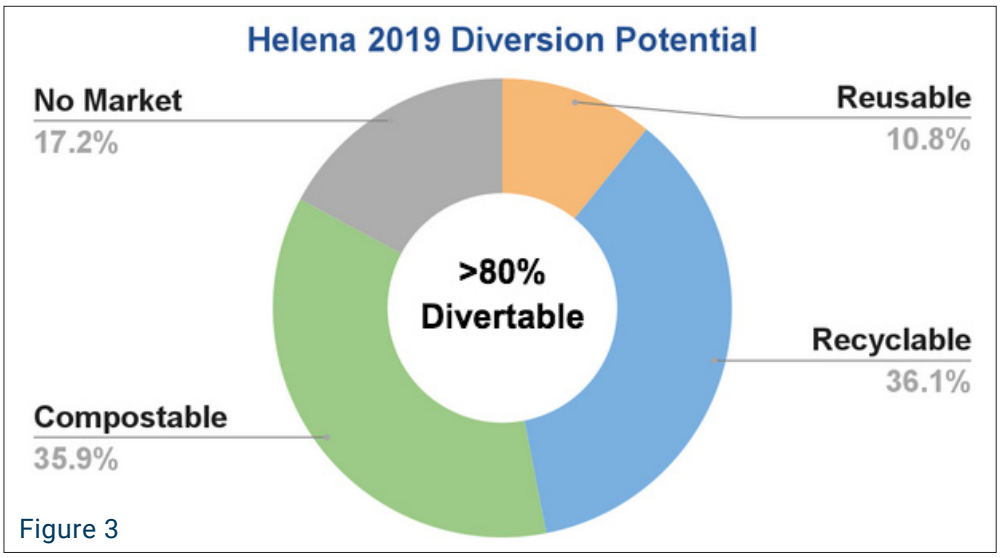


Figure 3

1 In developing the study for Missoula, Casadia relied on comparable data from similar communities across the region. This regional analysis provides a good approximation of landfill disposal composition for Helena – https://www.ci.missoula.mt.us/DocumentCenter/View/55981/Missoula-Baseline-Waste-Composition-Report-2021-PDF

Helena Estimated Value of Discards

Helena's discarded materials have value. Although price volatility is a hallmark of recycling markets, based on current local market prices for materials that the City of Helena currently recycles, a low estimate for the monetary value of a portion of the materials that are currently disposed of in Helena-area landfills is approximately $445,300 per year.

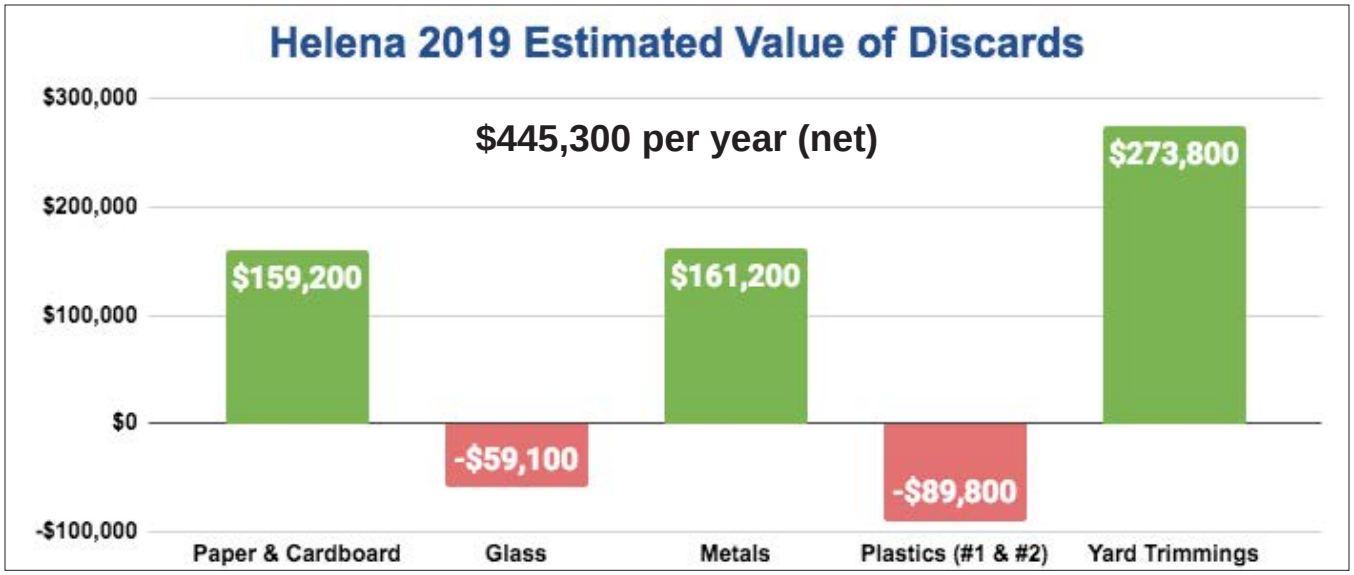


Figure 4

The table below compares the current local market prices for the discards discussed above to regional and national market price averages for those materials.[1] Other materials with established diversion pathways in Helena are also included in the table.

Material Type	City of Helena (current)		Regional (2021-22) & National	
	$/ton	*Source*	*$/ton*	*Source*
Cardboard	35	City of Helena	130	RecyclingMarkets.net
Mixed Paper	25	City of Helena	70	RecyclingMarkets.net
Tin	80	City of Helena	170	RecyclingMarkets.net
Aluminum	800	City of Helena	1,300	RecyclingMarkets.net
Scrap Iron (processed)	95	City of Helena	NA	NA
Scrap Iron (unprocessed)	75	City of Helena	NA	NA
Glass Bottles & Jars	-40	City of Helena	20	Momentum Recycling
Plastic (#1, #2)	-125	City of Helena	960	RecyclingMarkets.net
Yard Trimmings	60	City of Helena	100	Gardenwerks/Chadwick Nursery
Food Scraps & Paper	NA	NA	100	Gardenwerks/Chadwick Nursery
Reusables	NA	NA	400	Richard Anthony Associates (national)
Mixed Used Clothing	NA	NA	340	Global Recycling Network (national)

Figure 5

1 Montana is in Recycling Market Region 1 (Midwest/Central), which includes 13 states and three Canadian provinces – https://recyclingmarkets.net/secondarymaterials/

BROADWAY

Community Outreach

Community outreach and engagement was a high priority for the development of this plan. At the outset of the planning process, the City issued a media alert to inform the community about the opportunity to help identify community-led solutions for reducing waste and increasing reuse, recycling, and composting within Helena. Subsequent media alerts coincided with two virtual community planning events that took place in February and March 2022. Community input was instrumental in the selection of the Strategic Plan's waste reduction strategies with more than 100 Helenans participating in those events.

The City launched a dedicated page on the Be Heard Helena website to provide an online opportunity for Helenans to engage with the planning process. At the close of the online engagement period, 225 Helenans had responded to the Be Heard Helena survey and 21 ideas had been posted on the Idea Board.[1]

Between December 2021 and April 2022, the consultants interviewed 22 stakeholders representing local and regional reuse, recycling, and composting infrastructure, private collection service providers, large employers, public agencies, non-profit organizations, and educational institutions. Conversations with these representatives provided valuable insights into the opportunities and challenges of waste reduction in Helena from a variety of perspectives.

Five presentations followed by Q&A sessions about the project occurred with community groups and public agency bodies including the Helena Citizen Conservation Board, Hometown Helena, Downtown Helena Inc. General Membership, Helena Business Improvement District trustees, and the City/County Consolidated Parks Board. Groups received customized presentations to highlight relevant waste reduction opportunities.

A detailed summary of the planning process is included in *Appendix F – Community Outreach & Engagement Summary*.

1 https://beheardhelena.com/strategic-plan-waste-reduction

Community Events

Two 1.5-hour virtual community events took place in February and March 2022. At the *Project Kick-off Meeting* on February 17, 77 attendees received a briefing on the planning process and the results of a Helena waste assessment. The findings of that assessment are discussed earlier in this plan (See page 1•6 – *Diversion, Disposal, and Generation*). The briefing was followed by facilitated group discussions to identify ideas for potential waste reduction initiatives. The input received was integrated with a list of initiatives generated by the Helena project team. The result was a list of 10 proposed initiatives for waste reduction.

At the *Proposed Strategies Meeting* on March 16, 31 attendees received detailed explanations of the 10 proposed initiatives followed by facilitated group discussions to further refine the initiatives and provide an opportunity for additional ideas. The attendees of the March meeting unanimously endorsed inclusion of the 10 proposed initiatives in this Strategic Plan.

City-County Integrated Solid Waste Master Plan

This Strategic Plan for Waste Reduction precedes the development of a City-County Integrated Solid Waste Master Plan being developed by the City of Helena in partnership with Lewis and Clark County and key stakeholders. The plan aims to evaluate current City, County, and private waste management operations for their efficiency and effectiveness, identify alternatives to current practices, and discuss options for funding sources. The synergistic timing of these two plans means that the waste reduction strategies in this Strategic Plan can inform the analysis of the solid waste system changes needed to support the City of Helena's waste reduction goal.

Initiatives Overview

Included in this plan are 10 waste reduction initiatives selected from a list of proposed waste reduction strategies generated during the public participation process. The 10 stakeholder-endorsed initiatives represent those that the City of Helena has full authority to implement. *Appendix D – Community Partner Initiatives* includes additional initiatives that the City could explore with community partners or that other entities could implement independently of City involvement.

Of the 10 waste reduction initiatives, seven are identified for implementation in the short-term (Phase 1 – 2022-2024) and medium-term (Phase 2 – 2025-2030). Three additional waste reduction policies are identified for consideration in the long-term (Phase 3 – 2031-2040). All input into the development of this Strategic Plan pointed to beginning with education and incentives in Phase 1 followed by the implementation of new services and infrastructure in Phase 2. The new policies of Phase 3 would be adopted only as a last resort. In light of that, the consideration of the decision to implement Phase 3 policies would be based on evaluation of progress toward the waste reduction goal at the conclusion of Phase 2.

For each Phase 1 and Phase 2 initiative, the following impacts are identified and estimated:

- Potential landfill diversion tons – annual
- Greenhouse gas (GHG) emissions reduction potential in metric tons of carbon dioxide equivalent (MT CO2e) – annual
- Costs – one-time
- Costs – annual

Detailed descriptions of each initiative are included in *Appendix B – Waste Reduction Strategy Summaries*. The assumptions and calculations for the diversion and greenhouse gas emissions reductions are included in *Appendix C – Impact Analyses Methodology*.

Phase 1 – Education & Incentives

(Implementation Timeframe: 2022-2024)

1.1 – Community Education

Community Education is one of the most important and comprehensive waste reduction initiatives and should work in tandem with and support all other waste reduction initiatives. The components of Community Education include:

- **Targeted, Program-specific Education Programs** – to promote strategies for waste reduction, reuse, recycling, and composting to all sectors of Helena based on the program initiated.
- **Informational Website** – to provide an online portal to waste reduction information for all sectors.
- **Ready-to-Use Educational Materials** – prepare materials and resources and make them accessible to anyone in the community for online communication through social media posts and for use at in-person events.
- **Campaign-specific Educational Materials** – to support specific waste reduction education initiatives such as a #skipthestuff campaign, food waste reduction campaign, reuse promotion campaign, or demolition alternatives campaign.
- **Technical Assistance for Residents** – provide single-family and multi-family residents with assistance during implementation of new initiatives.
- **Technical Assistance for Businesses** – provide businesses with assistance when beginning or expanding diversion programs.

Community Education will be initiated in the beginning of this next era of Helena's waste reduction journey and be continuous. The program will be ongoing and have consistent, simple messaging that is updated regularly as Helena initiates more programs related to its waste reduction goals.

1.1 – Community Education	Phase 1 (2022-24)
Diversion Potential (Tons)	4,030
GHG Emissions Reduction Potential (MTCO2e)	5,650
One-time Costs ($)	8,500
Annual Costs ($)	115,600

1.2 – Community Incentives

The City will create Community Incentives programs that target waste reduction and diversion goals for residents, businesses, organizations, and institutions, such as:

- **Recycling Incentive Program** – the City of Helena can partner with an established incentive program like RecycleBank, FundingFactory, EnviroPerks, or other similar organizations or can create its own system.
- **Pay-As-You-Throw Program for Single-Family Residents** – implement a cart-based system through which the customer is charged by cart size. There are often 3 or 4 cart sizes, and the monthly fee increases with the cart size. This incentivizes single-family residents to reduce, reuse, recycle, and compost.
- **Business Recognition Program** – create a business recognition program for the City of Helena. Criteria will be set and can include a waste audit, data collection, commitments to waste reduction initiatives, and a window sticker for recognition. This incentive program motivates business owners to reduce their waste by getting recognition for their effort.

Community Incentives programs will be initiated right away and be clearly communicated on an ongoing basis.

1.2 – Community Incentives	Phase 1 (2022-24)
Diversion Potential (Tons)	3,090
GHG Emissions Reduction Potential (MTCO2e)	3,880
One-time Costs ($)	8,500
Annual Costs ($)	7,000

1.3 – Community Reuse Support

The goal of Community Reuse Support is to grow and connect the local reuse industry with the community by providing the best available information and system to keep durable and reusable items out of the landfill. Possible components of Community Reuse Support are:

- **Reuse and Repair Directory** – create a directory that lists local repair and reuse (nonprofits & small local stores) in Helena. This will include thrift stores, creative reuse stores, antique stores, and repair stores.
- **City-wide Garage Sales** – organized by neighborhood or community wide possibly through the Helena Citizens Council, sales could be once a year, such as in conjunction with graduation at Carroll College, or quarterly based on interest.
- **Reuse Campaign** – develop a campaign that would complement the Reuse and Repair

Directory but go beyond that to identify barriers and benefits to shopping used. The data the city will collect regarding barriers can be used to enhance the local reuse economy. This campaign can also include specific information on what the local thrift stores accept and do not accept along with reasons to shop local and shop used.

Community Reuse Support is an ongoing program that overlaps with Community Education.

1.3 – Community Reuse Support	Phase 1 (2022-24)
Diversion Potential (Tons)	560
GHG Emissions Reduction Potential (MTCO2e)	1,460
One-time Costs ($)	8,500
Annual Costs ($)	7,000

1.4 – Lead by Example

Lead by Example is a forward-facing effort by the City to implement waste reduction strategies in its buildings and in City-owned public spaces. These initiatives are shared with the community to garner support and to help create the culture change that is needed to reach the goals. Lead by Example components include:

- **Waste Prevention, Recycling, and Composting in All Municipal Buildings, Public Spaces, and Public Events** – create access to systems and programs that make waste reduction behaviors possible by all who engage with the City on City property.
- **Sustainable Procurement for Municipal Purchases** – institutionalize and operationalize procurement protocols across all City departments that support the City's waste reduction goals and the waste reduction hierarchy.

Lead by Example is a program to begin right away. The program is ongoing and will be continually updated and communicated to the community.

1.4 – Lead by Example	Phase 1 (2022-24)
Diversion Potential (Tons)	960
GHG Emissions Reduction Potential (MTCO2e)	1,470
One-time Costs ($)	5,200
Annual Costs ($)	12,000

Community Spotlight: Carroll College Free Market

In May 2022, faculty, staff, and students from the Carroll College Environmental Science Program, Hunthausen Center for Peace and Justice, and the Anthrozoology Program collaborated with Campus Facilities and Housing offices to host the first annual Free Market "Swap Meet" to divert furniture, clothing, and household goods away from the landfill and back to the community.

The week-long event was held in the spacious and covered Canine Training Center where furniture, clothes, kitchen items, and household goods were brought in by students and rehomed by other students as well as local non-profit organizations Good Samaritan, YWCA, and the Friendship Center.

Organizers estimate that the Free Market diverted at least 10,000 pounds of usable goods from the landfill and hope to expand the Free Market to the greater Helena community by inviting more agencies and perhaps host a "shopping spree afternoon" for the general public.

photo courtesy of Patricia Heiser

2.5 – Recycling and Composting Infrastructure

The City of Helena must arrange for sufficient organics and recycling processing capacity to accomodate the increase in compostable and recyclable materials that will be diverted as the City moves toward its waste reduction goal. While the following proposed actions would be planned and developed in Phase 1, implementation of necessary facilities would occur in Phase 2.

- **Develop or Contract for Development of a Materials Recovery Facility** – plan for a facility that can meet Helena's recycling needs for up to the next 20 years.
- **Develop or Contract for Development of a State-of-the-Art Composting Operation** – plan for a facility that can meet Helena's composting needs for up to the next 20 years (possibly at the county landfill in partnership with Lewis & Clark County).

A key consideration in evaluating the type of organics processing capacity to be developed will be the type of organic materials, or feedstock, that can be processed at the facility or facilities. Facility feedstock requirements will directly impact how organic materials are collected in the community. The biggest question is whether to collect yard debris and food scraps in the same container, as food scraps need to be collected year-round on a weekly basis, and yard debris is only ollected seasonally. The answer to that question will depend on the facility requirements and be a factor in how to implement the organics diversion aspect of the Universal Residential Curbside Collection program.

2.5 – Recycling and Composting Infrastructure	Phase 2 (2025-30)
Diversion Potential (Tons)	850
GHG Emissions Reduction Potential (MTCO2e)	1,330
One-time Costs ($)	11,200
Annual Costs ($)	391,700

2.6 – Universal Residential Curbside Collection

The key component of Universal Residential Curbside Collection is to provide and bill all residents for regularly-scheduled collection for: Recycle, Compost, and Garbage. An additional program component of once-a-month, quarterly, or on-demand curbside pick up of bulky items paired with a system to handle and process those products/materials would increase opportunities to reuse or recycle additional materials.

Details of each curbside collection stream include:

- **Recycle** – these are materials that are currently accepted in the Helena Recycling

curbside recycling collection program; additional materials could be added as markets allow.

- **Compost** – these are compostable organic materials that would be collected in a manner suitable to accommodate the available processing facility or facilities.
- **Garbage** – these are materials without diversion potential that would go to landfill.
- **Bulky Reuse/Recycle** – these are materials that may have embodied value that can be retained if managed properly for reuse or materials that are recyclable but are too large for inclusion in the regular collection system.

Universal Residential Curbside Collection is an ongoing program.

2.6 – Universal Residential Curbside Collection	Phase 2 (2025-30)
Diversion Potential (Tons)	5,440
GHG Emissions Reduction Potential (MTCO2e)	6,940
One-time Costs ($)	11,200
Annual Costs ($)	2,174,0001[1]

2.7 – Self-Haul Diversion Options

Generators from multifamily, commercial, self-haul, and construction and demolition projects are responsible for 70% of landfill disposal. Facilities currently serving these sectors include the City of Helena Transfer Station and the shared City/County drop-off sites. To provide sufficient waste reduction options for these generators, the City will implement the following infrastructure enhancements.

- **Transfer Station**
  - » Expand accepted materials to include more types of plastics and other materials as regional markets allow.
  - » Incentivize yard debris diversion and recycling (e.g., by including recycling with the current Solid Waste Assessment).
  - » Expand upon the Queen City Wheel House bicycle reuse program to partner with other reuse organizations for other types of usable products.
  - » Revisit "Drop and Swap" program and research best practices.
  - » Provide surplus reusable materials to the community, (such as wood, supplies, and fixtures) collaborating with existing nonprofits (e.g. Habitat for Humanity ReStore).

1 The annual cost of Universal Residential Curbside Collection assumes a public-run program with weekly trash, weekly organics (8 months/yr), and every-other-week single-stream recycling. It also includes collection container costs amortized over 8 years. For alternative recycling approaches and estimated costs see the Residential Recycling Collection System Report produced for the City of Helena by Zero Waste Associates.

Phase 2 – New Services & Infrastructure

(Implementation Timeframe: 2025-2030)

  - » Explore with the Chamber of Commerce, small businesses, and nonprofit organizations if there are ways to make it easier for them to reuse, recycle, or compost at the Transfer Station.
- **Drop-off Sites**
  - » Add additional recycling drop-off stations for residents and businesses.
  - » Expand the list of acceptable materials as regional markets allow.

Initial improvements and expansion of enhanced Self-Haul Diversion Options would require significant effort to plan and develop during Phase 1. After implementation in Phase 2 they would remain an ongoing program.

2.7 – Self-Haul Diversion Options	Phase 2 (2025-30)
Diversion Potential (Tons)	1,280
GHG Emissions Reduction Potential (MTCO2e)	1,800
One-time Costs ($)	130,900
Annual Costs ($)	142,900

Phase 3 – New Policies as Needed

(Implementation Timeframe: 2031-2040)

The City will conduct an evaluation after the implementation of Phase 2 in 2030 to assess progress toward the waste reduction goal and to determine if the 35% by 2030 goal has been achieved. If it is determined that the City of Helena has not surpassed the interim goal and is not trending toward the 50% by 2040 goal, new policies could be evaluated for future implementation, such as the following:

3.8 – Hauler Equal Volume Diversion Ordinance

All haulers providing garbage collection services to residents (single family & multi-family), businesses, or institutions in the City of Helena must also provide recycling and composting services in equal or greater quantities to the garbage services. For example, if a resident receives 96 gallons of landfill service each week, or every other week, that resident will also receive at least 96 gallons of recycling and composting service each week, or every other week. The desired outcome is that for every gallon diverted to recycling or composting, an equal amount less is sent to the landfill.

City Reuse Partner Spotlight: Queen City Wheel House

Queen City Wheel House in Helena is a local non-profit bike shop. They accept donated bicycles and parts, which they refurbish and distribute back into the community. Their mission is to ensure that everyone can experience the joy and freedom of owning their own bicycle, regardless of income. In support of that mission, the City of Helena and Queen City Wheel House have partnered to salvage bicycles at the City Transfer Station. Jeff Kuhn, Executive Director of Queen City Wheel House, says the partnership "works really well." Based on his experience, Jeff thinks it would be "totally doable" to salvage other consumer goods for reuse at the Transfer Station with similar non-profit organization partnerships.

photo of Jeff Kuhn courtesy of Queen City Wheel House

3.9 – Community Recycling Ordinance

The policies and programs implemented in Phase 2 (*2.6 – Universal Residential Curbside Collection*, *2.7 – Self-Haul Diversion Options*) and the Phase 3 policy, *3.8 – Hauler Equal Volume Diversion Ordinance*, will provide the physical infrastructure for universal recycling and composting in Helena for all generators (single family, multifamily, commercial, and institutional). The Community Recycling Ordinance would provide clear direction to all generators about what is expected as "new rules" for waste reduction in Helena. This policy would require source separation, where no trash is placed in the recycling or compost containers and no recycling or compost is placed in the trash containers. This ordinance would be phased in over time, beginning with the larger commercial and institutional generators and ultimately including all generators within the City.

3.10 – Construction, Deconstruction, & Demolition Ordinance

All construction and development projects divert 50% of all discarded materials. The Construction, Deconstruction, & Demolition Ordinance would include requirements, programs, and incentives to capture, reuse, and recycle materials generated through construction projects in Helena. The City would consider adopting one or more of the following policies after obtaining input from local developers and construction stakeholders and service providers:

- **Minimum requirements** for construction and demolition debris diversion (e.g., 50 percent), offering contractors the option to source-separate the materials for reuse, recycling, and composting on-site or to send mixed loads to a certified construction and demolition sorting facility;
- **Require a waste management plan or sustainable deconstruction plan** be submitted with permit applications for construction and demolition projects - do not issue permits to projects without plans;
- **Charge a deposit for permitted projects**, refundable upon permittee demonstrating that the minimum threshold of construction and demolition debris diversion has been met through reuse, recycling, or composting;
- **Give preferential treatment** and/or permit credits for projects that earn LEED or Green Globe certification;
- **A deconstruction ordinance** that requires deconstruction rather than demolition of buildings that meet certain criteria.

Phase 1 and Phase 2 Initiatives Impacts

The table below shows the planned implementation schedule, projected diversion, projected greenhouse gas reduction, and the resources that will be needed to implement the Phase 1 and Phase 2 waste reduction initiatives.

Waste Reduction Initiatives	Phase	Projected Diversion (tons)	Projected GHG Reduction ($MTCO_2e$)	One-Time Costs ($)	Annual Costs ($)
1.1 – Community Education	Phase 1 (2022-24)	4,030	5,650	8,500	115,600
1.2 – Community Incentives	Phase 1 (2022-24)	3,090	3,880	8,500	7,000
1.3 – Community Reuse Support	Phase 1 (2022-24)	560	1,460	8,500	7,000
1.4 – Lead by Example	Phase 1 (2022-24)	960	1,470	5,200	12,000
2.5 – Recycling and Composting Infrastructure	Phase 2 (2025-30)	850	1,330	11,200	391,700
2.6 – Universal Residential Curbside Collection	Phase 2 (2025-30)	5,440	6,940	11,200	2,174,000
2.7 – Self-Haul Diversion Options	Phase 2 (2025-30)	1,280	1,800	130,900	142,900
Totals		**16,210**	**22,520**	**184,000**	**2,850,000**

Figure 6

Diversion Potential and Greenhouse Gas Emissions Reduction Potential

Implementing the Phase 1 and Phase 2 waste reduction initiatives identified in this plan will help the City achieve its 50% goal. Using conservative estimates for capture rates by material type, the Phase 1 and Phase 2 initiatives would result in an additional 16,200 tons per year diverted from landfill. The City could increase its diversion rate from 26% to an estimated 60% with these seven initiatives fully implemented.

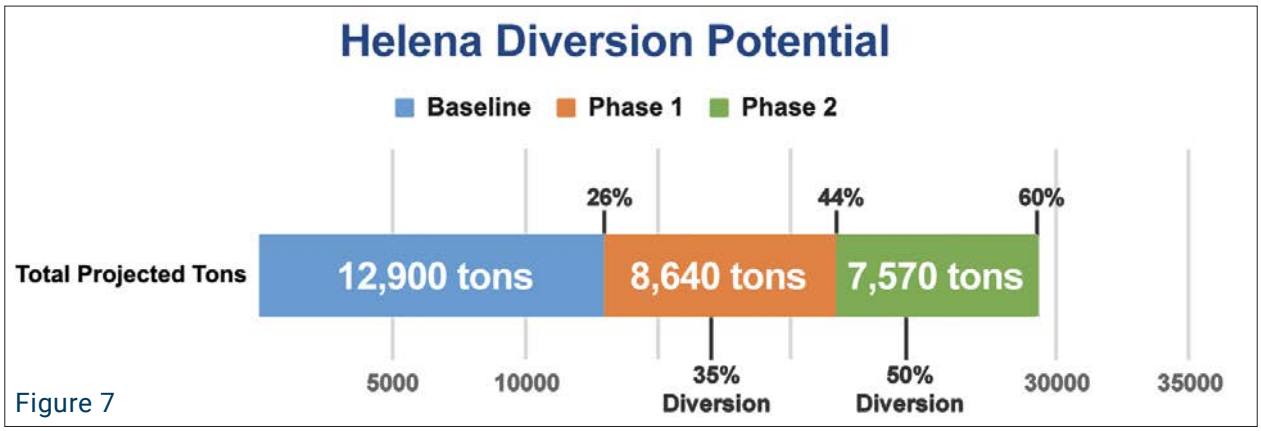
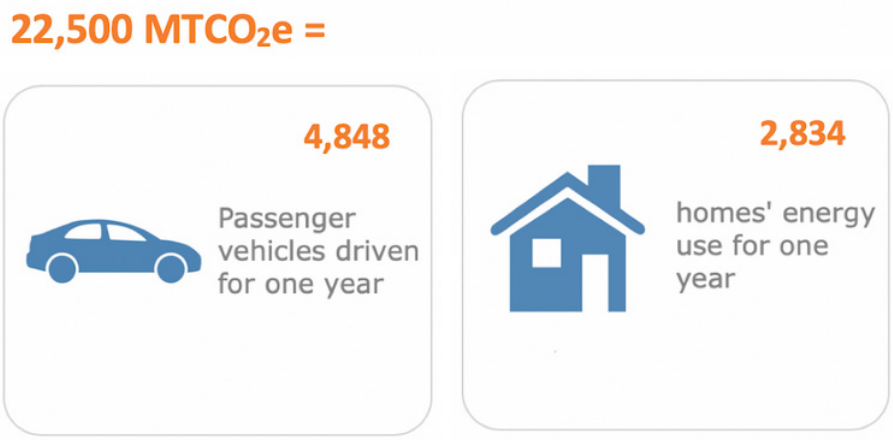


Figure 7

As noted in the introduction, waste prevention, source reduction, recycling, and composting activities reduce greenhouse gas emissions. Using the U.S. Environmental Protection Agency Waste Reduction Model (WaRM), the Phase 1 and Phase 2 waste reduction initiatives are estimated to reduce greenhouse gas emissions by approximately 22,500 metric tons of carbon dioxide equivalent.[1]



The methodology, calculations, and projections are included in *Appendix C – Impact Analyses Methodology*.[2]

Costs

One-time costs for planning and development of the Phase 1 and Phase 2 initiatives is estimated to be $184,000. Total annual program cost at full implementation of Phase 1 and Phase 2 is estimated to be $2,850,000. Of that amount, $2,174,000 is the estimated cost of implementing *2.6 – Universal Residential Curbside Collection*. The remaining $676,000 is the estimated cost of implementing the other Phase 1 and Phase 2 initiatives.

Implementing *2.6 – Universal Residential Curbside Collection* would provide equal access to curbside recycling and composting for all single family residents in the City of Helena. A portion of the annual solid waste assessment paid by single family residents ($176.10 per property) covers the cost of weekly trash collection services. The cost evaluation completed for initiative *2.6 – Universal Residential Curbside Collection* assumes the City of Helena would provide every-other-week automated single-stream recycling collection and weekly organics collection April through November in addition to weekly trash collection services. If the cost of the additional services were to be borne by the annual solid waste assessment, payment would increase to $382. The change in fee represents a 117% increase in cost and a nearly tripling of service for Helena residents with trash collection and no other curbside services. However, these costs represent substantial savings to those residents who are currently subscribing to recycling and compost collection services (See *Figure 8*). They are also cost-competitive compared with programs in other Montana communities (See *Figure 9*).

1 U.S. EPA Waste Reduction Model (WARM) – version 15
2 image courtesy of U.S. EPA Greenhouse Gas Equivalencies Calculator – https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator

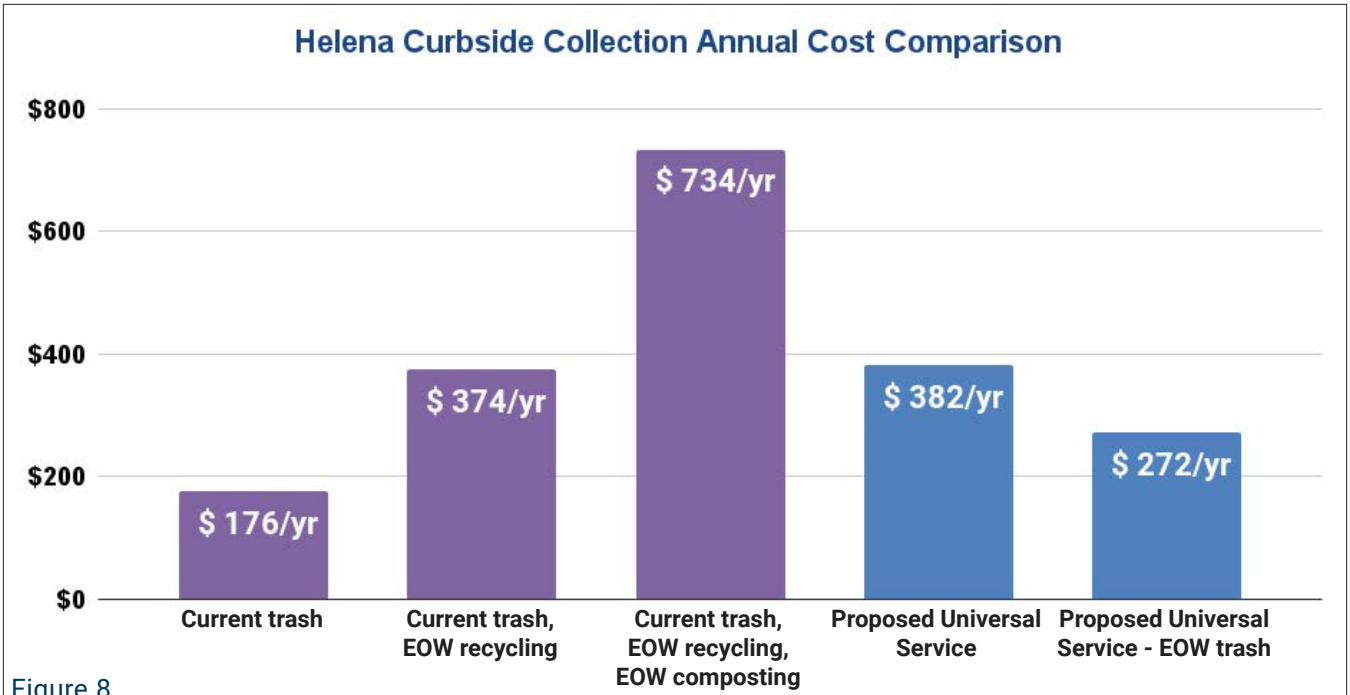


Figure 8

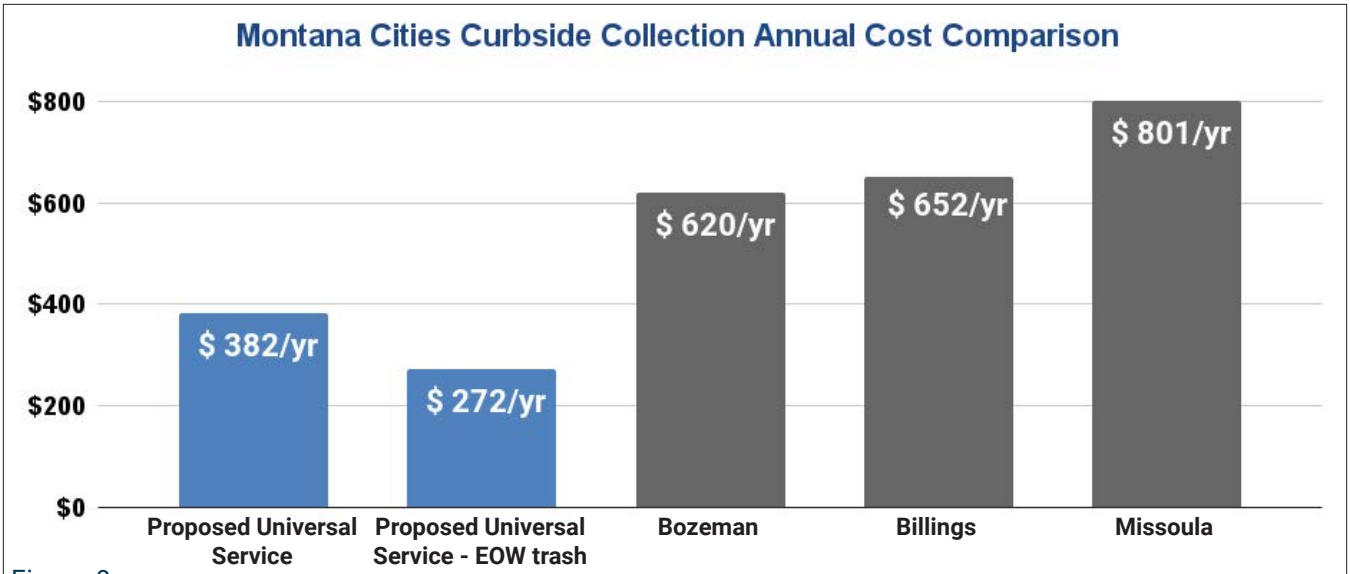


Figure 9

As noted earlier, all input into the development of this plan pointed to beginning with education and incentives in Phase 1 followed by the implementation of new services and infrastructure in Phase 2. As such, the annual costs of $115,600 for initiative *1.1 – Community Education* can be transferable to support community education about and promotion of any of the seven Phase 1 and Phase 2 initiatives. Line items for program-specific outreach are included in the annual budgets for initiatives *2.6 – Universal Residential Curbside Collection* and *2.7 – Self-Haul Diversion Options*, both of which will require additional outreach during implementation.

Cost Savings and Revenue Potential

Implementing the Phase 1 and Phase 2 waste reduction initiatives has the potential to save costs. Listed below are the estimated avoided landfill costs at full implementation of each initiative. Since landfill disposal of materials tipped at the Transfer Station is a City expense, the avoided costs are based upon tons of landfill-bound discards flowing through the Transfer Station that would be avoided as a result of the Phase 1 and Phase 2 waste reduction initiatives.

Estimated Avoided Landfill Costs	Total Avoided (tons)	Transfer Station Avoided (tons)	Annual Avoided Costs ($)
1.1 – Community Education	4,030	2,420	(62,870)
1.2 – Community Incentives	3,090	1,850	(48,200)
1.3 – Community Reuse Support	560	340	(8,740)
1.4 – Lead by Example	960	960	(24,960)
2.5 – Recycling and Composting Infrastructure	850	510	(13,260)
2.6 – Universal Residential Curbside Collection	5,440	5,440	(141,440)
2.7 – Self-Haul Diversion Options	1,280	1,280	(33,280)
Total Annual Avoided Landfill Costs ($26/ton)	**16,210**	**12,800**	**(332,750)**

Figure 10

Every Other Week Collection of Trash

Significant cost savings could be accomplished if the City chose to adopt every-other-week collection of trash concurrently with the roll-out of every-other-week automated collection of single-stream recyclables. This approach to collection makes the addition of a new program effectively cost-neutral from the standpoint of collection.

As noted in the initiative summary for *2.6 – Universal Residential Curbside Collection*, the City of Renton, Washington pioneered an innovative contract with its private hauler that cost-effectively transitioned the community from weekly collection of recycling and garbage to every-other-week collection of recycling and garbage and weekly collection of compostable materials (see *Appendix B•19* for more details).

Revenue Potential

In 2021, the City of Helena brought in approximately $80,346 in gross revenue from the sale of recyclable commodities collected at the Transfer Station and at the drop-off sites. However, in recognition of the fluctuating nature of recycling markets, potential revenue was not included in the projected cost evaluations for the initiatives. The net costs for implementation of these waste reduction initiatives may be offset to some degree by recycling revenues, but the cost evaluations in this plan ensure adequate funding to accomplish the tasks regardless of market volatility.

Key Program Component Evaluations

This section discusses issues of particular interest to the City of Helena in the context of its waste reduction goals: education and outreach, residential curbside recycling, legislative diversion actions, and available federal funding.

Education and outreach will play a significant role in rallying the level of community involvement that the goals require. This section provides a detailed overview of the actions recommended in initiative *1.1 – Community Education* as well as real-world examples from other communities.

Universal residential curbside recycling, where every single family residential household receives recycling collection, is common in high diversion communities. This section includes a summary of a report conducted for the City of Helena during the development of this plan that evaluates different approaches to implementing universal residential curbside recycling.

Legislative approaches to increase diversion at the federal, state, and local levels are also discussed as are emering funding opportunities in support of waste reduction at the federal level.

Education and Outreach

The goal of education and outreach is for the community to understand what waste reduction programs exist and how to use them effectively. That requires information and engagement targeted to each specific program. For example, when a program is created, such as rescuing edible food to feed those in need, community-wide program education must be accompanied by sector-specific engagement with those most impacted by the program.

Education and outreach is successful when the community is engaged in a given waste reduction initiative and when there is a reduction in the targeted material sent to the landfill as a result. Generally, the waste reduction initiatives work in tandem; therefore, education and outreach is part of and enhances each initiative. When they are implemented together they will produce the desired result of waste reduction.

Education and outreach on waste reduction can take many forms and be delivered in a variety of ways. It can include a dedicated website with specific information on programs, educational materials like signage, resources like best practices guides, and hands-on technical assistance. Delivery methods can be online, in print, or in person. Education and

outreach should be ongoing, simple, consistent, and help the community work together to achieve waste reduction goals. The education and outreach actions detailed below are included in initiative *1.1 – Community Education*.

Targeted, Program-specific Education

Description: Targeted education programs are program-specific strategies for waste reduction, reuse, recycling, and composting. These educational programs will be delivered to all sectors of Helena based on the needs of each initiative. An example would be the educational program required to support the roll-out of initiative *2.6. – Universal Residential Curbside Collection*. The information prepared for this targeted educational program would include how to recycle, what goes into the bins, what day to place it at the curb, and why it is crucial to participate in the program.

image courtesy of Eco-Cycle

Example: EcoCycle in Boulder County, Colorado has a Recycle, Compost, and Reuse online resource for community members.

More information: https://www.ecocycle.org/recycle-compost-reuse

Informational Website

Description: An informational website is an online portal of waste reduction information for all sectors of Helena that includes basic waste reduction information. This online resource will become the central location for all waste reduction information for Helenans. There can be videos, fact sheets, and sector-based information housed on this website.

Example: The City of Missoula, Montana has a website devoted to their Zero Waste effort with an abundance of information on how the community can participate in the Zero Waste programs. The Flathead Valley created the WasteNot project to help the community learn how to reduce and recycle locally

More information: https://www.zerobyfiftymissoula.com/, https://www.wastenotproject.org/

Ready-to-Use Educational Materials

Description: Ready-to-use education materials are resources for online social media, print media communications, and in-person community events. These resources can be communicated at outreach events, festivals, and art shows.

image courtesy of Pitkin County Solid Waste Center

Example: The website of the Pitkin County Solid Waste Center in Pitkin County, Colorado includes a Community Outreach section, which contains engaging and educational graphics and videos that can be viewed and shared easily to communicate their various waste reduction messages.

More information: https://www.landfillrules.com/community-education

Campaign-specific Educational Materials

Description: Campaign-specific educational material are campaigns that target a reduction of a specific type of disposal material stream and provide a platform for education and action.

Example: Upstream Solutions created a campaign called #skipthestuff. This campaign targets reducing accessories (single-use plastic straws, stirrers, lids, utensils, napkins, single-use condiment packets, and other accessories) distributed for takeout food and to-go food.

More information: https://upstreamsolutions.org/skip-the-stuff

Technical Assistance for Residents

Description: Technical assistance for residents is a program where experts go into the field to provide on-site assistance to single family and multifamily residents. The goal

is to increase residential participation in waste reduction programs and reduce barriers to success. This is especially important for residents of multifamily apartment buildings where recycling and composting can often be tricky.

Example: The Recycling Partnership provides an online multifamily toolkit with materials that municipalities can provide during technical assistance.

More information: https://recyclingpartnership.org/multifamily/

Technical Assistance for Businesses

Description: Technical assistance for businesses is a program that provides businesses with assistance when creating or expanding waste reduction programs.

Example: Missoula, Montana has a Pledge Zero Program for businesses, institutions, and organizations that directs them on how to reduce waste.

More information: https://www.zerobyfiftymissoula.com/pledgeprogram

Residential Recycling Collection System Report

The cost evaluation conducted for initiative *2.6 – Universal Residential Curbside Collection* assumes a single-stream automated approach to universal residential curbside recycling collection. This assumption allowed current City route data and collection costs to be used as a proxy for the cost of implementing a curbside recycling program as part of universal residential collection services. A report produced concurrently with the development of this plan provides discussion of alternative approaches to residential curbside recycling collection based upon research and case studies of communities comparable to the City of Helena.

The Residential Recycling Collection System Report provides a detailed analysis of recycling diversion potential among City of Helena single family residences. Descriptions of alternative approaches provide a general overview of collection systems used in other communities. A cost comparison analysis applies current City collection route data, City staffing costs, and City recycling processing costs in conjunction with data from case studies and research to evaluate seven alternative collection approaches. The cost comparison offers insights into the system costs and efficiencies of each approach. Total system costs are evaluated on a per-household-per-month and a per-ton-recycled basis. Recommendations for residential curbside recycling for the City of Helena are offered.

The report will be included as a final addendum to this plan.

Legislative Diversion Actions

Legislative action can be a very effective lever for increasing diversion. Legislative action can be taken at the national, state, and local levels. The following table includes examples of national, state, and local action that could be taken. The actions are further detailed in *Appendix E – Legislative Diversion Actions*.

Legislative Diversion Action			
Bottle Bill	X	X	
Farm Equipment Right to Repair	X	X	
Repeal HB 407 & Replace with Statewide Product Policies		X	
#skipthestuff Ordinance			X
Disposal Bans at County Landfills			X
Hauler Equal Volume Diversion Ordinance (Phase 3)			X
Community Recycling Ordinance (Phase 3)			X
Construction, Deconstruction & Demolition Ordinance (Phase 3)			X
Equal Space Ordinance			X

Figure 11

Available Federal Funding

With the recent passage of the Bipartisan Infrastructure Act, $325 million is now flowing from the U.S. Environmental Protection Agency (EPA) into local communities, $250 million for development of facilities and $75 million for development of outreach and education programs.[1] Other Federal agencies also are funding the growth of recycling infrastructure, including the U.S. Department of Energy, U.S. Department of Labor, and the U.S. Department of Agriculture. There are other federal funding sources for local economic development that have been used to fund recycling infrastructure in other locations.

Led by Sen. Shelley Moore Capito, R-W.Va., a new bill has been introduced called the Recycling Infrastructure and Accessibility Act. This Act would direct the EPA to award grants between $1 million and $15 million each for projects that make recycling programs more accessible to rural and disadvantaged communities. Grants would specifically support hub-and-spoke recycling systems featuring transfer stations and those that leverage public-private partnerships.[2] Introduced in March 2022, the bill has seen widespread recycling industry support.[3]

1 https://www.wastedive.com/news/biden-infrastructure-investment-jobs-act-recycling/609882/
2 https://www.epw.senate.gov/public/_cache/files/1/5/1585fd68-fb9d-43df-b7f8-0942f3a18dd4/D934B6DC03F5EBA523587E121EC8E0BC.rya22020.pdf
3 https://www.capito.senate.gov/news/press-releases/overwhelming-support-continues-for-capito-carper-boozman-recycling-bill

Appendices

Appendix A – Diversion, Disposal, and Generation Methodology

Appendix B – Waste Reduction Initiative Summaries

Appendix C – Impact Analysis Methodology

Appendix D – Community Partner Initiatives

Appendix E – Legislative Diversion Actions

Appendix F – Community Outreach & Engagement

Appendix A – Diversion, Disposal, and Generation Methodology

Overview

An analysis of available data provided a baseline estimated diversion rate for the City of Helena. The baseline data year was 2019.

Diversion is the act of redirecting discarded materials away from disposal usually through recycling and composting. Diversion is measured in tons.

Disposal is the act of disposing of discarded materials in a landfill or incinerator. Disposal is measured in tons.

Generation is the total combined diversion and disposal. Generation is measured in tons.

A **Diversion Rate** is calculated by dividing tons diverted by tons generated for a given time period. The time period used in calculating the City of Helena diversion rate was 2019.

2019 Diversion Rate = 2019 Diversion / (2019 Diversion + 2019 Disposal)

Data Analysis Methodology

Transfer Station Data

The City of Helena Transfer Station permit system allows for tracking of landfill-bound discards by generator (City vs. Scratch Gravel residents). There is no system in place to track the origin of materials diverted (recycled or composted) through the Transfer Station or drop-off recycling centers. This is primarily due to the fact that the drop-off centers are open to the public and used by residents and businesses from the City of Helena and the Scratch Gravel district. Additional factors that contribute to the difficulty in tracking diversion by generator include anecdotal evidence suggesting that people often do not report recyclables in Transfer Station weighed loads as well as the Transfer Station practice of not tracking the loads of Renter Recycling Permit holders.

Due to lack of available City-specific 2019 Transfer Station recycling data, a methodology was developed to use available landfill disposal data as a proxy for determining what portion of total diversion could be attributed to the City of Helena. Columns A, B, and D in the table below contain actual Transfer Station data. Column C shows 72% of all Transfer Station tons to landfill in 2019 originated from City of Helena residents and businesses. The column C factor is applied to actual diversion data (column D) in order to calculate a tons diverted estimate of 5,672 tons attributed to the City of Helena (column C x column D = column E). The diversion estimate factor was also applied to diversion data received from local materials management businesses that were unable to provide City of Helena-specific data. Those data are discussed below.

A	B	C	D	E
Total Disposal (Landfill)	Helena Disposal (Landfill)	Percentage of Disposal from City of Helena (Column B divided by A)	Total Diversion (Recycle & Compost)	Portion of Diversion attributed to City of Helena
27,593 tons	19,962 tons	72%	7,840 tons	5,672 tons

Another consideration in this analysis was how best to account for the automotive materials collected separately at the City of Helena Transfer Station. Those include tires, automotive batteries, used motor oil, and antifreeze. While tires are source-separated they are not directed to a recycling market. Tires are quartered and disposed of in the Lewis & Clark County landfill. Used motor oil is used as a fuel supply for oil burners at the City shops as well as the County landfill. Antifreeze is reused in City of Helena fleet vehicles. Automotive batteries are recycled through a partnership with Interstate Batteries. Tires are, year-over-year, the largest portion of the automotive materials stream collected at the Transfer Station. Due to the fact that the tires are landfilled, tires (119.5 tons) were deducted from the 2019 Transfer Station recycling total for the purposes of the diversion analysis.

Additional Data Sources

Entities that provided actual 2019 data for the City of Helena were:

- Tri-County Disposal/Valley View Landfill (disposal and diversion data)
- Helena Recycling (City of Helena residential curbside collection diversion data)

The diversion estimate factor discussed above was applied to the 2019 data from entities who were unable to provide City of Helena-specific figures. Those entities were:

- Pacific Steel and Recycling (total 2019 diversion data)
- Helena Recycling (total 2019 diversion data)
- 406 Recycling (total 2019 diversion data)

In some cases more than one entity reported the same recycling data. For instance, most of the materials recycled at the Transfer Station flow through either Pacific Steel and Recycling or Helena Recycling for processing and marketing. The methodology used to calculate the 2019 City of Helena diversion rate estimate avoided double counting by accounting for those material flows.

Diversion Rate Estimate Caveat

As noted in the report, this diversion rate methodology generates a best-guess estimate for what the City of Helena diverted from landfills in 2019. Additional 2019 diversion activities that took place in the City of Helena likely included edible food rescue, backyard composting, donating to and purchasing from thrift stores, product repair, and informal “sharing economy” activities such as through yard sales and social media groups. The 2019 diversion rate estimate did not include any material diverted through those activities.

Appendix B – Waste Reduction Initiative Summaries

Initiative: 1.1 – Community Education
Initiative Type: Program
Hierarchy Level: Reduce/Reuse/Recycle/Compost

Initiative Background and Essential Information

Background:
Community education is essential when embarking on waste reduction initiatives. This community education will include outreach about new waste reduction programs, education on what, how, and why to reduce the amount of discarded materials they send to the landfill, and include technical assistance when needed. With enhanced outreach and education, there is a greater likelihood that new waste reduction programs will be successful. The education and outreach that is created and carried out will focus on programs related to reduce, reuse, recycle, and compost.

Local and Regional Examples:
Gallatin Solid Waste Management District has a variety of recycling education resources including tours, presentations, and education materials. It also has a list of local, regional, and national resources that can help with diversion efforts. Flathead Valley created the WasteNot project to help the community learn how to reduce and recycle locally.

Missoula has created an online Deconstruction Resource Guide that provides information on who does deconstruction and how to divert usable building materials.

zerobyfiftymissoula.com is a one-stop shop for all things Zero Waste in Missoula. It includes a "What Do I Do With…?" section with source reduction, reuse, and recycling options for 25 categories of materials and contact information for local service providers when appropriate. It also includes a Zero Waste Events Toolkit, print-ready signage for use at businesses, schools, and events, and many other community resources.

The Zero Waste Ambassadors Program (ZWAP!) was developed by Home ReSource in Missoula to engage 5th graders and encourage them to become leaders in community sustainability. The program now has an online version that can be used in other communities.

The Montana Material Exchange is a free bulletin board service where anyone can find an item, give it away, buy it, sell it, or trade it. It is a service provided by the MSU Extension Pollution Prevention Program.

Eco-Cycle in Boulder, CO has developed educational material on recycling, composting and reuse. It also has a School Recycling and Environmental Education program for Boulder schools. Eco-Cycle has created a 10-part Zero Waste video series, a video featuring Captain Zero Waste and a video on recycling at Boulder County Recycling Center featuring Mr. Can, and all its videos come with downloaded activities.

The Pitkin County Solid Waste Center at the Pitkin County Landfill in Pitkin County, CO provides access to a detailed diversion guide, downloadable educational newspaper ads and videos, and school curriculum through its website.

Campus Race to Zero Waste is a program designed to challenge universities to reduce waste and recycle right. Montana State University in Bozeman joined in 2021.

National Examples:
#SkiptheStuff is a campaign with the goal of reducing unnecessary distribution of take-out food accessories. This campaign saves the restaurant time and money by only giving out accessories when the customer asks for them.

Community-based social marketing is an example of a type of educational campaign and included the following components:

- Identify a behavior to change
- Identify the barriers to the behavior
- Develop a pilot program to overcome the barriers
- Implement the program across the community
- Evaluate the effectiveness of the program

Examples of community-customizable web-based education platforms to support community recycling collection programs include: https://recyclist.co/ and https://recyclecoach.com/.

The U.S. EPA has a website dedicated to tools, resources, information, and data on reducing food loss and waste called Sustainable Management of Food. Here municipalities can gather resources for businesses and organizations on reducing their food loss and begin following the food-recovery hierarchy. The food-recovery hierarchy shows different management pathways to reduce food waste and can be a guide for the food service industry to follow. This website also provides resources and information for community members to begin their wasted food reduction efforts.

Save the Food is a resource produced by the Natural Resources Defense Council and geared towards consumer level actions that can be done to prevent food from being wasted. Still Tasty is another online resource that consumers can use to prevent food from being wasted.

Initiative Proposed Action

Proposed Action:
Community education is one of the most important and comprehensive waste reduction initiatives and it should work in tandem with all the waste reduction programs and policies that are initiated. The components of community education include:

- **Targeted, Program-specific Education:** to promote strategies for waste reduction, reuse, recycling, and composting to all sectors of Helena based on the program initiated. For example, in regards to Helena's recycling program, educational materials can be created to inform residents how to recycle, what goes into the bins, what day to place it at the curb, and why it is important to participate in the program.
- **Informational Website:** to provide an online portal of waste reduction information for all sectors in Helena. This can include information on why Helena is working towards diverting materials from the landfill and how the community can participate. This can include videos, fact sheets, sector-based information, and Helena waste data. There should be links to current programs and all the information community members need to begin their own journey to reduce the amount of discarded material they send to the landfill. This online community education portal can also clearly and simply highlight the current opportunities for diversion through drop off centers, subscription based recycling and composting programs, opportunities to divert materials at the transfer station, and local reuse/thrift stores. This can become the central location for all waste reduction information for Helena and should be updated frequently.
- **Ready-to-Use Educational Materials:** The online community education site can have

materials and resources ready to use for online communication through social media posts, in print publications, and for use at in-person events. The materials and resources related to Helena's waste reduction can be communicated at outreach events, festivals, art shows, and it can be used by community partners. There could be door hangers and print media including billboards or bus decals. All the material and resources produced through community education should be clear with consistent messaging and have simple branding.

- **Campaign-specific Educational Materials:** Community education can be created for a #skipthestuff campaign, food waste reduction campaign, or provide information on deconstruction instead of demolition. These programs and correlating education can be crucial to creating successful waste reduction initiatives. Community education should also be created relating to reuse. This can highlight the local reuse/thrift stores, what is and is not acceptable, the benefits to buying used, and how this relates to waste reduction in Helena. This beneficial reuse campaign will be a win for the local reuse economy and help keep valuable resources in use in Helena.
- **Technical Assistance for Residents:** Helenans may need assistance with some waste reduction initiatives depending on the sector and the level of difficulty during implementation. Technical assistance provides the on-site instruction and information that is needed for a waste reduction program to be successful. Examples of when technical assistance may be needed are to assist multifamily residential communities that are working on recycling or composting. Multifamily waste reduction, reuse, recycling, and composting can be difficult. These resources can help municipalities with case studies, best practices, and materials that work: Guide to Multifamily Recycling, Complex Recycling Issues Strategies for Record-Setting Waste Reduction in Multifamily Dwellings, and Exploring Multifamily Recycling.
- **Technical Assistance for Businesses:** Technical assistance can be the bridge to success that brings education on site and directly to a specific sector. For example, assistance may be needed by a food-generating business and food bank operators when beginning or expanding a food rescue program.

Community education will be initiated in the beginning of this next era of Helena's waste reduction journey and be continuous. This should be ongoing and have consistent, simple messaging that is updated regularly as Helena initiates more programs related to its waste reduction goals.

Education and Outreach Mechanisms

Proposed Education and Outreach:
Community education is a comprehensive approach to delivering education and outreach to all sectors of Helena about waste reduction. It can include a dedicated website, materials and resources for each sector, and multifamily information. Community education can be delivered online, in-person, or directly to the sector. It should be ongoing, simple, consistent, and help the community work together to achieve waste reduction goals.

Metrics

1.1 – Community Education	Phase 1 (2022-24)
Diversion Potential (Tons)	4,030
GHG Emissions Reduction Potential (MTCO2e)	5,650
One-time Costs $	8,500
Annual Costs $	115,600

Potential Impacts

Potential Impact:
The goal of community education is for the community to understand what waste reduction programs exist and how to use them effectively. That requires information and engagement targeted to each specific program. For example, when a program is created, such as rescuing edible food to feed those in need, community-wide program education must be accompanied by sector-specific engagement to those most impacted by the program. The sector-specific education and technical assistance should include information on what is going to happen during the program, how the program will work, and why this program is important.

Community education is successful when the community is engaged in the waste reduction program initiated, and when there is a reduction in the targeted material being sent to the landfill. Generally, the waste reduction initiatives work in tandem, therefore the community education enhances the program and together they will provide the desired result of waste reduction in Helena.

Implementation Timeframe

Short – Phase 1 (2022-2024)

Initiative: 1.2 – Community Incentives
Initiative Type: Program
Hierarchy Level: Reduce/Reuse/Recycle/Compost

Initiative Background and Essential Information

Background:
A community incentive program can provide motivation to residents, businesses, organizations, or institutions to participate in waste reduction initiatives. Incentive programs work by motivating the target audience to do the desired behavior. Motivation can be through either economic or social incentives, or both. The City of Helena can create its own incentive program or encourage the private sector to create incentive programs that encourage behaviors to help Helena reach its waste reduction goals.

Local and Regional Examples:
Missoula's Zero by Fifty goal includes a Pledge Zero Program, whereby businesses, organizations, and institutions take a pledge agreeing to the goal of Zero Waste by 2050. Participants conduct a waste audit and agree to waste reduction initiatives. They then receive technical assistance, a window decal, and website recognition for their pledge and commitment to work towards Zero Waste.

The Business Leader Program in Teton County, WY is a membership based sustainable business recognition program. This program is operated by the Teton County Integrated Solid Waste and Recycling Department in conjunction with the Zero Waste goal to achieve 60% diversion from the landfill by 2030.

EcoCycle, Boulder, CO has a Green Star Business Program. Businesses that join get training, promotion, and peer to peer support. They also receive website recognition along with a window decal.

National Examples:
Pay-As-You-Throw (PAYT) is a curbside residential program that incentivizes residents to reduce the amount of materials going to the landfill or incinerator by creating a tiered or metered trash system. PAYT systems may use bags or carts, and the more a resident throws away or the larger the resident's cart, the more the resident pays. This incentivizes residents to reduce, reuse, recycle and compost.

Recyclebank is a membership program that awards points for completing certain environmentally beneficial actions, such as recycling. Points earned can be redeemed for products or coupons, or can be used to make a donation. This incentive based program could be adopted in Helena or a similar program could be created.

U.S. Army Fort Bragg has a recycling incentive program called Bragg about Recycling that provides a monetary voucher for recycling certain types of materials. This program was initiated because of the Department of Defense's goal of diverting 40% of its waste from landfill and incinerator. This type of program is a great motivator for individuals to help a larger entity reach its goal.

The FundingFactory is an incentive-based program that pays organizations to return used toner and inkjet cartridges for recycling.

Hollywood, FL has a recycling incentive program with EnviroPerks (formerly Recycling Perks). Community members who set out their recycling carts weekly receive “Perk Points” that can be used for coupons, discounts, and special deals with local and national vendors.

Initiative Proposed Action

Proposed Action:
Create community incentive programs that target waste reduction and diversion goals for residents, businesses, organizations, and institutions. Some incentive programs to consider could be:

- **Recycling Incentive Program** - The City of Helena can partner with an established incentive program like RecycleBank, FundingFactory, EnviroPerks, or other similar organizations or can create its own system.
- **PAYT program for single-family residents** - Implement a cart based system through which the customer is charged by cart size. There are often 3 or 4 cart sizes, and the monthly fee increases with the cart size. This incentivizes single-family residents to reduce, reuse, recycle, and compost.
- **Business Recognition Program** - Create a business recognition program for the City of Helena. Criteria will be set and can include a waste audit, data collection, commitments to waste reduction initiatives, and a window sticker for recognition. Missoula’s Pledge Zero Program could be mirrored. This incentive program motivates business owners to reduce their waste by getting recognition for their effort.

Community incentive programs will be initiated right away and be clearly communicated on an ongoing basis.

Education and Outreach Mechanisms

Proposed Education and Outreach:
A community incentive program should have corresponding education and outreach, so the community is aware of the program and knows how to get involved. This education could be conducted at community events, on the city’s waste reduction website, or through social media. There should be a concerted effort to communicate the waste reduction incentive programs to help the City of Helena reach its goals.

Metrics

1.2 – Community Incentives	**Phase 1 (2022-24)**
Diversion Potential (Tons)	3,090
GHG Emissions Reduction Potential (MTCO2e)	3,880
One-time Costs $	8,500
Annual Costs $	7,000

Potential Impact
Potential Impact: The goal of a community incentive program is to motivate individuals, businesses, institutions, and organizations to participate in the waste reduction and diversion programs created to help Helena reach its waste reduction goals. Incentives for Helena community members, combined with programs and education, will help the City reach its waste reduction goals. After several years of waste reduction programs and incentives, the City of Helena could conduct a survey of community members to gauge what worked best. The survey could also glean from community members what initiatives they participated in to help Helena reduce waste.
Implementation Timeframe
Short – Phase 1 (2022-2024)

Initiative: 1.3 – Community Reuse Support
Initiative Type: Program
Hierarchy Level: Reuse

Initiative Background and Essential Information

Background:
This initiative addresses the local reuse economy with suggestions on supporting efforts to keep durable and reusable items out of the landfill. Reuse is high in the Zero Waste International Alliance's Hierarchy of Highest and Best Use, and therefore reuse should be an important part of a waste reduction plan. Reusable materials can include durable goods, building materials, clothing and textiles, and household items.

Reuse of durable goods helps to create good green local jobs, offers low cost items to the community, reduces the materials going to the landfill, and supports the local circular economy. It also reduces the greenhouse gas emissions and water and air pollution associated with mining resources, and manufacturing and transportation of new items. The REUSE Primer defines reuse as "*extending the life of a product, packaging or resource by 1) using it more than once with little to no processing (same or new function), 2) repairing it so it can be used longer, 3) sharing or renting it, or 4) selling or donating it to another party. It should be noted that even though reuse always reduces waste, source reduction doesn't always incorporate reuse. Ideally, when products reach end of life (e.g. used, repaired, repeat) it would then be recycled.*"

Local and Regional Examples:
Boulder County, CO has many reuse programs in place including a tool lending library and fix-it clinics. Boulder County residents are also encouraged to use an online trading site for building materials (buildingsurplus.com) and they have access to reusable building materials at Resource Central, a large reuse center with a salvage yard, warehouse, and showroom. Home ReSource, a building materials reuse center in Missoula, MT, also hosts Fixit Clinics with the goal of demystifying repair, skill-sharing, and keeping items functioning.

National Examples:
In Austin, TX there is a program where Austinites can request a pickup of clothes, textiles, or household items. They are mailed a bag to put the items in, and then the bag is placed curbside for pick up for reuse or recycling. This program is a collaborative effort between Austin Resource Recovery and Goodwill Central Texas. Central Contra Costa Solid Waste Authority in California hosts a Reuse Day in partnership with Recycle Smart, Mt Diablo Resource Recovery, and Republic Services where residents can place durable items at the curb to be collected and kept in the local reuse economy. Residents receive this information sheet with their Reuse Day date when they sign up. CVSan hosts a Bulky and Reuse Pickup program in Alameda County, CA. Residents can schedule one Bulky and Reuse pickup a year for free. CVSan also offers a textile collection system twice a year. Fixit Clinic and Repair Café are model programs that set standards on repair events that local communities and community groups can produce. The goal of these events is to keep reusable items, like clothing, electronics, furniture, and household items in use longer. Communities and community groups across the country have held Fixit Clinics and Repair Cafés such as Hennepin County, MN and Chandler, AZ.

Initiative Proposed Action

Proposed Action:
The goal of Community Reuse Support is to grow and connect the local reuse industry with the community by providing the best available information and system to keep durable and reusable items out of the landfill. Possible components of Community Reuse Support are:

- **Reuse and Repair Directory:** Create a directory that lists local repair and reuse (nonprofits & small local stores) in Helena. This will include thrift stores, creative reuse stores, antique stores, and repair stores. Helena could create a website like Austin's Reuse Directory.
- **City-wide garage sale:** Organized by neighborhood or community wide, sales could be once a year, such as in conjunction with graduation at Carroll College, or quarterly based on interest.
- **Reuse Campaign:** Develop a campaign that would complement the Reuse and Repair Directory but goes beyond that to identify barriers and benefits to shopping used. The data the city will collect regarding barriers can be used to enhance the local reuse economy. This campaign can also include specific information on what the local thrift stores accept and do not accept along with reasons to shop local and shop used.

Community Reuse Support is an ongoing program that overlaps with Community Education.

Education and Outreach Mechanisms

Proposed Education and Outreach:
Education should be created on reuse including information on why this is part of waste reduction, how to keep items longer (i.e., repair), where to buy used (via the directory), and the best way to support the local reuse economy. This Reuse Campaign (see last bullet in above section) will help the community members and local reuse industry enhance and embrace reuse.

Metrics

1.3 – Community Reuse Support	Phase 1 (2022-24)
Diversion Potential (Tons)	560
GHG Emissions Reduction Potential (MTCO2e)	1,460
One-time Costs $	8,500
Annual Costs $	7,000

Initiative Potential Impact

Potential Impact:
Community Reuse Support will help build up and amplify the local reuse sector. The outcome will be a greater understanding of how and why to keep reusable material in use through the local reuse economy. The goal is to keep reuse items, like clothing, furniture, household

goods, and other items out of the landfill and in use in the local reuse economy.
Implementation Timeframe
Short – Phase 1 (2022-2024)

Initiative: 1.4 – Lead by Example
Initiative Type: Program
Hierarchy Level: Reduce/Reuse/Recycle/Compost

Initiative Background and Essential Information

Background:
When embarking on a waste reduction effort community wide, it shows great leadership to implement waste reduction initiatives (e.g., reduction efforts, sustainable procurement, recycling, and composting) in municipal buildings and on public property. Demonstrating best waste reduction practices can lead the way to community wide culture change and acceptance of waste reduction initiatives in Helena. By leading by example, the City of Helena will generate more support for its waste reduction goals and provide a model for local businesses, institutions, and residents to join in the waste reduction efforts.

Local and Regional Examples:
Boulder County, CO government (page 7) is leading the way by providing recycling and composting of food scraps in its municipal building. The City of Missoula has an All-In-One Recycling pilot project with Republic Services. City employees at City Hall, City Council Chambers, and the Missoula Redevelopment Agency and citizens visiting these locations have access to blue bins for recycling.

National Examples:
The City of Orlando, FL has a Sustainable Procurement Policy. Its goal is to conserve resources, promote worker health, and prevent pollution.The City of Portland, OR has a Sustainable Procurement Program that promotes green purchasing, sustainable supply chain analysis, and a green spend metrics program. This U.S. EPA website: Sustainable Marketplace: Greener Products and Services gives a wealth of sector-based information about products and services that allow for voluntary sustainable actions and program creation. Alameda County, CA holds a Green Purchasing Roundtable to discuss best practices related to green purchasing programs.

Initiative Proposed Action

Proposed Action:
Lead by Example is a forward-facing effort by the municipality to implement waste reduction strategies in its buildings and in City-owned public spaces. These initiatives are shared with the community to garner support and to help create the culture change that is needed to reach the goals. Lead by Example components are:

- **Municipal buildings:** Create a waste reduction environment by implementing reduction programs such as printing less or printing double sided. Create a surplus exchange program within the municipal government. This can include furniture, office supplies, and other items. Create recycling and/or composting stations in common areas and contract with haulers for this service. Create interdepartmental green teams. Encourage the use of municipal water sources instead of single-use bottled water. Create a breakroom environment where reusable mugs, plates, cups, and silverware use are encouraged. Communicate this effort with the public through an outreach program.
- **Sustainable procurement:** Ensure that City purchases are made with the waste reduction goal in mind. Establish standards for purchases including buying

refurbished, buying used, buying durable items and/or make purchases via the State of Montana Environmentally Preferable Procurement program using the existing MOU between the City of Helena and the State. Also buy post-consumer recycled content products when appropriate and applicable. Create a system of using reusable foodware at employee only gatherings and City events open to the public. If disposable foodware is used and composting is available and accepts "compostable" foodware, then the City of Helena should consider purchasing per and polyfluoroalkyl substances (PFAS) free compostable materials. City government could buy locally produced soil amendment to use on public spaces when that product is needed. This sets an excellent example and closes the loop on resource use.

- **Public spaces:** Where applicable, provide public receptacles and signage that encourage Helena citizens to recycle and/or compost. Provide training to City employees that manage these receptacles. The City may want to have fewer trash receptacles overall, but those in public spaces could be paired with recycling and composting receptacles.
- **Sustainable events program:** Establish guidelines for events on public property where sustainable practices are encouraged through an incentive program. Encourage events to create a system to reduce and divert their discarded materials through recycling and composting. Encourage the use of PFAS free compostable materials and follow #SkiptheStuff guidelines. Provide tools and guidance through education, such as toolkits tailored to Helena (e.g., Missoula's ZERO by FIFTY Zero Waste Event Toolkit), and incentives.

Lead by Example is a program to begin right away. The program is ongoing and should be continually updated and communicated to the community.

Education and Outreach Mechanisms

Proposed Education and Outreach:
When the city "leads by example" the initiatives it includes in its everyday practices should be communicated to the residents, businesses, and institutions to move the needle towards a culture of waste reduction in everyday behaviors. This is accomplished through ongoing, simple, and consistent education on social media, at local events, on the City's dedicated waste reduction website, and communicated when the public visits municipal buildings and public spaces. These efforts could be celebrated on Earth Day and America Recycles Day to encourage others to follow the lead of the City.

Metrics

1.4 – Lead by Example	**Phase 1 (2022-24)**
Diversion Potential (Tons)	960
GHG Emissions Reduction Potential (MTCO2e)	1,470
One-time Costs $	5,200
Annual Costs $	12,000

Potential Impact
Potential Impact: Lead by example is an important initiative for a municipality to take on because it can set the stage for other waste reduction initiatives to be accepted and embraced by the community.
Implementation Timeframe
Short – Phase 1 (2022-2024)

Initiative: 2.5 – Recycling & Composting Infrastructure
Initiative Type: Infrastructure
Hierarchy Level: Recycle/Compost

Initiative Background and Essential Information

Background:
Communities that wish to divert materials from landfill disposal require sufficient local capacity to manage those diverted materials. The City of Helena must arrange for sufficient organics and recycling processing capacity to accomodate the increase in compostable and recyclable materials that will be diverted as the City moves toward its waste reduction goal.

Lewis and Clark County currently has a composting operation at the County-owned landfill that composts City yard debris. While the compost product has historically been used within the landfill for different purposes, the current operation could be expanded to accept food scraps and refocused on creating a valuable soil amendment.

Local and Regional Examples:
In 2016, the year the ZERO by FIFTY goal was adopted, the **City of Missoula, MT** (population 73,489) purchased an existing privately-owned biosolids composting operation adjacent to its wastewater treatment plant. State-of-the-art upgrades included installation of an aerated static pile system. Along with biosolids, the facility, now called Garden City Compost, accepts all food scraps, BPI-certified compostable items, pallets, untreated wood scraps from deconstruction projects, yard debris, and land clearing debris. The facility is operated by City staff and is open to the public for drop-off and for purchase of finished compost March through December. The facility is open to commercial organics haulers like Missoula Compost Collection year-round.

The composting operation at the Pitkin County Solid Waste Center on the Pitkin County Landfill in **Pitkin County, CO** (population 17,767) processes yard debris and food scraps to create a nutrient-rich compost that is sold back to the community. This conserves the environment and extends the life of the county landfill by reducing waste generation through education, recycling, and reusing valuable commodities with innovative programs and providing safe and ethical disposal for all other materials.

Montana's recycling processing facilities are primarily owned and operated by the private sector. Some processors are locally-owned and operated, such as Helena Recycling, which opened a recycling facility near the gates of the Valley View Landfill in East Helena in 2016 and Pacific Steel & Recycling. Others include Earth First Aid in Billings and Four Corners Recycling in Bozeman. Larger national companies have invested in such facilities as well, such as Waste Connections, which owns Valley Recycling in Kalispell, and Republic Services, which owns a number of recycling facilities across the state. The Lake County Transfer Station & Recycling Center in Lake County, MT (population 30,013) is a municipal drop-off center that markets materials directly from the County-owned facility. Every ton diverted saves the facility $52/ton in avoided disposal costs. According to Mark Nelson, Lake County Solid Waste Manager, those savings are what covers labor and capital costs. Processing costs are estimated to be $40/ton and include labor, transportation, power, and equipment costs. Due to the volatility of recycling markets, revenue from recycling is seen as a bonus.

National Examples:
The Dalton-Whitfield Solid Waste Authority in **Whitfield County, GA** (population 104,628) constructed a $2 million, 40,000 square foot materials recovery facility (MRF) at the county landfill funded by the Authority's enterprise fund. Although the facility was primarily designed to divert carpet industry solid waste from the Subtitle D landfill, the MRF currently processes and markets #1 & #2 plastic bottles & jugs, newspaper & magazines, mixed paper, bi-metal cans, telephone books, cardboard, aluminum cans, glass (clear, brown, blue, & green) as well as carpet, carpet pad, and tubes, cores, and cones from the carpet industry. The MRF utilizes four full-time employees and an inmate labor crew. The MRF can process over 100 tons per day, store up to 20 trailer loads of baled recyclables, and can deliver 25 to 50 trailer loads to market each month.

Initiative Proposed Action

Proposed Action:
The following proposed actions are Phase 1 planning and development activities. The implementation of the resulting facilities will occur in Phase 2.

- **Develop or contract for development of a materials recovery facility (MRF)** that will meet Helena's recycling needs for up to the next 20 years
- **Develop or contract for development of a state-of-the-art composting operation** that will meet Helena's composting needs for up to the next 20 years (possibly at the county landfill in partnership with Lewis & Clark County)
    - A key consideration in evaluating the type of organics processing capacity to be developed will be the type of feedstock that can be processed at the facility or facilities. Facility feedstock requirements will directly impact how organic materials are collected in the community and will need to inform development of the Universal Residential Curbside Collection program for organics diversion. The biggest question is whether to collect yard debris and food scraps in the same container, as food scraps need to be collected year-round on a weekly basis, and yard debris only is collected seasonally.

Education and Outreach Mechanisms

Proposed Education and Outreach:
Development of infrastructure in support of Helena's waste reduction goal will likely be a point of pride for Helenans. The City can maximize opportunities for community education and outreach throughout the process as a means to build community excitement about, awareness of, and interest in upcoming diversion programs. Using the City of Helena Public Engagement Guide, staff can determine how best to share information and provide opportunities for public involvement throughout the planning and development process. One outcome of such engagement will be an informed citizenry ready to utilize the new facilities.

Metrics

2.5 – Recycling and Composting Infrastructure	Phase 2 (2025-30)
Diversion Potential (Tons)	850
GHG Emissions Reduction Potential (MTCO2e)	1,330
One-time Costs $	11,200
Annual Costs $	391,700

Initiative Potential Impact

Potential Impact:
Sufficient, reliable, infrastructure able to scale capacity to meet the demands of a growing community is a prerequisite for high diversion. Recycling is a regional, national, and international market. Considering the City of Helena's distance from many markets and low material quantity due to population size, the net value of recyclables will depend on their quality. While recycling processing investment decisions should be made with the highest quality of outbound materials in mind, processing is but one aspect of a system that will only work best, and generate the highest-grade materials, through robust education and appropriate collection. Organics is inherently a local market. State-of-the-art organics processing that ensures the production of a high-grade saleable compost product should be the goal for investments in composting infrastructure. In both cases, infrastructure requires significant planning and development as well as financial and social capital in the short term (Phase 1) in order for implementation to be possible in the medium term (Phase 2).

Implementation Timeframe

Short – Phase 1 (planning & development) – 2022-2024
Medium – Phase 2 (implementation) – 2025-2030

Initiative: 2.6 – Universal Residential Curbside Collection
Initiative Type: Program
Hierarchy Level: Reuse/Recycle/Compost

Initiative Background and Essential Information

Background:
Universal Residential Curbside Collection programs make diversion accessible to all by providing affordable collection of compostable and recyclable materials separate from trash as a base level of service. Universal Residential Curbside Collection programs address barriers to participation, such as cost, thereby making diversion as convenient as wasting. A key outcome of these programs is a reduction in wasted material directed to landfill disposal.

The City of Helena currently provides weekly curbside trash collection to all residents in housing with 4 units or fewer. This is commonly referred to as "single family residential." Trash collection is paid for through an annual waste assessment of $176.10 on each residential property. Residents interested in curbside recycling or composting collection must opt-in on a subscription basis through the City-contracted service providers. Helena Recycling provides bi-weekly curbside source-separated recycling of 5 streams: glass bottles and jars, steel and aluminum cans, #1 and #2 plastic containers, mixed paper, and cardboard. That service is subsidized at $4/month through the annual waste assessment; customers pay an additional $8/month out-of-pocket. Better Roots Composting and 406 Compost provide curbside organics collection services. Those services are not subsidized; customers pay an additional $15-$20/month out-of-pocket for those organics diversion services. Under the current system, customers who choose to divert through curbside services pay far more than those who choose to send all discards to landfill. This discrepancy creates a strong disincentive to divert. The single-family residential sector is responsible for 31% of Helena's landfill disposal.

Local and Regional Examples:
The City of **Spokane, WA** (population 217,353) provides solid waste collection services with unit-based pricing (aka Pay As You Throw, PAYT) for residential customers. Households can choose between 3 sizes of garbage carts: $19.18/mo. for a 32-gallon cart, $34.71/mo. for a 68-gallon cart, or $50.68/mo. for a 95-gallon cart. Garbage collection in those carts occurs weekly. Included with that cost, all customers are provided with a 65-gallon cart for single-stream recycling. Recycling collection occurs every other week and recyclables are taken to a materials recovery facility owned and operated by Waste Management. Spokane also provides an optional yard waste and food scraps collection service. Customers pay an additional $18.31/mo. for weekly collection. The service runs from March through November, and is suspended during December, January, and February. Off-season collection can be provided for an additional cost of $4.58 per collection. Collection occurs on the same day as garbage pickup. Annual cost for the 32-gallon garbage cart with optional organics seasonal collection is approximately $450/household.

The curbside collection services provided to residents of the City of **Boise, ID** (population 226,115) through its Curb It program include weekly trash, every other week recycling, and weekly compost. Pricing is structured to incentivize the adoption of diversion behaviors. The cost for weekly 95-gallon cart trash service only is $33.49/mo. per household. However, the cost for weekly 95-gallon trash, every other week recycling, and weekly composting altogether is $21.77/mo. per household. Those prices are reduced slightly if a customer opts

for a smaller 48- or 64-gallon trash cart ($32.20 and $20.48 respectively). The City offers monthly collection of glass in 65-gallon carts for an additional $7.09/mo. per household. Annual cost for the 48- or 64-gallon trash cart with recycling and composting is approximately $275/household without glass and $360/household with glass.

The City of **Salem, OR** (population 179,522) in Marion County has a franchised hauler system for single family residential collection in which the community is divided into districts. Each district is serviced by a different hauler. One contracted hauler, D&O Garbage & Recycling, services approximately 15,000 residential households in Salem. All customers pay a rate of $32.05/mo for a 35-gallon garbage cart, a 95-gallon mixed organics cart, a 95-gallon mixed recycling cart, and an 18-gallon bin for the source-separated collection of glass. Customers can also set out additional materials for recycling (oil, coolant, transmission fluid, and batteries) and reuse (latex paint). A 2017 report shared by a Marion County representative indicated that the contamination rate for single family residential recycling in the Portland Metro area, where similar services are offered, was 9%. Annual cost for the 35-gallon garbage cart with optional organics seasonal collection is approximately $385/household.

The City of **Bellingham, WA** (population 88,764) contracts with Sanitary Service Company (SSC) to provide curbside collection services for approximately 20,000 single-family residences and multi-family units (1-4 units). Services include trash, weekly recycling, and every-other-week (EOW) organics collection. SSC offers EOW or once-a-month (OAM) trash collection for customers who wish to reduce their trash service.[1] Since the late 1980s, SSC's curbside recycling program has been source-separated. It currently collects mixed paper and commingled bottles, cans, glass, & plastic containers in open-style 18-gallon bins as well as flattened cardboard, scrap metal, used motor oil, automotive batteries, and cords, wiring and holiday lights.[2] All customers pay $6-7/month for recycling service embedded in their trash bill whether they choose to use it or not. SSC reports a recycling participation rate in the "high 90s" and a contamination rate of approximately 1 percent.[3]

The City of **Renton, WA** (population 101,484) pioneered an innovative contract with its private hauler that cost-effectively transitioned the community from weekly collection of recycling and garbage to every other week collection of recycling and garbage and weekly collection of compostable materials. In 2008, the City, which had not adjusted garbage rates since 2000, was facing a potentially large rate increase. Residents had manual collection of garbage from customer-provided containers and a source-separated, three-bin recycling collection system. The community wanted uniform cart-based collection, expanded recycling, and curbside compost collection that included food scraps. The City and Waste Management reduced overall system costs by transitioning to every other week collection for recycling and garbage, and weekly collection of compostable materials. In addition, the system reduced truck traffic, associated greenhouse gas emissions, and wear and tear on the roads and collection vehicles. From 2008 to 2010, residential recycling tons increased 27%, organics tons increased 44% and garbage tons decreased 18%.

In March 2022, citing safety, efficiency, cost, abuse, and service consistency, the City of **Billings, MT** (population 109,595) replaced all 300-gallon shared bins with 90-gallon carts. The City estimates between 20-25% more garbage in areas where there are 300 for residents compared to 90s for residents The difference the City considers "abuse" by residents, businesses, out-of-town persons who illegally dispose of refuse in the bins. The City also estimates that the overall collection time will not change despite there being three

[1] Email communication between Ann Brodsky and Rodd Pemble - 8/7/20
[2] http://www.ssc-inc.com/recycling_commercial.php#prepare - accessed 3/27/22
[3] Email communication between Ann Brodsky and Rodd Pemble - 8/7/20

times as many bins to service due to the efficiencies gained.

National Example:
Abington Township, PA (population 55,468) provides weekly dual-stream recycling, yard trimmings, and trash collection services with municipal crews in fully-automated trucks for 18,200 households. All collection services are provided on the same day. The town currently has 6 trash trucks that service 850 households per day and 6 recycling trucks that each service two routes per day (3 trucks are dedicated to paper collection and 3 trucks are dedicated to commingled container collection). The town provides dual-stream recycling in two carts (a 65-gallon cart for paper and a 35- or 65- gallon cart for commingled containers). Yard trimmings (grass clippings, leaves, small brush) collection is accepted March through January in 30-gallon brown biodegradable paper bags with a dedicated truck. Residents choose between a 95-, 65-, or 35-gallon cart provided by the Township for trash. The town has a high participation of 90%+ and residents are very well-educated in recycling. This system has enabled Abington Township to achieve a 57% diversion rate.

Initiative Proposed Action

Proposed Action: *(describe the components of this initiative, a timeline if applicable, if it's ongoing or one-time, and any other implementation components)*

The key component of Universal Residential Curbside Collection is to provide and bill all residents for regularly-scheduled collection for: Recycle, Compost, and Garbage. Details of each stream include:

- **Curbside collection of Recyclables**
  - Approaches to a universal recycling system for Helena are under review
  - Expand list of acceptable materials based on Be Heard Helena survey responses, as markets allow
- **Curbside collection of Compostables**
  - Approaches to consider:
    - Automated - Mixed organics collected weekly year-round: include food scraps and soiled paper with seasonal yard debris in 35-, 65-, or 95-gallon green carts
    - Manual - Food scraps and soiled paper collected weekly year-round in 5- or 10-gallon green buckets with lids; Yard debris collected weekly from April-October (or as seasonally appropriate) in 30-gallon brown biodegradable paper bags
    - Hybrid - Food scraps and soiled paper collected weekly in 10-gallon green buckets with lids; Yard debris collected weekly from April-October (or as seasonally appropriate) in 35-, 65-, or 95-gallon green carts (food scraps/paper could be added to cart during automated service months)
- **Curbside collection of Garbage (materials going to landfill)**
  - Metered service (reframing trash service as a utility like electric and water - the less you use, the less you pay) with variable rates depending on how much service used (also referred to as Pay As You Throw - with smaller trash cart as the default level of service and larger trash carts available at added cost)

- Approaches to consider:
  - Switch to every-other-week collection of garbage and weekly collection of organics, which is allowable under City code. Consider offering an option for once a month (OAM) trash service (like Bellingham).
  - Maintain weekly collection and offer households with an assigned cart the option to reduce the size of the garbage cart (35- or 65-gallon)
  - Maintain weekly collection and recalculate distribution of shared 300-gallon alley bins from 3 households/bin (100 gallons/household) to 5 or 10 households/bin (60 or 30 gallons/household); Remove surplus bins
  - Maintain weekly collection and remove shared 300-gallon alley bins; require all households to choose a desired cart size (35-, 65-, 95-gallon)

Program Considerations:
These could be implemented individually or in combination:

- Same-day-of-week collection (alternating weeks for recycle and materials going to landfill; compost picked up weekly; yard debris picked up seasonally)
- Integrate metered service with Solid Waste Fees as part of rollout of universal recycling and composting collection services
- Implement bundled rates with the rollout of universal recycling and composting collection services (one payment for garbage, recycling and composting collection as the Solid Waste Assessment; if more services wanted, residents may pay for more services)

Additional Program Components:

- Once a month (OAM), quarterly, or on-demand curbside pick up of bulky items. Establish a system to reuse or recycle those products/materials.

Universal Residential Curbside Collection is an ongoing program.

Education and Outreach Mechanisms

Proposed Education and Outreach:
Strong, effective diversion collection programs rely upon the delivery of strong, effective outreach and education programs. Roll-out of Universal Residential Curbside Collection will require significant education and outreach to customers serviced by the program before program startup, during startup, and on an on-going basis. A robust, multi-channel education and outreach effort prior to program launch will be necessary to ensure that customers understand the new program and how it works. Outreach channels can include online (website, social media), events, door-to-door, and print media (e.g., signage, ads, billboards) with clear and consistent messaging and branding that is as simple as possible. Ongoing engagement and technical assistance will be required to ensure the customer base remains educated as new residents move to the City of Helena or as the program evolves.

Metrics

2.6 – Universal Residential Curbside Collection	Phase 2 (2025-30)
Diversion Potential (Tons)	5,440
GHG Emissions Reduction Potential (MTCO2e)	6,940
One-time Costs $	11,200
Annual Costs $	2,174,000[4]

Initiative Potential Impact

Potential Impact:
The findings of the Recycling Partnership's (TRP) 2020 State of Curbside Recycling Report determined that requiring households to opt-in to recycling programs is a detriment to material capture and diversion. The report states that "more than 16.5 million U.S. households with opportunities to subscribe to curbside services fail to do so, in part due to cost barriers." The TRP report suggests that conversion of opt-in and subscription programs, such as currently available in Helena, to universal curbside service would increase diversion.

Implementation Timeframe

Short – Phase 1 (planning & development) – 2022-2024
Medium – Phase 2 (implementation) – 2025-2030

[4] The annual cost of Universal Residential Curbside Collection assumes a public-run program with weekly trash, weekly organics (8 months/yr), and every-other-week single-stream recycling. It also includes collection container costs amortized over 8 years. For alternative recycling approaches see the Residential Recycling Collection System Report.

Initiative: 2.7 – Self-Haul Diversion Options
Initiative Type: Infrastructure
Hierarchy Level: Reuse/Recycle/Compost

Initiative Background and Essential Information

Background:
Generators from multifamily, commercial, self-haul, and construction and demolition (C&D) projects are responsible for 70% of landfill disposal. Facilities currently serving these sectors include the City of Helena Transfer Station and the shared City/County drop-off sites. Self-haul from City of Helena residents to the Transfer Station accounts for 10% of the total citywide landfill disposal. While the composition of that substream is unknown, waste composition studies from other communities suggest potentially divertable materials include clean dimensional lumber, new painted wood, furniture, clean engineered wood, carpet, mixed metals, mattresses, and other construction materials as well as paper, plastic, glass, and compostable organics.[1] Improving diversion opportunities at the Transfer Station for those reusable, recyclable, and compostable materials as well as hard-to-recycle materials will help the community achieve its waste reduction goal.

Local and Regional Examples:
The Washington County Solid Waste (WCSW) program in **Washington County, UT** (population 180,279) provides numerous and varied opportunities for residents to divert materials from landfill disposal. In an effort to increase access to composting for residents, WCSW accepts yard debris at no charge at the landfill, the Central Transfer Station, and the Reuse Center. Composting takes place at the landfill and finished compost is sold back to the community. Additionally, the diversion programs at the landfill and transfer stations include electronics recycling, tire recycling, appliance and bulky item drop-off, car and rechargeable battery drop-off, green waste and tree limbs, residential used oil and antifreeze collection, and a paint exchange program. Finally, the "binnie" program is a network of 35 public drop-off sites across the County where glass, paper, plastic, and metal are accepted.

The Pitkin County Solid Waste Center at the Pitkin County Landfill in **Pitkin County, CO** (population 17,767) hosts a "Drop and Swap" site to accept items for reuse that are in good condition such as furniture (no upholstery), exercise equipment & skis, office furniture, and lawn furniture. They do not accept broken or outdated items and it is up to the discretion of the scale house to determine if items are suitable for the area.

Boulder, CO (population 108,250) is home to Recycle Row at the center of which is EcoCycle Center for Hard to Recycle Materials (CHaRM), a non-profit self-haul diversion facility. This mostly outdoor facility includes a 6,000 sq foot warehouse for processing of certain materials including electronics and expanded polystyrene. There is a $3 fee for each vehicle and some items have an additional charge for drop-off. The CHaRM facility accepts traditional recyclables and compostables and is co-located with Resource Central, a **non-profit building materials reuse center** operated by a separate organization. Resource Central is similar to Home ReSource in Missoula, MT.

National Examples:
In **Emporia, KS** (population 24,343) residents of multi-family buildings and out-of-city

[1] Seattle Public Utilities 2017/18 Self-haul Waste Stream Composition Study - accessed 4/1/22

residents have free access to the Transfer Station Recycling Center, which is open seven days a week and offers single-stream recycling drop-off. The City of Emporia's recycling efforts began in 1989 and over 2,000 tons of recyclable materials are accepted and processed annually at the center.

The Residents' Convenience Center in **Howard County, MD** (population 332,317) accepts unlimited recyclables from residents and small businesses. Proof of residency is required. In addition to single-stream recycling, the Convenience Center also provides drop-offs for hard-to-recycle materials like electronics, mattresses, cooking oil, hazardous waste, and food scraps.

Operated by the Rutland County Solid Waste District, The Recycling Center in **Rutland County, VT** (population 58,191) allows residents to pay for trash drop-off by the bag and to drop off their recyclables for free with a valid RCSWD permit. The recyclables include glass, newspaper, boxboard, cardboard, tin & aluminum, mixed fiber and plastics #1, #2 & #5. Across from the recycling center, the District also provides segregated areas where residents can drop off e-waste, textiles/clothing, tires, refrigerators, and air conditioners.

Initiative Proposed Action

Proposed Action:
To provide sufficient waste reduction options for multifamily, commercial, self-haul, and construction and demolition (C&D) project generators, the City will implement the following infrastructure enhancements.

- **Transfer Station**
  - Expand accepted materials to include more types of plastics and other materials as regional markets allow.
  - Incentivize yard debris diversion and recycling (e.g., by including recycling with Solid Waste Assessment prepayment option)
  - Expand upon the Queen City Wheel House bicycle reuse program to partner with other reuse organizations for other types of usable products.
  - Revisit "Drop and Swap" program and research best practices.
  - Provide surplus reusable materials to the community, (such as wood, supplies, and fixtures) collaborating with existing nonprofits (e.g. Habitat for Humanity ReStore).
  - Explore with the Chamber of Commerce, small businesses, and nonprofit organizations if there are additional services desired that would make it easier for them to reuse, recycle, or compost at the Transfer Station.
- **Drop-off Sites**
  - Add additional recycling drop-off stations for residents and businesses.
  - Expand the list of acceptable materials as regional markets allow.

Initial improvements and expansion of enhanced self-haul diversion options would require significant effort to plan and implement during Phase 1. After implementation in Phase 2, they would remain an ongoing program.

Education and Outreach Mechanisms

Proposed Education and Outreach:
Education and outreach will be required to support the promotion of expanded diversion options at the Transfer Station as well as at any additional sites. The multi-channel approach to this will be similar to that of other initiatives (online, events, door-to-door, print) and will require ongoing support to ensure the success of self-haul diversion programs. As brick-and-mortar facilities that support the City of Helena waste reduction goal exist, additional opportunities are available for enhanced visual components, such as information and interpretive signage, that can both educate and inform the public as to the programs, their importance, and their community benefits and impact. The Transfer Station website could also serve as an information hub for customers interested in finding out about more reuse, recycling, and composting services available in the area.

Metrics

2.7 – Self-Haul Diversion Options	Phase 2 (2025-30)
Diversion Potential (Tons)	1,280
GHG Emissions Reduction Potential (MTCO2e)	1,800
One-time Costs $	130,900
Annual Costs $	142,900

Initiative Potential Impact

Potential Impact:
Self-haul is a strong aspect of Helena's recycling culture. Be Heard Helena survey responses suggest that expanded self-haul diversion options will be well received and utilized by the community.

Implementation Timeframe

Short – Phase 1 (planning & development) – 2022-2024
Medium – Phase 2 (implementation) – 2025-2030

Appendix C – Impact Analysis Methodology

Overview

A diversion potential and greenhouse gas (GHG) emissions reduction analysis was conducted to estimate the possible tons of landfill materials and GHG emissions that can be diverted and reduced through the chosen initiatives. The City of Helena and Tri County Disposal/Valley View Landfill provided landfill tonnage data used in this analysis. This analysis required the landfill data to be divided into material types based on a material characterization study. The material characterization data used in this analysis were from Cascadia Consulting's Baseline Waste Composition Study for the City of Missoula.[1]

The Baseline Waste Composition Study is a material composition report characterizing Missoula, Montana's discarded material stream. In developing the study for Missoula, Cascadia relied on comparable data from similar communities across the region. This regional analysis provides a good approximation of landfill disposal composition for Helena.

Along with landfill tonnage data and material characterization data, GHG emission factors by material type were used in this analysis. The emissions factors used in this analysis were from the US EPA Waste Reduction Model (WARM) tool and the national average emission estimates were utilized.[2] Two GHG emission factor categories were used: source reduction and recycling/composting. For each ton of material type, WARM has identified the metric ton of carbon dioxide equivalent (MTCO2e) either reduced or produced depending on the management pathway (i.e., source reduction, recycling, landfill, composting, anaerobic digestion, or combustion). The GHG emission factors used in this analysis are a combination of the MTCO2e reduced from either source reduction, recycling, or composting 1 ton of that material plus the emissions associated with landfilling 1 ton of that material.

The emissions associated with landfilling materials were used to estimate the full benefits of changing the management pathway from landfilling to either source reduction, recycling, or composting. The US EPA estimated landfill GHG emissions for each material type in WARM based on the methane produced during anaerobic decomposition in landfills, transportation emissions and emissions from landfill equipment use, carbon stored in the landfill, and avoided emissions through landfill from energy recovery.[3] [4] The emissions from landfilling some material types occur from only transportation and landfill equipment use (e.g., glass, metal, plastic, tires, asphalt, concrete, aggregate, electronics, textiles, and carpet). Other material types, such as paper products, food, yard debris, and wood, incorporated the emissions from anaerobic decomposition, transportation, carbon storage, and avoided emissions from energy recovery to estimate their landfill emission factors.[5] These factors used to estimate landfill emissions resulted in some material types being carbon sinks (e.g., some paper material types, yard debris, some construction material types, and wood) and do not produce emissions when landfilled. For the material types that create emissions when landfilled, their emissions are a small portion of this analysis.

The initiative and material type dictated which GHG emissions factor was used (i.e., source reduction or recycling/composting). The more conservative GHG emissions factor was used if there was any uncertainty. The recycling and composting emission factors were used more frequently than the source reduction emission factors. When there was a material type without a

[1] Baseline Waste Composition Study, Presented to Missoula, Montana
[2] US EPA Waste Reduction Model (WARM) – version 15
[3] Documentation for Greenhouse Gas Emission and Energy Factors Used in the Waste Reduction Model (WARM) Background Chapters
[4] Documentation for Greenhouse Gas Emission and Energy Factors Used in the Waste Reduction Model (WARM) Management Practices Chapters
[5] Documentation Chapters for Greenhouse Gas Emission, Energy and Economic Factors Used in the Waste Reduction Model (WARM)

directly related emission factor (there are 60 factors in WARM), appropriate proxies were used in their place.[6] In this analysis, the carpet emission factor was used as a proxy for textiles, the dimensional lumber factor was used as a proxy for bulky items, and the mixed plastic factor was used as a proxy for other recyclable plastics, shopping bags, other film, and non-recoverable plastics. When analyzing compostable paper, the source reduction newsprint factor was used and the food scraps composting factor was used.

Each initiative was analyzed to estimate the diversion potential (tons) and the reduced GHG emissions (metric ton carbon dioxide equivalent – MTCO2e). This analysis begins by estimating the capture rate for each material type for an initiative. The capture rate estimation was based on knowledge from other community initiative implementations, published reports, or best estimates and leaned on the side of a conservative estimate. The estimated capture rate for each material type corresponding to the initiative was multiplied by the GHG emission factor (source reduction or recycling/composting). This estimated the GHG emissions that were reduced by the initiative. This method was repeated for each material category that related to the initiative.

For each initiative, the tons estimated to be diverted by material type were added up to show the total tons estimated to be reduced for that initiative; and the GHG emissions estimated to be reduced by material type were added up to show the total MTCO2e reduced for that initiative. Next, each initiative's capture rates were calculated by dividing the total tons estimated to be diverted by the total tons going to the landfill.

The last step in this analysis combined the total capture rate, total estimated tons diverted, and total estimated GHG emissions reduced among initiatives. These data showed the potential diversion and potential GHG emission reduced per year once all initiatives are in place.

[6] Using WARM Emissions Factors for Materials and Pathways not in WARM

Appendix D – Community Partner Initiatives

Top Waste Reduction Strategies for the City of Helena
Community Partner Initiatives

April 11, 2022

Phase I - Education & Incentives (Implementation Timeframe: 2022 onward)

1. **Community Education** - *Reduce/Reuse/Recycle/Compost*
    a. Partner on outreach: partner with an existing nonprofit or community group that focuses on sustainability or waste reduction and have that group generate some of the education and help conduct the outreach. This partnership will help spread the message of waste reduction and speed up the dissemination of materials that is needed to create culture change. If no nonprofit exists, then the City of Helena could help create this group.
    b. Support implementation/development of k12 curriculum: Helena specific waste reduction curriculum should be created to educate k-12 students on the programs and opportunities in the communities to reduce sending discarded materials to the landfill. These grade-appropriate lessons can be utilized by local teachers.
2. **Community Incentives** - *Reduce/Reuse/Recycle/Compost*
    a. Support development of Institutional Recognition Program: a waste reduction recognition program could be created for k-12 schools and other local institutions. For the k-12 schools there could be friendly competitions related to reusing materials or recycling efforts. The students could be involved by collecting toner and ink cartridges for the FundingFactory program or another similar program.[1] There could also be recognition for the use of any waste reduction education in the classroom. Having waste reduction initiatives across sectors in a community that is working towards a goal of 50% reduction in discarded materials going to the landfill is essential. It is also a great initiative to have the same education, programs, and goals across the residential, business, and institutional arena.
3. **Community Reuse Support** - *Reuse*
    a. Partner with local reuse stores: create a system to capture bulky and reusable materials from single-family and multifamily residents in Helena. This program could be a one-time a year event where residents place bulky items at the curb for pick up by partner organizations that will then sell the items in their store. This system could be conducted several times a year or as an on-demand program in partnership with local reuse businesses such as Good Samaritan and/or Goodwill.
    b. Organize Fixit Clinics or Repair Cafés: These events will repair and prolong the life of the items and are an amazing way to bring the community together.

[1] http://www.fundingfactory.com/

Appendix E – Legislative Diversion Actions

Overview

Legislative action can be a very effective lever for increasing diversion. Legislative action can be taken at the national, state, and local levels.

National Action

One current example of national legislation is a proposal to implement a standardized beverage container deposit system for the country.[1] Known as a bottle bill, this type of legislation has been on the books in ten states since the 1970s. Across those deposit states, redeemed containers account for 93% of the national beverage container recycling rate.[2] Recycling industry advocates express hope when they report that the current draft bottle bill legislation is the closest this country has ever come to a national container deposit system.

Another example of national legislation is the Agriculture Right to Repair Act introduced in February 2022 by Montana Senator Jon Tester.[3] Farm industry advocates express frustration at the increasing complexity of farm equipment and the loss of agency to repair equipment when on-board computer systems fail. This bill is part of a broader "right to repair" movement that aims to give every consumer and small business access to the parts, tools, and service information they need to repair products to keep them in use and reduce waste.

Both national bills, if passed, could increase diversion in the Helena area and benefit the community as well as bolster the City's diversion rate.

State Action

One state law of particular note is HB 407, which passed in 2021. HB 407 established a statewide uniformity for auxiliary container regulations and is notable in that it impedes waste reduction in Montana communities. Commonly referred to as a pre-emption law or a "ban on bans," HB 407 restricts local jurisdictions in Montana from banning or limiting the distribution of auxiliary containers defined by the law as "a bag, cup, bottle, can, device, eating or drinking utensil or tool, or other packaging, whether reusable or single use" made of "cloth, paper, plastic, including foamed or expanded plastic, cardboard, corrugated material, aluminum, glass, post consumer recycled material, or similar material or substrates, including coated, laminated, or multilayer substrates."[4] The City of Helena must understand the implications of HB 407 in terms of how it may impede the City's progress toward its waste reduction goals. Comments in support of HB 407 from Montana retailers indicated a concern that, without a pre-emption law, rules would vary from jurisdiction to jurisdiction making compliance difficult particularly for Montana-owned small and mid-size businesses with locations across the state.

A possible solution to HB 407 is to repeal it and replace it with statewide product policies. One strategy being promoted by Helena-based MontPIRG is a ban on problematic plastic such as polystyrene, straws, and shopping bags, which are materials HB 407 essentially protects.[5] Montana has a statewide product policy that imposes restrictions on the disposal of mercury thermostats. A statewide plastics ban would support the City of Helena and other Montana cities

[1] https://resource-recycling.com/recycling/2022/02/08/national-bottle-bill-likely-to-land-in-congress-soon/
[2] https://www.sierraclub.org/sites/www.sierraclub.org/files/Sierra-Club-Beverage-Container-Guidance.pdf
[3] https://www.thefencepost.com/news/right-to-repair-farm-equipment-and-empowering-family-farmers-is-aim-of-testers-new-legislation/
[4] https://legiscan.com/MT/bill/HB407/2021
[5] https://montpirg.org/feature/mtp/beyond-plastic

with waste reduction goals. Colorado recently passed such legislation along with a repeal of a law similar to HB 407.

Montana could become the 11th state in the country to adopt its own statewide bottle bill. The Container Recycling Institute is closely monitoring and supporting similar efforts throughout the country, and is working with several states to adopt new bottle bills.[6] There has been increasing interest and support of such efforts from industry that historically opposed such bills. The new support from industry is due to commitments made to use more recycled content in plastic products and the recognition that bottle bills get more clean material to help industry fulfill those commitments. Those commitments are being made largely in response to concerns raised about the polluting of the environment and impacts on wildlife resulting from the lack of infrastructure for the recycling of plastic.

Local Action

Local legislative diversion actions can be taken by a county or by a city. Actions can include product policies, disposal bans, diversion service requirements for haulers, and diversion requirements for residents and businesses. Sector-specific actions can also be taken. For example, to reduce waste and promote reuse in the building sector, deconstruction prior to demolition can be required.

Product policies can be adopted at the county and city levels that are not covered by HB 407. A local product policy being adopted in local jurisdictions across the country is called #skipthestuff. It is an ordinance that requires take-out food service establishments to only provide accessories such as utensils, straws, condiment packets, and napkins upon customer request. This actually helps businesses save money by not having to buy so much stuff to provide to customers that customers just throw away because they didn't need them. Based on #skipthestuff, the City of Denver's Single-Use Accessory Restriction Ordinance went into effect January 2022.[7]

A significant local legislative diversion action for Lewis and Clark County would be to ban disposal of certain materials, like recyclables and compostable organics, at landfills within the County. The County could require trash haulers to provide equal volume of recycling, composting, and trash services to all trash customers. The County could also require residents and businesses to separate recyclable and compostable organics from trash prior to collection or disposal. Such "generator" requirements can also target specific sectors such as the building sector, which typically generates significant amounts of reusable, recyclable, and compostable construction and demolition debris.

The Phase 3 waste reduction initiatives described earlier in this plan include new rules such as those described above. They are:

- **Hauler Equal Volume Diversion Ordinance** - All haulers providing garbage collection services to residents (single family & multi-family), businesses, or institutions in the City of Helena also provide recycling and composting services in equal or greater quantities to the garbage services.

[6] https://www.container-recycling.org/

[7] https://denvergov.org/Government/Agencies-Departments-Offices/Agencies-Departments-Offices-Directory/Climate-Action-Sustainability-Resiliency/Zero-Waste/Skip-The-Stuff

- **Community Recycling Ordinance** - All residents (single family & multi-family), businesses, and institutions in the city separate recyclables and compostables from garbage and separate garbage from recyclables and compostables.
- **Construction, Deconstruction & Demolition Ordinance** - All construction and development projects divert 50% of all discarded materials.

Finally, as has been pioneered in Broomfield, CO, the City of Helena could adopt an Equal Space ordinance to require new property developers to provide adequate space for the collection and storage of refuse and recyclable materials.[8] This type of ordinance would ensure that new construction is helping prepare Helena to meet its waste diversion goal.

Legislative Diversion Action	National	State	Local
Bottle Bill	X	X	
Farm Equipment Right to Repair	X	X	
Repeal HB 407 & Replace with Statewide Product Policies		X	
#skipthestuff Ordinance			X
Disposal Bans at County Landfills			X
Hauler Equal Volume Diversion Ordinance			X
Community Recycling Ordinance			X
Construction, Deconstruction & Demolition Ordinance			X
Equal Space Ordinance			X

[8] https://www.ecocyclesolutionshub.org/making-room-for-recycling/

Appendix F – Community Outreach and Engagement

Community outreach and engagement during the development of the City of Helena Strategic Plan for Waste Reduction included four components: stakeholder interviews, community events, presentations, and online engagement. Each component is described below.

1. Stakeholder Interviews

Zero Waste Associates and members of the planning team interviewed the following stakeholders to solicit input on the development of the Strategic Plan.

Local and Regional Reuse, Recycling, & Composting Infrastructure:

Pete Anderson	Landfill Manager	Lewis & Clark County Landfill
Kim Carley	Recycling Program Coordinator	City of Helena Transfer Station
Rick Farrow	Helena Manager	Pacific-Steel & Recycling
Lauri Barrie	Store Manager	Goodwill
Theresa Ortega	Executive Director	Good Samaritan
Kimberly Dale	Program Operations Director	Helena Food Share
Jeff Kurtz	Manager	Helena Habitat for Humanity Restore
Jeff Kuhn	Shop Manager	Queen City Wheel House

Private Collection Service Providers:

John Hilton	Owner	Helena Recycling
Matt Elsaesser	Owner	406 Recycling and 406 Compost
Brooke Jenkinson	Marketing & Operations	Better Roots Compost
Chance Sparrow	Project Manager	Better Roots CompostinG
Chance Sparrow	Manager	Tri County Disposal/Valley View Landfill
Lance Johnson	Owner	L&L Site Services (Belgrade)

Large Employers:

Debbie Friedel	Director of Sustainability	Delaware North (Bozeman)

The following individuals work for the State of Montana Department of Administration:

- Steve Baiamonte — General Services Division Administrator/Security Director
- Josh LaFromboise — Facilities Bureau Chief
- Meghan Holmlund — Chief Procurement Officer

Public Agencies:

Michael O'Neil	Executive Director	Helena Housing Authority
Liz Mogstad	Affordable Housing Director	Rocky Mountain Development Council
Kathy Marks	Operations Director	Rocky Mountain Development Council
Micky Zurcher	Executive Director	Helena Business Improvement District

Educational Institutions:

Walter “Butch” Biskupiak	Director of Facilities & Grounds	Carroll College
Kelly Parsley	Chair, Health Sciences Department	Carroll College

2. Community Events

Zero Waste Associates and the City of Helena hosted two 1.5-hour virtual community events via Zoom in February and March 2022.

Community Event #1: Project Kick-off – February 17, 2022 – 77 attendees

At the Project Kick-off online event, attendees received a briefing on the planning process and the results of a Helena waste assessment. Facilitated group discussions to identify ideas for potential waste reduction strategies followed. The input received is summarized and categorized below:

Education & Incentives

- Without education these initiatives will struggle to gain momentum
- Simple messages on a whole host of topics
- Skip the stuff - Upstream
- Event plan for Zero Waste
- Re-use of materials – bringing your own containers when shopping, providing;a way to give away items before they are landfilled; deconstructing things to preserve useful parts; fixing things rather than discarding.
- Contractor education and incentives – for unused construction items
- Pay as you Throw
- Green Business Directory
- Incentives for businesses to switch to low-impact packaging
- Incentives for recycling versus trash
- Incentives for buying local
- Restructuring fees/taxes assessed for waste collection/diversion. Needs to be equitable across city/county and not squeeze out private enterprise
- Encourage the switching from plastic single use items to compostable materials

New Services & Infrastructure

- Universal recycling & composting with same day collection of all waste for convenience
- Shared containers in commercial areas
- Composting organics
- Drop and Swap
- Transfer station to expand to collect more types of plastics, materials, and provide education on that too
- Recycling bins next to trash bins downtown
- Recycling services at events
- Offer easier cardboard recycling for businesses. 1 cardboard recycling location per block and emptied multiple times a week. Offer a plastic recycling option for businesses
- More recycling locations throughout town, not just at the transfer station for individuals that live in apartments and don't have access to the transfer station
- Annual/Semi-Annual/Quarterly mass recycling event

New Policies

- State Bottle Bill
- Repeal pre-emption law

- City Commission Ban plastic bags and Styrofoam
- Adopt ordinance on Truth in Recycling Labeling
- Vendor requirements, guidelines

Community Partnerships

- Edible food capture
- City reuse day
- Fix it shop
- Work with Helena ReStore
- Work with schools to reduce their waste stream
- Focus heavily on largest producers of waste in the community

Recognized Challenges

- Who does the educating?
- Waste diversion in multi-family communities
- Need universal support for all commissioners
- Strategizing getting those who aren't environmentally conscious on board

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Community Event #1: Project Kick-off – Follow-up

Zero Waste Associates developed a *Summary of Top Waste Reduction Strategies for the City of Helena* based upon an initial planning exercise completed by the members of the Helena planning team and community input from the February community event. The City posted the following summary to the Be Heard Helena page for review by the public in advance of the second community event.

Top Waste Reduction Strategies for the City of Helena

Draft - March 9, 2022

<u>Phase 1 - Education & Incentives (Implementation Timeframe: 2022 onward)</u>

1. **Community Education** - *Reduce/Reuse/Recycle/Compost*
    a. Promote strategies and provide technical assistance for waste reduction, reuse, and food donation to all single family and multi-family residents, businesses (commercial and industrial), institutions (schools, hospitals, correctional facilities), and government agencies (local and state).
    b. Promote and educate about existing diversion options including Transfer Station, Subscription-based collection services for recycling & composting, and reuse
    c. Educate online (website, social media), at outreach events, door-to-door, and print media (e.g., signage, ads, billboards) with clear and consistent messaging and branding as simple as possible.
    d. Work with schools to include waste reduction in curriculum. Create Helena-specific and grade-appropriate lessons for teachers to utilize if they want.
2. **Community Incentives -** *Reduce/Reuse/Recycle/Compost*
    a. Implement a Business Recognition Program.
    b. Design incentives to recycle and compost.

3. **Community Reuse Support** - *Reuse*
    a. Partner with local thrifts to collect usable bulky goods curbside.
    b. Initiate repair cafe and/or fixit clinic events.
    c. Coordinate citywide garage sale and/or giveaway events.
    d. Help Carroll College set up reuse and recycling for Move-Outs and Move-Ins.
4. **Lead by Example** - *Reduce/Reuse/Recycle/Compost*
    a. Public Facilities
    b. Greening Events Policy
    c. Support statewide legislation in support of waste reduction

Phase 2: New Services & Infrastructure (Implementation Timeframe: 2025-2030)

5. **Recycling & Composting Infrastructure** - *Recycle/Compost*
    a. Arrange for sufficient organics and recycling processing capacity to manage all materials from curbside collection of residential materials in the City.
6. **Universal Residential Curbside Collection** - *Reuse/Recycle/Compost*
    a. Three streams: Recycle, Compost, Garbage
    b. Same-day-of-week collection.
    c. Set up a system for curbside collection and reuse of bulky items.
7. **Self-Haul Diversion Options** - *Reuse/Recycle/Compost*
    a. Transfer Station
        i. Expand accepted materials to include more types of plastics and other materials as regional markets allow.
        ii. Incentivize yard debris diversion and recycling (e.g., by including recycling with Solid Waste Assessment prepayment options)
        iii. Expand upon the Queen City Wheelhouse bicycle reuse program to partner with other reuse organizations for other types of usable products.
        iv. Revisit “Drop and Swap” program and research best practices.
        v. Provide surplus reusable materials to the community, (such as wood, supplies, and fixtures) collaborating with existing nonprofits (e.g. Habitat for Humanity ReStore).
    b. Drop-off Sites
        i. Add recycling drop-off stations for residents and businesses.
        ii. Expand the list of acceptable materials as regional markets allow.

Phase 3: New Rules (Implementation Timeframe: 2031-2040)

If 2030 target of 35% diversion is not met, at that time policies could be evaluated and recommended to the City Commission to adopt such as the following:

8. **Hauler Recycling & Composting Services Ordinance** - *Recycle/Compost*
    a. All haulers providing garbage collection services to residents (single family & multi-family), businesses, or institutions in the City of Helena also provide recycling and composting services in equal or greater quantities to the garbage services.
9. **Community Recycling Ordinance** - *Recycle/Compost*
    a. All residents (single family & multi-family), businesses, and institutions in the city separate recyclables and compostables from garbage and separate garbage from recyclables and compostables.
10. **Construction, Deconstruction & Demolition (CD&D) Ordinance** - *Reuse/Recycle/Compost*

a. All construction and development projects divert 50%of all discarded materials.

Community Event #2: Proposed Strategies – March 16, 2022 – 31 attendees

At the Proposed Strategies online event, attendees had the opportunity to respond to the *Summary of Top Waste Reduction Strategies for the City of Helena*, which was provided to them in advance of the event. Zero Waste Associates provided a detailed explanation of the 10 proposed strategies. Facilitated group discussions to further refine the strategies and provide an opportunity for additional ideas followed. The following are key ideas from the Proposed Strategies online event organized by phase and initiative.

<u>Phase 1 - Education & Incentives (Implementation Timeframe: 2022 onward)</u>

- **Community Education**
  - Prioritize upstream (reduce & reuse)
  - Focus on behavior change
    - In education, convey message that some recyclable items can't make money by recycling, so we must focus on changing behavior, like not buying stuff in low market value containers. We're consuming more than is sustainable (need to reduce consumption).
  - Explain why through outreach and education; how to motivate people? $, climate, future? How does this fit in with climate change, sustainability, and conservation?
  - Some materials may never be able to "make money" or "break even". Not just a cost/benefit analysis that's needed. Need to highlight other values and benefits, like not landfilling. If we don't start accelerating diversion, where is the next landfill going to go (particularly given the city is growing)? Consider the overall program costs, not what each material or product costs to recycle.
  - Include a message that this is all about being more efficient with what we buy, use and discard. Also, giving them a second life for reusables, recycling and composting.
  - Skip the Stuff education for individuals
  - Collective list of all the options residents can use, all the options that are available with maps
    - Reuse and repair options
    - Workshops
  - Promote local/regional examples, e.g. Bayern Brewing in Missoula
  - Cradle to cradle analysis of environmental impacts of materials use - not just cost/benefit analysis.
  - Educate that landfill is not infinite and is a valuable commodity. The longer it lasts, the better.
- **Community Incentives**
  - Expand renter permit to allow buy-in or punch cards that allow use by renters in larger facilities
  - Waste challenge - putting a challenge out to the residents to try different diversion techniques; education on the basic steps and then build the challenges around those basic steps

    - Skip the Stuff as a business recognition program
    - Incentives for people to use fewer plastic bags at grocery stores (produce bags) and to bring your own bag
    - Consider demand management by making free at less busy times at the transfer station
    - Switching the current solid waste regime from a simple assessment (tonnage on permit/weekly collection or 90-gallon bin) to a point system could allow for recognizing reduction and incentivizing beneficial diversion. For example, households could have an option for a smaller bin, choose to use a nearby community (300 gallons) bin, or alternative week collection. These points could then go to cover the cost to pay a thrift store to collect an item for reuse, go towards the cost of curbside service as is done with recycling now, and for more expensive items like household hazardous waste.
    - Solid Waste Assessment as incentive: it could be decreasing the amount of the allocation for waste and increasing the amount for reuse, recyclables and compostables
    - Property taxes (Solid Waste Assessment) should pay for diversion programs; what goes to landfill should be an additional cost on top of that
    - Incentivize contractors
        - Structure pricing for different materials at the transfer station (e.g. lower fees for source separated and/or "clean" streams; higher fees for mixed waste)
        - Incentivize LEED[1] construction which includes a host of green provisions including energy savings, community infrastructure, and reuse and beneficial diversion of material (like separating old bricks or directing concrete to recycle). This is through a point system that makes for an overall rating and recognizes the builder/business. The City could do this through a zoning overlay or other policy that allows additional development rights for meeting LEED measures. *[this is legal authority held by local governments if incentive based]*
        - To get a building permit would have to divert
- **Community Reuse Support**
    - Engage community members in the service of collecting unused food from restaurants and stores and redistributing to food banks, shelters, etc. where food can be used
- **Lead by Example**
    - Commission resolution to support statewide or federal bottle bill
    - Commission resolution to repeal HB407 (Establish a statewide uniformity for auxiliary container regulations), which prevents local governments from banning problematic materials such as plastic bags, straws, and expanded polystyrene (foam) containers.[2]

<u>Phase 2: New Services & Infrastructure (Implementation Timeframe: 2025-2030)</u>

- **Universal Residential Curbside Collection**

[1] Leadership in Energy and Environmental Design is a design standard developed by the U.S. Green Building Council
[2] https://legiscan.com/MT/bill/HB407/2021

    - Expand materials collected curbside to include hard-to-recycle items
        - Scrap metal
        - Used motor oil
    - Include commercial and multi-family
- **Self-Haul Diversion Options**
    - New drop-off services at or near transfer station
    - Before moving to regulatory approaches, there could be more ways to offer reuse, recycling and composting services, in collaboration with existing businesses (e.g. ReStore).

<u>Phase 3: New Rules (Implementation Timeframe: 2031-2040)</u>

- Redefine the trigger for Phase 3 to be achieving 50%- the 2030 assessment triggers considering new rules unless City has already hit the 50% goal[3]

[3] The Phase 3 "trigger" was further refined based on input from members of the planning team.

3. Presentations

Zero Waste Associates gave five virtual slideshow presentations about the project to community groups and public agency bodies. In some cases, Q&A sessions followed. The presentations are summarized below:

Helena Citizen Conservation Board Monthly Meeting – January 13, 2022 – 8 attendees
Zero Waste Associates provided an overview of the strategic planning process and opportunities to engage in it. In the discussion that followed, topics that arose included County landfill revenue impacts of increased diversion, sustainable food choices in terms of health and nutrition, supporting local food, and plant-based diets, plastics, curbside recycling approaches, and the role of reuse and repair in Helena's diversion efforts.

Hometown Helena Monthly Meeting – February 10, 2022 – approximately 60 attendees
Zero Waste Associates provided an overview of the strategic planning process and opportunities to engage in it.

Downtown Helena Inc General Membership Meeting – February 16, 2022 – 20 attendees
Zero Waste Associates provided an overview of the strategic planning process and opportunities to engage in it. In the discussion that followed, topics that arose included the lack of composting and recycling in the downtown area and space constraints regarding additional bins for composting and recycling. Specific comments included restaurants currently all share one grease trap in the downtown area and 10 Mile Creek Brewery reduces waste by sending spent grain to animal feed and hosting a pumpkin smash event each fall. The general consensus from attendees was that there is "a lot of room for improvement."

Helena BID Trustees Monthly Meeting – March 8, 2022 – 8 attendees
Zero Waste Associates provided an overview of the strategic planning process and opportunities to engage in it. In the discussion that followed, topics that arose included the challenges and successes of recycling in multi-family residential buildings in Helena, the amount of cardboard generated by businesses and the need for more cardboard recycling bins, space constraints for more bins, and the need for education. Also discussed was the idea that the BID could become an independent solid waste district that could contract for waste and recycling services on behalf of the entire district. Attendees provided no response when asked what diversion incentives they would like to see. When asked about attitudes regarding diversion requirements, one trustee replied saying "I think we would all do it voluntarily if the bins were available."

City/County Parks Board Monthly Meeting – April 6, 2022 – 16 attendees
Zero Waste Associates provided an overview of the strategic planning process and provided information on how similar bodies in other communities have supported waste diversion in public parks.

4. Online Engagement

A Strategic Plan for Waste Reduction project page on the Be Heard Helena website provided an opportunity for community members to complete a survey as well as to share waste reduction ideas and stories. The complete Be Heard Helena page public input report can be downloaded at: https://beheardhelena.com/strategic-plan-waste-reduction

Be Heard Helena Page Summary

Between January 21 and May 9 2022, the Strategic Plan for Waste Reduction project page had a total of 1.2k visits. The page brought 27 new registered users into the Be Heard Helena platform.

Aware Participants	833
Aware Actions Performed	Participants
Visited a Project or Tool Page	833
Informed Participants	**521**
Informed Actions Performed	Participants
Downloaded a document	133
Visited Multiple Project Pages	198
Contributed to a tool (engaged)	250

Engaged Participants	250		
Engaged Actions Performed	Registered	Unverified	Anonymous
Participated in Surveys	49	176	0
Contributed to Stories	1	1	0
Contributed to Ideas	5	16	10

Be Heard Helena Survey Summaries

A total of 225 respondents completed 238 surveys. Residents of the City of Helena had the option to take a Residential Survey. People who worked in the City of Helena had the option to take a Business/Institution survey. People who worked and lived in the City had the option to take both surveys. 221 respondents completed the Residential survey. 17 respondents completed the Business/Institution survey.

Residential Survey Highlights

Topic: Recycling

- "Would you be interested in recycling or recycling more if the City could help you resolve your obstacles?"
    - 90% of respondents responded "Yes"
- The most common obstacles to recycling selected by respondents were:
    - It costs extra to have it collected and I can't afford or don't want to pay for that – 19 respondents
    - I don't have room in my home to separate and store recyclables – 18 respondents
    - I think it all ends up in the landfill anyway – 13 respondents
    - It's too confusing (what can and cannot be recycled, how to handle the materials before recycling them, etc.) – 13 respondents
    - I don't know enough about my options – 11 respondents
- Most common comment topics were:
    - Provide universal curbside recycling collection – many respondents specifically requested single-stream
    - Provide universal curbside compost collection
    - Provide more education on what is recyclable
    - Increase the types of materials that can be recycled in Helena
        - Recycle more types of plastics was the most common comment
        - Many respondents requested paperboard be included in recyclables
    - Expanded collection of plastic #1 & #2 and glass at the drop-off sites
- When asked directly, 180 respondents indicated that they wanted "Universal curbside recycling collection for all residents"

Topic: Composting

- "Would you be interested in food scraps composting if the City could help you resolve your obstacles?"
    - 50% of respondents responded "Yes - I would like a collection service to pick up my food scraps for composting elsewhere"
    - 26% of respondents responded "Yes - I would like to learn how to compost food scraps at home"
- The most common obstacles to composting selected by respondents were:
    - I didn't know there were food scraps collection services available in Helena – 13 respondents – 53 respondents
    - I don't have outdoor space to compost food scraps at home – 40 respondents
    - I don't know enough about composting – 31 respondents
    - I'm concerned I don't have enough room in my home to separate and store food scraps – 27 respondents
    - I can't afford or don't want to pay for food scrap collection services – 26 respondents
- When asked directly, 151 respondents indicated that they wanted "Universal curbside compost collection for all residents"

Topic: Solid Waste Assessment

- When asked if they would be willing to pay more to receive more collection services
    - 29.8% of respondents replied "Any amount, I think this is a critical service the City should offer" – 65 respondents

- 63.3% of respondents replied “It depends. I want to see the program being proposed, or options, and want more information on costs.” – 138 respondents
- 6.9% of respondents replied “No additional amount, I’m not interested in increased taxes for a universal curbside recycling or composting service” – 15 respondents

Business/Institution Survey Highlights

Topic: Recycling

- “Do you currently manage recyclables separately from trash at your place of business?”
  - 62.5% of respondents replied “Yes” – 10 respondents
  - 37.5% of respondents replied “No” – 6 respondents

Topic: Composting

- “If your business generates a lot of organic materials (food service establishments, grocery stores, or institutions), would you be interested in a separate collection system for compostables?
  - 26.7% of respondents replied “Yes” – 4 respondents
  - 13.3% of respondents replied “We already have one” – 2 respondents
  - 60% of respondents replied “Not applicable to my business” – 9 respondents

Topic: Additional Options

- “What additional – or different – options would you like to see offered to help your business reduce, reuse, recycle, and compost?”
  - “Require trash collection service providers to also provide recycling and composting collection services” – 9 respondents
  - “Require businesses to separate recyclables from trash for recycling collection” – 6 respondents
  - “Require businesses that generate a lot of organic materials to separate for compost collection” – 5 respondents
  - “I’m satisfied with the current options” – 5 respondents

Be Heard Helena Idea Board

Visitors to the website could share ideas (contributor) or vote on ideas (contribution). Sixty visitors engaged in the idea board with 29 contributors and 88 contributions. Ideas that received 4 or more votes included:

- Curbside collection for yard debris – 6 votes
- Add recycling for more plastics than #1 and #2 – 7 votes
- Universal recycling service – 7 votes & 5 votes (2 different ideas about the same topic)
- Remove recycling from weight limit at Transfer Station & more drop-off sites – 4 votes
- Divert construction and demolition debris – 4 votes

Be Heard Helena Story Board

One visitor shared a story about not wasting water.

Strategic Plan for Waste Reduction

June 2022

City of Helena, Montana

May 11, 2022

To: Interim City Manager, Tim Burton

From: Finance Director, Sheila Danielson
Executive Director HACF, Emily Frazier

Subject: Helena Area Community Foundation FY21/FY22 Grant Report

Present Situation: On June 28, 2021, the City Commission approved the FY22 Preliminary Budget which granted $402,000 to the Helena Area Community Foundation (HACF). These funds were made available due to CARES Act Savings in the General Fund. HACF partnered with the City of Helena to facilitate community grants to local non-profits in the Helena area to assist with recovery from negative economic impacts of the COVID-19 virus.

HACF created and is executing a grant program of $392,000. Non-profit grants are at least $2,000 and don't exceed $14,000. Grants are required to be matched on a 1:1 basis. Each grant is required to identify value created to the non-profit or community post COVID-19.

HACF is providing their annual update on the grant program in accordance with their fiscal year giving cycle.

Proposal/Objective: Review the May 2022 Helena Area Community Foundation Grant Report to the City of Helena.

Notice of Public Hearing: N/A

ATTACHMENTS:
HACF May 2022 Report to the City of Helena

HELENA AREA
COMMUNITY
FOUNDATION

May 2022

Helena Area Community Foundation
Report to the City of Helena

2021-2022 Grantmaking Cycle

Table of Contents

1. HACF IRS Letter
2. HACF most recent 990 (2020)
3. List of Board of Directors
4. List of Grant Selection Committee members
5. List of Grant Recipients
6. Grant Recipient Data
    a. Capital High Drama Club, $2000
    b. Cohesion Dance Project, $2000
    c. First Judicial District CASA/GAL, $2000
    d. Helena Community Gardens, $2000
    e. Holter Museum, $2000
    f. Myrna Loy Center, $1000
    g. Instar Enterprises, $2000
    h. The Angel Fund, $2000
    i. The Friendship Center, $2000
    j. Family Promise of Greater Helena, $2000

PUBLIC DISCLOSURE COPY

Form **990-EZ**

Short Form
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ **Do not enter social security numbers on this form, as it may be made public.**

▶ **Go to www.irs.gov/Form990EZ for instructions and the latest information.**

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0047

2020

Open to Public Inspection

A For the 2020 calendar year, or tax year beginning and ending

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending

C Name of organization: HELENA AREA COMMUNITY FOUNDATION

Number and street (or P.O. box if mail is not delivered to street address): P.O. BOX 92 | Room/suite

City or town, state or province, country, and ZIP or foreign postal code: HELENA, MT 59624

D Employer identification number 81-0536902

E Telephone number 406-441-4955

F Group Exemption Number ▶

G Accounting Method: ☐ Cash ☒ Accrual Other (specify) ▶

H Check ▶ ☐ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

I Website: ▶ WWW.HELENAAREACOMMUNITYFOUNDATION.ORG

J Tax-exempt status (check only one) — ☒ 501(c)(3) ☐ 501(c) ( )◀(insert no.) ☐ 4947(a)(1) or ☐ 527

K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are $200,000 or more, or if total assets (Part II, column (B)) are $500,000 or more, file Form 990 instead of Form 990-EZ ▶ $ 152,809.

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)

Check if the organization used Schedule O to respond to any question in this Part I ☒

Revenue	1	Contributions, gifts, grants, and similar amounts received		1	134,573.
	2	Program service revenue including government fees and contracts		2	
	3	Membership dues and assessments		3	
	4	Investment income SEE SCHEDULE O		4	4,246.
	5a	Gross amount from sale of assets other than inventory	5a 2,299.		
	b	Less: cost or other basis and sales expenses	5b		
	c	Gain or (loss) from sale of assets other than inventory (subtract line 5b from line 5a)		5c	2,299.
	6	Gaming and fundraising events:			
	a	Gross income from gaming (attach Schedule G if greater than $15,000)	6a		
	b	Gross income from fundraising events (not including $ 21,065. of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds $15,000)	6b 5,970.		
	c	Less: direct expenses from gaming and fundraising events	6c 18,419.		
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)		6d	-12,449.
	7a	Gross sales of inventory, less returns and allowances	7a		
	b	Less: cost of goods sold	7b		
	c	Gross profit or (loss) from sales of inventory (subtract line 7b from line 7a)		7c	
	8	Other revenue (describe in Schedule O) SEE SCHEDULE O		8	5,721.
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶		9	134,390.
Expenses	10	Grants and similar amounts paid (list in Schedule O) SEE SCHEDULE O		10	10,250.
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	60,374.
	13	Professional fees and other payments to independent contractors		13	6,664.
	14	Occupancy, rent, utilities, and maintenance SEE SCHEDULE O		14	4,773.
	15	Printing, publications, postage, and shipping		15	3,361.
	16	Other expenses (describe in Schedule O) SEE SCHEDULE O		16	35,550.
	17	**Total expenses.** Add lines 10 through 16 ▶		17	120,972.
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 9)		18	13,418.
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)		19	354,756.
	20	Other changes in net assets or fund balances (explain in Schedule O) SEE SCHEDULE O		20	34,424.
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 ▶		21	402,598.

LHA **For Paperwork Reduction Act Notice, see the separate instructions.**

Form **990-EZ** (2020)

032171 01-08-21

Part II **Balance Sheets** (see the instructions for Part II)

Check if the organization used Schedule O to respond to any question in this Part II ..... [X]

		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments	30,046.	22	50,502.
23	Land and buildings		23	
24	Other assets (describe in Schedule O) SEE SCHEDULE O	328,610.	24	371,400.
25	**Total assets**	358,656.	25	421,902.
26	**Total liabilities** (describe in Schedule O) SEE SCHEDULE O	3,900.	26	19,304.
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	354,756.	27	402,598.

Part III **Statement of Program Service Accomplishments** (see the instructions for Part III)

Check if the organization used Schedule O to respond to any question in this Part III [X]

What is the organization's primary exempt purpose? SEE SCHEDULE O

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)

28 SEE SCHEDULE O

(Grants $) If this amount includes foreign grants, check here ▶ [ ] 28a 87,154.

29

(Grants $) If this amount includes foreign grants, check here ▶ [ ] 29a

30

(Grants $) If this amount includes foreign grants, check here ▶ [ ] 30a

31 Other program services (describe in Schedule O)

(Grants $) If this amount includes foreign grants, check here ▶ [ ] 31a

32 **Total program service expenses** (add lines 28a through 31a) ▶ 32 87,154.

Part IV **List of Officers, Directors, Trustees, and Key Employees** (list each one even if not compensated - see the instructions for Part IV)

Check if the organization used Schedule O to respond to any question in this Part IV ..... [X]

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
GLENNA WORTMAN-OBIE DIRECTOR	1.00	0.	0.	0.
MARGARET CORCORAN DIRECTOR	1.00	0.	0.	0.
KACI CECH DIRECTOR	20.00	0.	0.	0.
TORI HUNTHAUSEN DIRECTOR	1.00	0.	0.	0.
SARA BERG DIRECTOR	1.00	0.	0.	0.
MARK BARRY DIRECTOR	1.00	0.	0.	0.
RAYLEE HONEYCUTT DIRECTOR	1.00	0.	0.	0.
JOHN MOORE DIRECTOR	1.00	0.	0.	0.
STEPHANIE BULL PAST PRESIDENT	1.00	0.	0.	0.
CURT LARSEN PRESIDENT	1.00	0.	0.	0.
JACKI FRANK TREASURER	5.00	0.	0.	0.
JEANNIE ETCHART VICE PRESIDENT	1.00	0.	0.	0.

Part V **Other Information** (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Sch. O to respond to any question in this Part V [X]

			Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O	33		X
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O. See instructions	34		X
35a	Did the organization have unrelated business gross income of $1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a		X
b	If "Yes" to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O	35b	N/A	
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III	35c		X
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	36		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a 0.			
b	Did the organization file **Form 1120-POL** for this year?	37b		X
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee; **or** were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a		X
b	If "Yes," complete Schedule L, Part II, and enter the total amount involved 38b N/A			
39	Section 501(c)(7) organizations. Enter:			
a	Initiation fees and capital contributions included on line 9 39a N/A			
b	Gross receipts, included on line 9, for public use of club facilities 39b N/A			
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ 0. ; section 4912 ▶ 0. ; section 4955 ▶ 0.			
b	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b		X
c	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 0.			
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization ▶ 0.			
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e		X

41 List the states with which a copy of this return is filed ▶ NONE

42a The organization's books are in care of ▶ JACKI FRANK Telephone no. ▶ 406-441-4955

Located at ▶ 33 S LAST CHANCE GULCH, STE 2A, HELENA, MT ZIP + 4 ▶ 59601

			Yes	No
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b		X
	If "Yes," enter the name of the foreign country ▶			
	See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
c	At any time during the calendar year, did the organization maintain an office outside the United States?	42c		X
	If "Yes," enter the name of the foreign country ▶			

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** - Check here ▶ [ ]
and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 N/A

			Yes	No
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a		X
b	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44b		X
c	Did the organization receive any payments for indoor tanning services during the year?	44c		X
d	If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	44d		
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a		X
b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ. See instructions	45b		

		Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46		X

Part VI Section 501(c)(3) Organizations Only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI ☐

		Yes	No
47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Sch. C, Part II	47		X
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48		X
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a		X
b If "Yes," was the related organization a section 527 organization?	49b		

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than $100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
NONE				

f Total number of other employees paid over $100,000 ▶

51 Complete this table for the organization's five highest compensated independent contractors who each received more than $100,000 of compensation from the organization. If there is none, enter "None." NONE

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over $100,000 ▶

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations must attach a completed Schedule A ▶ X Yes ☐ No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

▶ Signature of officer — Date

▶ EMILY FRAZIER, EXECUTIVE DIRECTOR
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self- employed	PTIN
KRYSTAL R. STEWART, CPA	KRYSTAL R. STEWART, CPA	09/02/21		P00762612

Firm's name ▶ ANDERSON ZURMUEHLEN & CO. P.C. Firm's EIN ▶ 81-0385940

Firm's address ▶ P.O. BOX 1040 HELENA, MT 59624 Phone no. 406-442-1040

May the IRS discuss this return with the preparer shown above? See instructions ▶ X Yes ☐ No

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

Part I **Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1 [ ] A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
2 [ ] A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ).)
3 [ ] A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
4 [ ] A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
5 [ ] An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
6 [ ] A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
7 [X] An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
8 [ ] A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
9 [ ] An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
10 [ ] An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
11 [ ] An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
12 [ ] An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a [ ] **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
b [ ] **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
c [ ] **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
d [ ] **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
e [ ] Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
f Enter the number of supported organizations .....
g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
Total						

LHA **For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.** 032021 01-25-21 **Schedule A (Form 990 or 990-EZ) 2020**

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	109,146.	58,541.	75,826.	71,650.	134,573.	449,736.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3	109,146.	58,541.	75,826.	71,650.	134,573.	449,736.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						6,892.
6 **Public support.** Subtract line 5 from line 4.						442,844.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
7 Amounts from line 4	109,146.	58,541.	75,826.	71,650.	134,573.	449,736.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	4,141.	2,574.	3,253.	3,771.	4,246.	17,985.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 **Total support.** Add lines 7 through 10						467,721.

12 Gross receipts from related activities, etc. (see instructions) 12 25,360.

13 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2020 (line 6, column (f), divided by line 11, column (f)) 14 94.68 %

15 Public support percentage from 2019 Schedule A, Part II, line 14 15 93.54 %

16a **33 1/3% support test - 2020.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☒

b **33 1/3% support test - 2019.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

17a **10% -facts-and-circumstances test - 2020.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ▶ ☐

b **10% -facts-and-circumstances test - 2019.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ ☐

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 **Public support.** (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 **Total support.** (Add lines 9, 10c, 11, and 12.)						

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2020 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2019 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2020** (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from **2019** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2020.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support tests - 2019.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* **Part VI** *how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? *If "Yes," explain in* **Part VI** *how the organization determined that the supported organization was described in section 509(a)(1) or (2).*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer lines 3b and 3c below.*	3a		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in* **Part VI** *when and how the organization made the determination.*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* **Part VI** *what controls the organization put in place to ensure such use.*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in* **Part VI** *how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.*	4b		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in* **Part VI** *what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.*	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in* **Part VI,** *including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).*	5a		
b	**Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in* **Part VI.**	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).*	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in* **Part VI.**	9a		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in* **Part VI.**	9b		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in* **Part VI.**	9c		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below.*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)*	10b		

Part IV Supporting Organizations *(continued)*

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described in lines 11b and 11c below, the governing body of a supported organization?	**11a**		
b	A family member of a person described in line 11a above?	**11b**		
c	A 35% controlled entity of a person described in line 11a or 11b above? *If "Yes" to line 11a, 11b, or 11c, provide detail in* **Part VI.**	**11c**		

Section B. Type I Supporting Organizations

			Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? *If "No," describe in* **Part VI** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.*	**1**		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* **Part VI** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.*	**2**		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in* **Part VI** *how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).*	**1**		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	**1**		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? *If "No," explain in* **Part VI** *how the organization maintained a close and continuous working relationship with the supported organization(s).*	**2**		
3	By reason of the relationship described in line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* **Part VI** *the role the organization's supported organizations played in this regard.*	**3**		

Section E. Type III Functionally Integrated Supporting Organizations

1 *Check the box next to the method that the organization used to satisfy the Integral Part Test during the year* **(see instructions).**

a ☐ The organization satisfied the Activities Test. *Complete* **line 2** *below.*

b ☐ The organization is the parent of each of its supported organizations. *Complete* **line 3** *below.*

c ☐ The organization supported a governmental entity. *Describe in* **Part VI** *how you supported a governmental entity (see instructions).*

			Yes	No
2	Activities Test. **Answer lines 2a and 2b below.**			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in* **Part VI identify those supported organizations and explain** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	**2a**		
b	Did the activities described in line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in* **Part VI** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	**2b**		
3	Parent of Supported Organizations. **Answer lines 3a and 3b below.**			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No" provide details in* **Part VI.**	**3a**		
b	Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? *If "Yes," describe in* **Part VI** *the role played by the organization in this regard.*	**3b**		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in* **Part VI**). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1		
2 Recoveries of prior-year distributions	2		
3 Other gross income (see instructions)	3		
4 Add lines 1 through 3.	4		
5 Depreciation and depletion	5		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7 Other expenses (see instructions)	7		
8 **Adjusted Net Income** (subtract lines 5, 6, and 7 from line 4)	8		

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a Average monthly value of securities	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d **Total** (add lines 1a, 1b, and 1c)	1d		
e **Discount** claimed for blockage or other factors (*explain in detail in* **Part VI**):			
2 Acquisition indebtedness applicable to non-exempt-use assets	2		
3 Subtract line 2 from line 1d.	3		
4 Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6 Multiply line 5 by 0.035.	6		
7 Recoveries of prior-year distributions	7		
8 **Minimum Asset Amount** (add line 7 to line 6)	8		

Section C - Distributable Amount			Current Year
1 Adjusted net income for prior year (from Section A, line 8, column A)	1		
2 Enter 0.85 of line 1.	2		
3 Minimum asset amount for prior year (from Section B, line 8, column A)	3		
4 Enter greater of line 2 or line 3.	4		
5 Income tax imposed in prior year	5		
6 **Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6		

7 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).

Schedule A (Form 990 or 990-EZ) 2020

Part V **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** *(continued)*

Section D - Distributions			**Current Year**
1	Amounts paid to supported organizations to accomplish exempt purposes	1	
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4	Amounts paid to acquire exempt-use assets	4	
5	Qualified set-aside amounts (prior IRS approval required - *provide details in* **Part VI**)	5	
6	Other distributions (*describe in* **Part VI**). See instructions.	6	
7	**Total annual distributions.** Add lines 1 through 6.	7	
8	Distributions to attentive supported organizations to which the organization is responsive (*provide details in* **Part VI**). See instructions.	8	
9	Distributable amount for 2020 from Section C, line 6	9	
10	Line 8 amount divided by line 9 amount	10	

Section E - Distribution Allocations (see instructions)		**(i) Excess Distributions**	**(ii) Underdistributions Pre-2020**	**(iii) Distributable Amount for 2020**
1	Distributable amount for 2020 from Section C, line 6			
2	Underdistributions, if any, for years prior to 2020 (reasonable cause required - *explain in* **Part VI**). See instructions.			
3	Excess distributions carryover, if any, to 2020			
a	From 2015			
b	From 2016			
c	From 2017			
d	From 2018			
e	From 2019			
f	**Total** of lines 3a through 3e			
g	Applied to underdistributions of prior years			
h	Applied to 2020 distributable amount			
i	Carryover from 2015 not applied (see instructions)			
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4	Distributions for 2020 from Section D, line 7: $			
a	Applied to underdistributions of prior years			
b	Applied to 2020 distributable amount			
c	Remainder. Subtract lines 4a and 4b from line 4.			
5	Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, *explain in* **Part VI.** See instructions.			
6	Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. For result greater than zero, *explain in* **Part VI**. See instructions.			
7	**Excess distributions carryover to 2021.** Add lines 3j and 4c.			
8	Breakdown of line 7:			
a	Excess from 2016			
b	Excess from 2017			
c	Excess from 2018			
d	Excess from 2019			
e	Excess from 2020			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
▶ **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

2020

Name of the organization	**Employer identification number**
HELENA AREA COMMUNITY FOUNDATION	81-0536902

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	[X] 501(c)(3) (enter number) organization
	[ ] 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	[ ] 527 political organization
Form 990-PF	[ ] 501(c)(3) exempt private foundation
	[ ] 4947(a)(1) nonexempt charitable trust treated as a private foundation
	[ ] 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

[ ] For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

[X] For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

[ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

[ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year ..... ▶ $ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA **For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.**

Schedule B (Form 990, 990-EZ, or 990-PF) (2020)

023451 11-25-20

Name of organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		$ 6,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

Name of organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e) and** the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this info. once.) ▶ $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.

▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

Part I **Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- **a** ☐ Mail solicitations
- **b** ☐ Internet and email solicitations
- **c** ☐ Phone solicitations
- **d** ☐ In-person solicitations
- **e** ☐ Solicitation of non-government grants
- **f** ☐ Solicitation of government grants
- **g** ☐ Special fundraising events

2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☐ **Yes** ☐ **No**

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	**(ii)** Activity	**(iii)** Did fundraiser have custody or control of contributions? Yes	No	**(iv)** Gross receipts from activity	**(v)** Amount paid to (or retained by) fundraiser listed in col. **(i)**	**(vi)** Amount paid to (or retained by) organization
Total ▶						

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

LHA **For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.**

Schedule G (Form 990 or 990-EZ) 2020

032081 11-25-20

Part II **Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

		(a) Event #1 HELENA HOLIDAY CRUI (event type)	(b) Event #2 (event type)	(c) Other events NONE (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts	27,035.			27,035.
	2 Less: Contributions	21,065.			21,065.
	3 Gross income (line 1 minus line 2)	5,970.			5,970.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	18,419.			18,419.
	10 Direct expense summary. Add lines 4 through 9 in column (d) ▶				18,419.
	11 Net income summary. Subtract line 10 from line 3, column (d) ▶				-12,449.

Part III **Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes_____ % ☐ No	☐ Yes_____ % ☐ No	☐ Yes_____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) ▶				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) ▶				

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: _____

11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No

12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

13 Indicate the percentage of gaming activity conducted in:

a The organization's facility **13a** %

b An outside facility **13b** %

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization ▶ $ _____ and the amount of gaming revenue retained by the third party ▶ $ _____

c If "Yes," enter name and address of the third party:

Name ▶

Address ▶

16 Gaming manager information:

Name ▶

Gaming manager compensation ▶ $ _____

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $

Part IV **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Part IV **Supplemental Information** *(continued)*

SCHEDULE O
(Form 990 or 990-EZ)
Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047
2020
Open to Public Inspection

Name of the organization: HELENA AREA COMMUNITY FOUNDATION
Employer identification number: 81-0536902

FORM 990-EZ, PART I, LINE 4, OTHER INVESTMENT INCOME:

DESCRIPTION OF PROPERTY:	AMOUNT:
INVESTMENT EARNINGS ON AGENCY ENDOWMENTS	4,246.

FORM 990-EZ, PART I, LINE 8, OTHER REVENUE:

DESCRIPTION OF OTHER REVENUE:	AMOUNT:
REIMBURSED EXPENSES	5,721.

FORM 990-EZ, PART I, LINE 10, GRANTS AND SIMILAR AMOUNTS PAID:

ACTIVITY CLASSIFICATION: COMMUNITY NEEDS
GRANTEE NAME: UNITED WAY OF LEWIS & CLARK AREA
GRANTEE ADDRESS: 75 E LYNDALE AVE HELENA, MT 59601
GRANTEE RELATIONSHIP: NONE
DATE OF GIFT: 09/15/20
AMOUNT GIVEN: 10,250.
TOTAL INCLUDED ON FORM 990-EZ, LINE 10 10,250.

FORM 990-EZ, PART I, LINE 14, OCCUPANCY, RENT, UTILITIES, AND MAINTENANCE:

DESCRIPTION OF EXPENSES:	AMOUNT:
DEPRECIATION	300.
OTHER EXPENSES	4,473.
TOTAL TO FORM 990-EZ, LINE 14	4,773.

FORM 990-EZ, PART I, LINE 16, OTHER EXPENSES:

DESCRIPTION OF OTHER EXPENSES:	AMOUNT:

Name of the organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

ADVERTISING	3,658.
SUPPLIES	3,522.
COMPUTER EXPENSES	1,398.
MISCELLANEOUS	5,766.
PAYROLL TAXES	5,142.
INSURANCE	1,816.
BOARD EXPENSES	310.
CONFERENCES, CONVENTIONS & MEETINGS	540.
BANK CHARGES, INVESTMENT, AND OTHER	4,000.
GRANTS	7,433.
PROFESSIONAL DEVELOPMENT	1,965.
TOTAL TO FORM 990-EZ, LINE 16	35,550.

FORM 990-EZ, PART I, LINE 20, CHANGES IN NET ASSETS:

CHANGES IN NET ASSETS OR FUND BALANCES:	AMOUNT:
UNREALIZED GAIN AGENCY ENDOWMENT	34,424.

FORM 990-EZ, PART II, LINE 24, OTHER ASSETS:

DESCRIPTION	BEG. OF YEAR	END OF YEAR
AGENCY ACCOUNTS ON DEPOSIT WITH MCF	312,522.	349,659.
ENDOWMENT DISTRIBUTION RECEIVABLE	14,821.	21,191.
PREPAID EXPENSES	417.	0.
OTHER DEPRECIABLE ASSETS	850.	550.
TOTAL TO FORM 990-EZ, LINE 24	328,610.	371,400.

FORM 990-EZ, PART II, LINE 26, OTHER LIABILITIES:

DESCRIPTION	BEG. OF YEAR	END OF YEAR
ACCRUED PAYROLL AND TAXES	3,675.	1,512.

Name of the organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

ACCOUNTS PAYABLE	225.	3,901.
LOAN PAYABLE	0.	11,122.
FISCAL AGENT LIABILITY	0.	2,769.
TOTAL TO FORM 990-EZ, LINE 26	3,900.	19,304.

FORM 990-EZ, PART III, PRIMARY EXEMPT PURPOSE - FINANCIAL ASSISTANCE TO NONPROFITS BENEFITING LEWIS & CLARK COUNTY RESIDENTS. FUNDRAISING COSTS TO BUILD ENDOWMENT FOR GRANTS, WHICH IS THE EXEMPT PURPOSE.

FORM 990-EZ, PART III, LINE 28, PROGRAM SERVICE ACCOMPLISHMENTS:
THE GRANTS AS LISTED IN THIS RETURN ARE FUNDED WITH EARNINGS FROM AN ENDOWMENT FUND HELD AS AN ASSET OF MONTANA COMMUNITY FOUNDATION, AN AGENCY ENDOWMENT FUND HELD FOR HACF AT MCF, BOARD DESIGNATED FUNDS AND FUNDS RECEIVED FOR RE-GRANTING.

FORM 990-EZ, PART V, INFORMATION REGARDING PERSONAL BENEFIT CONTRACTS:
THE ORGANIZATION DID NOT, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY, OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT.
THE ORGANIZATION, DID NOT, DURING THE YEAR, PAY ANY PREMIUMS, DIRECTLY, OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT.

Name of the organization: HELENA AREA COMMUNITY FOUNDATION

Employer identification number: 81-0536902

Part IV **List of Officers, Directors, Trustees, and Key Employees.** List each one even if not compensated. (see the instructions for Part IV.)

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (If not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
EMILY FLEMMING (FRAZIER) EXECUTIVE DIRECTOR	40.00	57,069.	0.	0.
KIM LLOYD SECRETARY	1.00	0.	0.	0.

Helena Area Community Foundation Board of Directors 2022

President
Jeannie Etchart
Etchart Events

Secretary
Kim Lloyd
St. Peter's Health

Treasurer
Mark Barry
Retired Executive

Secretary
Raylee Honeycutt
Montana Stockgrowers Association

Past President
Sara Berg
Browning, Kaleczyc, Berry & Hoven

Jan Brown
Retired Legislator

Stephanie Bull
Opportunity Bank

DarAnne Dunning
Drake Law Firm

Curt Larsen
Retired Executive

John Moore
Nonprofit leader and Musician

Mike Rooney
Helena Area Habitat for Humanity

Ellie Webster
Montana Legal Services Association

Grant Evaluation Committee

Evaluators:

John Moore
Community Connections Committee Chair
Helena Area Community Foundation Board Member
Lead Evaluator

Jan Brown
Community Connections Committee Member
Helena Area Community Foundation Board Member

Stephanie Bull
Community Connections Committee Member
Helena Area Community Foundation Board Member

Ellen Feaver
Community Connections Committee Member

Billie Miller
Community Member

Sumner Sharpe
Community Member

Facilitator

Emily Frazier
Executive Director
Helena Area Community Foundation

List of Grant Recipients

Capital High Drama Club, $2000

Cohesion Dance Project, $2000

First Judicial District CASA/GAL, $2000

Helena Community Gardens, $2000

Holter Museum, $2000

Myrna Loy Center, $1000

Instar Enterprises, $2000

The Angel Fund, $2000

The Friendship Center, $2000

Family Promise of Greater Helena, $2000

Total Funding Awarded: $19,000

Capital High Drama Club

Grant Amount $2000

Organization's Mission: To educate students and the community through entertainment

Description of Project or Program: Royalty fees for our annual cross-town musical production. By alleviating the costs of expensive musical royalties, we can use our funds for publicity and outreach to the community. We want our performances to be seen by those who may be under the misconception that good theatre isn't possible at the high school level. We run our rehearsals efficiently and professionally and put out an amazing production every year. Our goal is to get as many non-parental community members to come see our shows and spread the word!

Expressed Public Benefit to the City of Helena: Our cast, crew, and live orchestra consists of over 80 students from both high schools in town. Our production team includes both choir teachers, drama teachers and orchestra teacher. With friends and family traveling into town, we help the tourism industry. Because we often choose musicals from the 1950s-60s, we travel to the nursing homes and assisted living centers to perform for their residents. We have also started to cast younger students from the middle and elementary schools as a way of garnering interest in our art forms. Covid-19 dealt a serious blow to the performing arts over the past couple of years; no performances, no singing or playing for fear of contagion spread--it has been a quiet couple of years. Student awareness of our programs is low. In order to have art in our young community's lives, our goal is to reach out to them through these types of productions so they know what is possible.

Your Helena Public Schools
...a great place to learn

To Whom It May Concern

Helena School District No 1 is incorporated under the laws of the State of Montana as a public supported educational institution. The major funding sources for the District come from the State of Montana, local taxpayers of Lewis and Clark County, and the Federal Government.

The District is by its very nature a non-profit organization and is subject to the provisions found under Section 501 (c) (3) of the Internal Revenue Code.

The Internal Revenue Service has informed this District we do not need a tax exempt number by virtue of our public tax support status.

Helena School District No. 1 employer ID number is 81-6000557.

Respectfully,

Kim Harris
Business Services Management Administrator

55 South Rodney Street • Helena, Montana 59601
• Area Code 406 • Payroll 447-8528 • Personnel 447-8575 • Business 447-8565 •
• Insurance 447-8538 • Sub Clerk 447-8590 • Fax 447-8542 •

Internal Revenue Service

Department of the Treasury

P. O. Box 2508
Cincinnati, OH 45201

Date: April 24. 2002

Person to Contact:
Yvette Davis 31-07341
Customer Service Representative
Toll Free Telephone Number:
8:00 A.M. to 6:30 P.M. EST
877-829-5500
Fax Number:
513-263-3756
Federal Identification Number:
81-6000557

County of Lewis & Clark Lewis & Clark
County School District 1
55 South Rodney
Helena MT 59601-5763 558

Dear Sir or Madam:

This responds to your request for information concerning your organization's federal tax status.

Our records indicate that your organization may be a governmental instrumentality or a political subdivision of a state.

No provision of the Internal Revenue Code imposes a tax on the income of governmental units (such as states and their political subdivisions). Therefore, it has been the position of the Service that income of governmental units is not generally subject to federal income taxation. If, however, an entity is not itself a governmental unit (or an "integral part" thereof), its income will be subject to tax unless an exclusion or exemption applies.

One exclusion is provided by section 115(1) of the Code, which excludes from gross income:

(A) income derived from the exercise of any essential governmental function, and

(B) income accruing to a state or political subdivision.

Your organization's income may not be subject to tax, either because the organization is a governmental unit (or an "integral part" thereof), or because the income is excluded under section 115. In addition, your organization may also be eligible to receive charitable contributions, which are deductible for federal income, estate, and gift tax purposes. Also, your organization is probably exempt from many federal excise taxes.

Your organization may obtain a letter ruling on its status under section 115, following the procedures specified in Rev. Proc. 2001-1 or its successor.

Your organization may also qualify for exemption from federal income tax as an organization described in section 501(c)(3) of the Code. If the organization is an entity separate from the state, county, or municipal government, and if it does not have powers or purposes inconsistent with exemption (such as the power to tax or to exercise enforcement of regulatory powers), your organization would qualify under section 501(c)(3). To apply for exemption, complete Form 1023 and pay the required user fee.

County of Lewis & Clark Lewis & Clark County School District 1
81-6000557

Sometimes governmental units are asked to provide proof of their status as part of a grant application. If your organization is applying for a grant from a private foundation, the foundation may be requesting certain information from your organization because of the restrictions imposed by the Code on such foundations. One such restriction imposes a tax on private foundations that make any "taxable expenditures." Under section 4945(d) and (h) of the Code, "taxable expenditures" include (1) any grant to an organization (unless excepted), unless the foundation exercises "expenditure responsibility" with respect to the grant; and (2) any expenditure for non-charitable purposes. Under section 4942 of the Code, private foundations must also distribute certain amounts for charitable purposes each year--"qualifying distributions"--or incur a tax on the undistributed amount. "Qualifying distributions" include certain amounts paid to accomplish charitable purposes.

Private foundation grants to governmental units for public or charitable purposes are not taxable expenditures under these provisions, regardless of whether the foundation exercises "expenditure responsibility." Under section 53.4945-5(a)(4)(ii) of the Foundation and Similar Excise Tax Regulations, expenditure responsibility is not required for grants for charitable purposes to governmental units (as defined in section 170(c)(1) of the code). Similarly, grants to governmental units for public purposes are "qualifying distributions", under section 53.4942(a)-3(a) of the regulations; and, if they are for charitable purposes, will not be taxable expenditures, under section 53.4945-6(a) of the regulations. Most grants to governmental units will qualify as being for charitable (as well as public) purposes.

Because of these restrictions, some private foundations require grant applicants to submit a letter from the Service determining them to be exempt under section 501(c)(3) and classified as a non-private foundation. Such a letter, or an underlying requirement that a grantee be a public charity, is not legally required to be relieved from the restrictions described above, when the prospective grantee is a governmental unit and the grant is for qualifying (public or charitable) purposes.

We believe this general information will be of assistance to your organization. This letter, however, is not a ruling and may not be relied on as such. If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

John E. Ricketts

John E. Ricketts, Director, TE/GE
Customer Account Services

OFFICE OF PUBLIC INSTRUCTION
PO BOX 202501
HELENA MT 59620-2501
www.opi.state.mt.us
(406) 444-3095
(888) 231-9393
(406) 444-0169 (TTY)

Linda McCulloch
Superintendent

September 10, 2003

TO: School Business Officials

FROM: Joan Anderson, Division Administrator
School Finance Division

RE: Accepting Donations that Will Be Tax Deductible to the Donor -- 501(c)(3) Status Not Required

The Internal Revenue Service (IRS) recently sent OPI written confirmation that public school districts in Montana are qualified to accept donations for which a donor plans to claim a tax deduction. The district does not need to file an application or be approved for 501(c)(3) status. ***This is a change from what we had been told in the past, so we are writing to notify you of the change.*** The message we received by e-mail appears below:

"From: TaxHelp@hal1.ausc.irs.gov
Sent: Friday, May 16, 2003 2:52 PM
To: janderson@state.mt.us
Subject: IRS Email Tax Law Assistance
. . .

Your Question Was:
RE: Public School Districts Acceptance of Donations and Contributions
....Publication 526 states, Organizations That Qualify To Receive Deductible Contributions You can deduct your contributions only if you make them to a qualified organization. To become a qualified organization, most organizations other than churches and governments, as described below, must apply to the IRS. In Montana, public school districts are legally classified as local governments. Would public K-12 school districts normally be automatically qualified or are public K-12 schools normally required to file for 501(or other similar) status before they are considered qualified? We have read so much written material but seem to never find a clear answer to the question. MTs school districts are state funded, and any donations to the districts are used exclusively for public education purposes or scholarships. Thanks. Joan Anderson, School Finance Director, Montana Office of Public Instruction

The Answer To Your Question Is:
Thank you for your E-mail inquiry, and we regret the difficulty you have experienced in finding a clear response to the issue of whether a Montana School District is considered a qualifying organization for the deductibility of contributions. A state school district is a qualifying 50% organization as it falls under the criteria listed in Number 2 under "50% Limit Organizations discussed on page 9 of Publication 526, 'Charitable Contributions'. Based on the facts presented, it is assumed the school district is an educational organization established by the state made up of and overseeing educational institutions (public schools) having a regularly enrolled student body. As such, the school district is not required to apply for 501(c) status, and is considered by definition to be a qualifying organization. We hope this response is helpful, and is based on Publication 526. . . .
EMPLOYEE ID: 04-01108 Mr. Bisceglia Tel.:(800) 829-1040 msg#: 1428964"

Please keep this letter on file. OPI suggests you provide a copy of this letter and your district tax EIN# if an individual donor or grantor asks for proof of your district's tax exemption or 501(c)(3) authorization. If you need additional information, please contact OPI at (406) 444-4401.

Cc: County Superintendents School District Auditors OPI Legal Counsel

"It is our mission to advocate, communicate, educate and be accountable to those we serve."

Cohesion Dance Project

Grant Amount $2000

Organization's Mission: To educate students and the community through entertainment

Description of Project or Program: CPD is seeking grant funding in the amount of $2,000 to support the creation of a digital storybook and updated activity guide introducing Helena area students to its schooltime matinee production of Shira Greenberg's Nutcracker on the Rocks (NOTR). During the past two live productions of NOTR in 2018 and 2019, the 80+ person cast of NOTR performed a live, full-length, schooltime matinee of this unique and inspiring production for over 1600 school children each year from across the Helena School District and beyond.

In response to teacher feedback requesting more introduction to the matinee prior to attending the live event, and to help students get the most out of the live theater experience, CDP will be creating a 15-minute video to accompany its student activity guide. During the video, one of the lead characters in the performance, Madame Drosselmeier, will read the storyline as written by the original creator, Shira Greenberg. Drosselmeier will read from an enlarged prop in the form of a book, with photos and video excerpts from previous productions digitally imprinted on each page, so students can visually follow along as she reads the story.

Expanding outreach opportunities into the schools was one of the main strategic initiatives outlined by CDP's Board of Directors during its 2019 Board Retreat. While the live matinee has helped to meet this goal, providing the digital storybook will further engage students and enhance their experience with this important arts opportunity, making it a high priority for the organization.

Expressed Public Benefit to the City of Helena:

The digital storybook and accompanying activity guide will provide schools an important opportunity to incorporate the arts into the classroom. The arts not only encourage creativity and expression but can act as a springboard to exploring even greater topics such as diversity, tolerance, and cultural traditions. These crucial topics are seamlessly woven into the core of this production. As was the intent of the original production, created in Albuquerque, NM in 1997, the cast of the Helena production is comprised of dancers and non-dancers of all ages, abilities, and socioeconomic backgrounds exploring movement within their own unique body structure and working with others in an environment of partnership, mentorship, and collaboration. By witnessing the powerful interactions between people with and without disabilities dancing together, the barriers of fear, isolation, and misunderstanding that often surround people with disabilities, are broken down and audiences receive exposure and

palpable education in the lessons of acceptance, inclusion, diversity, and compassion. These critical life lessons are so important, now more than ever, and are lessons the students will carry with them beyond the theater, into their homes and family lives.

The digital storybook and updated activity guide will greatly enhance the students' experience at the matinee and more easily facilitate deeper discussions about these concepts of acceptance, inclusion, diversity, and compassion.

Not only will Helena area students benefit, but CDP will be collaborating with a local artist and videographer to create the video itself as well as the book and set used in the video, providing meaningful work for local artists.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: MAY 0 2 2013

COHESION DANCE PROJECT
512 SUSSEX COURT
HELENA, MT 59601

Employer Identification Number:
45-5088857
DLN:
17053143348042
Contact Person:
ALICE T LI ID# 95032
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
June 30
Public Charity Status:
509(a)(2)
Form 990 Required:
Yes
Effective Date of Exemption:
February 24, 2012
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

COHESION DANCE PROJECT

Sincerely,

Holly O. Paz

Holly O. Paz
Director, Exempt Organizations
Rulings and Agreements

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

First Judicial District CASA GAL

Grant Amount $2000

Organization's Mission: The mission of CASA (Court Appointed Special Advocates) is to provide volunteer guardians to work on behalf of abused and neglected children to promote their best interests in the pursuit of safe, permanent homes.

Description of Project or Program: This grant will be used to cover the cost of conducting thorough background checks for every prospective CASA volunteer, and updating these records for each existing CASA volunteer. This need is a top priority for our organization, as it ensures the safety and wellbeing of the children we serve, as well as compliance with National CASA/GAL standards.
Our screening process for prospective volunteers includes verifying social security numbers of all applicants, checking local, state, and national criminal records, national sex offender registry, and child protective services records. Grant funds will be used to add another background check that will increase our existing security and screening measures. In addition to our existing measures, we intend to have all prospective volunteers submit to a fingerprint background check, which will allow us to conduct a search of FBI criminal history records. We also intend to conduct fingerprint checks for all existing CASA volunteers in 2022 and every four years thereafter to keep our records up to date.

Expressed Public Benefit to the City of Helena: This project will benefit the residents of the City of Helena by helping to screen and train qualified, safe individuals to advocate for children who have experienced abuse or neglect. Evidence gathered by the National CASA/GAL Association shows that children with CASA/GAL volunteers spend less time in long-term foster care, experience fewer placements, receive more services, and have better school performance than children without a CASA/GAL.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: SEP 25 2003

FIRST JUDICIAL DISTRICT CASA-GAL
PROGRAM INC
21 N LAST CHANCE GULCH STE 102
HELENA, MT 59601

Employer Identification Number:
81-0523987
DLN:
17053242711043
Contact Person:
ERIC J BERTELSEN ID# 31323
Contact Telephone Number:
(877) 829-5500
Public Charity Status:
170(b)(1)(A)(vi)

Dear Applicant:

Our letter dated MAY 1999, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity during an advance ruling period.

Based on our records and on the information you submitted, we are pleased to confirm that you are exempt under section 501(c)(3) of the Code, and you are classified as a public charity under the Code section listed in the heading of this letter.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at www.irs.gov.

If you have general questions about exempt organizations, please call our toll-free number shown in the heading between 8:00 a.m. - 6:30 p.m. Eastern time.

Please keep this letter in your permanent records.

Sincerely yours,

Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Letter 1050 (DO/CG)

Helena Community Gardens

Grant Amount $2000

Organization's Mission: Helena Community Gardens builds gardens, provides the tools and knowledge to grow food, and increases access to healthy and affordable food.

Description of Project or Program: With an average annual operating budget of $20,000, this grant allows us to rebuild aging infrastructure of Helena Community Garden's oldest and largest garden, Waukesha. This site hosts 43 large in-ground beds and is utilized by over 150 people. Last year, this garden donated nearly 1000 pounds of fresh vegetables to Helena Food Share but could be more accessible, more productive if the pathways were improved by removing weeds and old weed fabric, laying down weed barrier and a more permanent surface. Garden Managers also hope to build at least three new raised beds in plots to support beginning gardeners. The priority for this project is very important as it is one of our last major locations to receive infrastructure improvements. Recently, the city of Helena invested money in a well for the garden and the adjacent park, we know that with these improvements, Helenans will have an opportunity to grow their own food, attend educational events open to all for years to come. We know that for this location to remain viable and attractive to gardeners and the community, we need to invest in these improvements as soon as possible.

Expressed Public Benefit to the City of Helena: In 2021, HCG served 197 households by providing gardening space at 10 different community gardens throughout the Helena area. In addition to produce grown for their own consumption and shared with neighbors, this year HCG's gardeners donated over 11,000 pounds of organically grown vegetables to Helena Food Share. In 2021, HCG finalized two foodshare beds at Bausch Community Garden behind the YMCA, replaced 10 raised beds and updated the garden paths at Selma Held Garden off Saddle Drive. Our partnership with East Helena Food and Culture Hub has supported the revitalization of the East Helena Community Garden. We added a large foodshare plot at 6th Ward Garden, rebuilt fourteen aging beds at Plymouth Garden and expanded on our pollinator patches at two locations across town. As sustainability and wise-use of our natural resources is an underlying value of HCG, we encourage and teach composting, drip irrigation and planting pollinator feeding beds in all our gardens.
HCG has an annual operating budget of $20,000, with plot fees going towards water costs and utility bills at each garden, tools, coordinator pay, and safety equipment, but they are not sufficient to fund all the services we provide. Donations, fundraising and 3,000 volunteer hours from board members, garden managers, gardeners, and many others in the community help offset project costs.
Currently, the organization employs a ¼ time staff person (15 hours per week) who coordinates all events, volunteers, plot signups, and projects.
HCG's request for support.
This grant benefits the community by improving the aging infrastructure of Helena's oldest operational community garden and making this area more attractive, accessible and productive for the surrounding community.

IRS Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0752251399
Mar. 14, 2014 LTR 4168C 0
81-0510168 000000 00
Input Op: 0752251399 00018059
BODC: TE

HELENA COMMUNITY GARDENS
% MARY M CAFERRO
PO BOX 1222
HELENA MT 59624-1222

023500

Employer Identification Number: 81-0510168
Person to Contact: CUSTOMER SERVICE
Toll Free Telephone Number: 1-877-829-5500

Dear HELENA COMMUNITY GARDENS:

This is in response to your Mar. 05, 2014, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(03) of the Internal Revenue Code in a determination letter issued in OCTOBER 1996.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

0752251399
Mar. 14, 2014 LTR 4168C 0
81-0510168 000000 00
Input Op: 0752251399 00018060

HELENA COMMUNITY GARDENS
% MARY M CAFERRO
PO BOX 1222
HELENA MT 59624-1222

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Kim D. Bailey
Operations Manager, AM Operations 3

The Holter Museum

Grant Amount $2000

Organization's Mission: The Holter Museum inspires, connects, and heals our community through contemporary exhibitions and innovative arts programming. The Holter is dedicated to bringing the healing powers of art to all communities. Through our unique and progressive arts programming, exhibitions, and events, the Holter includes all youth, adults, and the health community to bring creativity and accepting spaces for those in the community to come together to make innovative and unique relationships and experiences.

Description of Project or Program: The grant would provide funding to purchase two months of art supplies for our new E. L. Wiegand Creativity Center (the W) Community Art Closet. As a community arts center, having art supplies and tools available on a daily basis for patrons to use and experiment with in the W is a high-level priority. The funds requested will help us continue to provide a flexible and accessible community space that encourages creativity and arts education for the Helena community to create a more vibrant and diverse place for all members to learn, play, and live.

Expressed Public Benefit to the City of Helena: The art supplies purchased from this grant funding for the W Community Art Closet will be available on a daily basis for patrons to use and experiment with in the W, providing a creative community space for artists of all ages.

The W is a new versatile art space located in the Holter's repurposed Sherman Gallery, providing a diverse arts hub that connects our community through arts engagement programs, events, and meaningful community exhibitions. The mission of the W is to amplify community through accessible arts experiences for all, supporting creative, energizing environments and art-based activities that encourage visitors to participate in opportunities that lead them to create, explore, and interact to build a more connected community. This multi-functional and centralized space provides art supplies for every-day use, technology, a community stage, rental spaces, and other resources for classes, workshops, events, and art performances for all ages.

Through the incorporation of the W, the Holter can expand our youth arts programming, providing more classes, workshops, digital arts programs, and outreach activities that allow for collaborations with community organizations and businesses, leading to arts learning experiences that reach a larger, more diverse demographic of people. To achieve this goal, we will partner with visiting artists participating in our Artist in Residency Program, whom school-aged participants can work with, learn from, and generate more outreach opportunities within our community.

In addition, the W will offer a variety of expanded adult art programs. This programming will include weekly figure drawing classes, monthly specialty workshops (i.e. ceramics, teaching artist-led classes, crafting, textile arts, etc.), team-building activities, and more. Additionally, there will be more artist-led workshops directly relating to current exhibitions on display in the museum's galleries. This expanded arts programming for adults provides a versatile selection of learning opportunities that will appeal to the interests of a large demographic, meeting the public's need for more adult programming in the Helena community.

With support from individual donors, the E. L. Wiegand Foundation, the Murdock Charitable Trust, private foundations, and public grants, this new extension of the Holter continues to grow and strengthen our mission of inspiring, connecting, and healing our community through contemporary exhibitions and innovative arts programming.

INTERNAL REVENUE SERVICE
DISTRICT DIRECTOR
1100 COMMERCE STREET
DALLAS, TX 75242

DEPARTMENT OF THE TREASURY

Date: MAY 31 1996

HOLTER MUSEUM OF ART INC
12 E LAWRENCE ST
HELENA, MT 59601-4019

Employer Identification Number:
81-0472958
Case Number:
366121062
Contact Person:
MRS. R. COOLEY
Contact Telephone Number:
(312) 886-6532
Our Letter Dated:
January 09, 1992
Addendum Applies:
No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

Bobby E. Scott

Bobby E. Scott
District Director

Letter 1050 (DO/CG)

The Myrna Loy Center for the Arts

Grant Amount $1000

Organization's Mission: To inspire the people of Helena with innovative, high-quality arts experiences of all kinds; to support Montana artists in their work; to foster a lifelong love of the arts through robust arts education; and to build community through art.

Description of Project or Program: To help us present new, high-quality live performances specifically for children and young families, including puppet arts and other forms that are not available to Helena kids. The Myrna Loy began creating a puppet arts program for young families when Covid hit, and we are excited to develop this in the coming year--particularly important as young kids need to engage with meaningful live arts experiences now more than ever. There are very few opportunities in Helena for young families to experience high-quality performing arts together as a family.

Arts education is one of The Myrna Loy's top priorities. Covid limitations prevented us from bringing arts into schools and the young-family community for the past 2 years, and we are eager to address this deficit in the coming year. This program would focus on high quality, kid-oriented programming at The Myrna Loy that would bring multiple generations together to experience wonderful art.

Expressed Public Benefit to the City of Helena: This project serves the growing number of kids and young families who seek healthy, inspiring activities to do together, especially during the cold months. It brings respite and joy to Helena parents who have had to stay home with their kids and be part-time teachers as well as full-time parents. Providing more high-quality family programming makes Helena/Lewis and Clark County more appealing to families moving to Helena, and encourages them to come downtown. It helps reaffirm Helena's presence as a vibrant arts and culture town for all ages.

IRS Department of the Treasury
Internal Revenue Service
P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077394588
June 27, 2019 LTR 4168C 0
51-0185430 000000 00
00040867
BODC: TE

THE MYRNA LOY
MYRNA LOY CENTER
15 N EWING ST
HELENA MT 59601

033917

Employer ID number: 51-0185430
Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated Apr. 23, 2019, about your tax-exempt status.

We issued you a determination letter in April 1976, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(i).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,

Instar Enterprises

Grant Amount: $2000

Organization's Mission: Our mission is to promote the restoration of a person's dignity that may be struggling with substance use disorder and mental health in a safe supportive community environment that is client centered.

Description of Project or Program: It would enable the people we serve to get a better night's rest which is crucial to wellness and recovering from addiction and mental health struggles.

We will progress in offering a quality sleep foundation and the outcomes are better mood, restored health, and overall well being.

The funds would be used to purchase 10 extra long twin mattresses and 10 extra long bed frames with regular legs instead of wheels. Also to purchase 10 sets of cotton sheets for extra long twin beds. 10 platform frames @ $99 = $999 10 mattresses@ 118= $1180 and ten sheet sets @$30=$300. Total project cost: $2479

Expressed Public Benefit to the City of Helena:
Our residents come from the Lewis and Clark Detention Center and often times find themselves among the homeless community in Helena before finding refuge at Hannon House.

Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

INSTAR ENTERPRISE
C/O TERRI RUSSEL
1112 LESLIE AVE
HELENA, MT 59601

Date:
02/02/2021
Employer ID number:
85-3762294
Person to contact:
Name: Customer Service
ID number: 31954
Telephone: 877-829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(vi)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
November 6, 2020
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053717003850

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Letter 947 (Rev. 2-2020)
Catalog Number 35152P

The Angel Fund

Grant Amount: $2000

Organization's Mission: Angel Fund helps K-12 children attending school in the Helena School District that qualify for free/reduced lunch status. We mostly purchase school clothing, winter outerwear, shoes, school supplies, backpacks, calculators, provide field-trip fees and much more so they can be successful in the classroom each year. We also coordinate "Stuff the Bus" each summer helping Helena and surrounding children with school supplies. "Running for Montana's Future" program partners with the Helena Police Department to help students with a pair of athletic shoes promoting healthy physical activity. Resource Officers deliver the shoes to students. Angel Fund awards post-secondary scholarships along with our generous sponsors to graduates at Access to Success, CHS, HHS and PAL each spring based on financial need, academic success and a commitment to "pay it forward" in the future. We are changing the world, one child at a time!

Description of Project or Program: We have already spent $188,276 for students in need since October 2021. We have also awarded $50,000 in scholarships last spring to students to attend college and begin their college journey for a bright future. A total of $238,276 has been spent so kids in Helena can have a better life, higher self-esteem and be school-ready each fall. We have increased our amounts to students: Elementary $150 in clothing/shoes and Middle/High School students receive $200 each. They also can get a backpack full of school supplies and possibly a scholarship if they plan to attend a Montana college or vocational school after graduation. We are helping students that need financial assistance to become our future leaders. So, a grant in any amount, would be helpful, appreciated and needed. All funds that go towards children is a priority . . . that's what we do; change lives.

The outcomes will help fund the over 800 student we are anticipating next year that will need to be school-ready fall 2022 by receiving clothes, shoes, school supplies and classroom supplies required by their teachers. We are making a huge impact and difference in the lives of families living in Helena. We appreciate any donation you are able to award Angel Fund.

We will need $2,000 for zippered binders to help middle school children stay organized and successful. It's a larger expense item that parents are not able to afford, so we provide those at HMS and CRA each fall. Backpacks are purchased at Base Camp (at cost) amount to over $4,000 that we distribute to high school students. Also, $2,000 will help 10 middle/high school students with new school clothes this fall; and $2,000 will also help 13 elementary children with school clothes.

Expressed Public Benefit to the City of Helena:

Sometimes parents have told us they either buy school clothes for their children or pay the rent. We want to take that stress and stigma away from parents and guardians so we can help with clothing, shoes, athletic shoes, and a shiny new backpack full of supplies. Angel Fund changes the dynamics of family situations and helps make a difference.

IRS Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248205449
June 16, 2010 LTR 4168C E0
81-0535130 000000 00
00028161
BODC: TE

THE ANGEL FUND
% MARCIA K WALL
PO BOX 7436
HELENA MT 59604-7436

9426

Employer Identification Number: 81-0535130
Person to Contact: Kim Chambers
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your June 07, 2010, request for information regarding your tax-exempt status.

Our records indicate that your organization was recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in September 2000.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Beginning with the organization's sixth taxable year and all succeeding years, it must meet one of the public support tests under section 170(b)(1)(A)(vi) or section 509(a)(2) as reported on Schedule A of the Form 990. If your organization does not meet the public support test for two consecutive years, it is required to file Form 990-PF, Return of Private Foundation, for the second tax year that the organization failed to meet the support test and will be reclassified as a private foundation.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

0248205449
June 16, 2010 LTR 4168C E0
81-0535130 000000 00
00028162

THE ANGEL FUND
% MARCIA K WALL
PO BOX 7436
HELENA MT 59604-7436

Sincerely yours,

Michele M. Sullivan

Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations I

The Friendship Center

Grant Amount: $2000

Organization's Mission: The mission of The Friendship Center is to be a safe haven for those affected by domestic violence, sexual assault, and stalking and to empower our community to flourish in relationships free from violence.

Description of Project or Program: This grant will provide funding for our 24/7 crisis line. This is one of the most critical services we provide to the community of Helena and can literally be life changing. With the onset of the pandemic, the crisis line has become even more important as it is now the primary way victims reach out for help. Our victim advocates provide hospital resources, crisis intervention counseling, safety planning, and emotional support.

Outside of normal business hours, the crisis line is staffed with volunteers who complete 40 hours of training, including shadowing a staff advocate. This rigorous training prepares them to respond to calls that come in via the crisis line, ensuring they have the skills and understanding needed to respond to complex situations and to mitigate the re-victimization of the crisis line caller. Additionally, there is always a Friendship Center staff person on backup should the crisis line volunteer encounter a situation in which they are unsure how to respond. Even when the call happens at 2 a.m. on Christmas Eve, we have volunteers ready to respond.

Domestic violence, sexual assault, and stalking are pressing concerns impacting our community. Data from the Montana Board of Crime Control indicate that domestic violence continues to be the top reported victimization in Montana. One out of every seven Partner or Family Member Assaults (PFMAs) in Montana occurred in our service area (Lewis and Clark, Jefferson, and Broadwater Counties) in 2019. In all, 42% of all assault offenses in our service area were perpetrated by partners and/or family members. Moreover, in 2019, there were 401 total sex crimes representing 29% of all forcible and non-forcible sex crimes reported in Montana. This is incredibly concerning considering that our service area contains only 8% of the state's population.

Our crisis line also is available to the first responders working with victims of domestic violence, sexual assault, and stalking. TFC and the Helena Police Department, as well as the Lewis and Clark County Sheriff's Office, have a strong relationship and work closely together.

Law enforcement officers throughout our service area and the hospital distribute victim resource packets along with notice of victim rights forms and will put victims in touch with our crisis line advocates.

A crisis often doesn't always occur during normal business hours. Maintaining a 24/7 crisis line ensures that victims can reach out for help when they most need it. Funding will help us ensure that this important community resource continues to be available.

In 2021, we received 1,390 calls to our crisis line from 598 known individuals. This number has increased 29% since 2019, and we expect that trend to continue given overall trends in our community and the statistics we noted above.

We also are spending on average 25% more time on each crisis line phone call. For those in abusive relationships, the resources available have likely shrunk more than ever. Friends may not be able to help like they once could. Childcare is harder to find. Housing is more difficult than ever to secure. Additionally, community resources have become more challenging to access or have disappeared. Our advocates continue to work with each client to define their own success, help to eliminate barriers, and move past the violence. Our clients are resilient, and our staff are experts in leveraging our resources to assist them. The combination of the two results in incredible problem solving.

Expressed Public Benefit to the City of Helena:
The 24/7 crisis line is a lifeline for many of the clients we serve. The Friendship Center serves the tri-county area, with most of our clients residing in the greater Helena area. A very small percentage of our clients come to us from Broadwater and Jefferson Counties.

The Friendship Center also works closely with more than 50 agencies in the area to help our clients access the resources they need. Two of our closest partners include the Helena Police Department and the Lewis and Clark County Sheriff's Office.

"The Friendship Center has a very unique relationship with the community. They provide services that no one else can provide. They are working with victims of domestic and sexual violence on a daily basis. There is no one in the community who can provide those services, paid or unpaid, and the fact that they are providing those services for free is incredibly important to this community," former Police Chief Steve Hagen said.

We also work closely with St. Peter's hospital. Their staff call the crisis line to request an advocate be available when victims of domestic violence or sexual assault are admitted to the emergency room. This not only connects the victim to valuable resources, but it also free up the healthcare providers to take care of the patients' physical need while the advocate can provide emotional support.

IRS Department of the Treasury
Internal Revenue Service

OGDEN UT 84201-0038

In reply refer to: 0441669846
Feb. 10, 2010 LTR 4168C E0
23-7131678 000000 00
00043821
BODC: TE

FRIENDSHIP CENTER OF HELENA INC
1430 N SANDERS ST
HELENA MT 59601-3012

30451

Employer Identification Number: 23-7131678
Person to Contact: AL
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Feb. 01, 2010, request for information regarding your tax-exempt status.

Our records indicate that your organization was recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in October 1971.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Rita A. Leete

Rita A. Leete
Accounts Management II

Family Promise of Greater Helena

Grant Amount: $2000

Organization's Mission: The mission of Family Promise of Greater Helena is to support children and their families as they overcome homelessness and become sustainability independent.

Description of Project or Program: PREVENTION
Homelessness prevention is a proactive solution, as it aims to keep a family stable in their own housing and avoid becoming homeless. We provide case management and one-time financial assistance to pay past-due rent; therefore, preventing eviction and homelessness.
SHELTER DIVERSION
Shelter Diversion supports families experiencing homelessness and seeking shelter to either a) restore housing, or b) identify a safe place to avoid entering shelter. At its core, the practice is trauma-informed, client-centered, and sees homelessness as a crisis that needs to be mediated. We provide case management and temporary financial assistance to secure permanent housing (security deposits, first month's rent).
What services does the Diversion Program provide?

- Mediation services with family/friends and/or their landlord to extend permission to stay for up to 30 days;
- Agency referrals to secure other services, including health evaluation and treatment (physical/mental), job search, housing search, etc.;
- Advocacy with landlords to fight through barriers to housing; and
- Temporary financial assistance to secure permanent housing when needed

PROACTIVE SOLUTIONS
If a family living paycheck to paycheck suffers a major illness, car accident, or job loss, it can immediately destabilize their housing and security. Without one-time financial help, they will be unable to pay their rent, ultimately resulting in an eviction and the forced loss of their home. The cost of a single intervention to keep a family in their home is significantly less than the cost of rehousing them. In addition to the financial cost, the destabilization caused by losing a home can be traumatic for both children and adults. Losing their home can have a negative impact on children's educational outcomes and mental health.

Once a family becomes homeless, rehousing them becomes more difficult. If a family receives an eviction for not paying their rent, it will be on their record, making future landlords less likely to rent to them. They may end up owing large sums of money for legal and lease-breaking fees. Not having a home can also make keeping a stable job and income much more difficult. By stepping in and preventing the loss of a home, we can keep families safe and ensure that kids continue to wake up in their own beds.

PREVENTION & DIVERSION

We are there when a family's homelessness is imminent, and we work to avoid the trauma of a family losing their housing. We do this through:

- Case management and community support
- Rental assistance, security deposits
- Utility support
- Landlord mediation
- Housing location
- Transportation – gas cards, bus passes, and car donations

Keeping families out of shelter is good public policy and good fiscal policy. When families have lost housing and reach out to Family Promise, we provide alternatives to shelter, including:

- Temporary hotel/motel stays
- Payments for rent in arrears, security deposits
- Landlord mediation and housing location
- Creative solutions leveraging a family's strengths

STABILIZATION & ADDITIONAL COMMUNITY SERVICES

Programming after shelter helps families remain housed. These structured graduate programs provide continued support and reduce the risk of a family's re-entry into homelessness. Examples include:

- Tenancy training
- Home ownership
- Financial capability
- Educational initiatives
- Career pathways
- Technology support
- Health and wellness

In addition to the many initiatives and programs available when families reach out to us in crisis, we organize communities to offer:

- Food pantries
- Furniture donation
- Drop-in community centers
- Clothing closets
- Diaper banks
- Holiday gift drives

Expressed Public Benefit to the City of Helena:

Homeless prevention and diversion program benefit the community by reducing shelter needs, and keeping our most venerable children safely housed.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 26 2010

FAMILY PROMISE OF GREATER HELENA
INC
C/O VALERIE A BALUKAS
111 N LAST CHANCE GULCH 3B
HELENA, MT 59601

Employer Identification Number:
27-2482216
DLN:
17053161329030
Contact Person:
RENEE RAILEY NORTON ID# 31172
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
April 2, 2010
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

FAMILY PROMISE OF GREATER HELENA

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

Robert Choi
Director, Exempt Organizations
Rulings and Agreements

Enclosure: Publication 4221-PC

City of Helena, Montana

May 26, 2022

To:	Interim City Manager, Tim Burton
From:	Fire Chief, Jon Campbell
Subject:	Fire Service Workplan Update: Review completions from 2007 planning committee recommendations. Provide recommendation on planning committee for 2022 Master Plan.
Present Situation:	The Fire Service Master Plan has been completed and provided. At Commissioner request, Fire Dept. staff are presenting a plan of steps moving forward.
Proposal/Objective:	It is recommended that the Fire Chief head a planning committee to provide Master Plan synopsis and focused recommendations for prioritization and goal establishment for presentation to the Commission at a future meeting.
Notice of Public Hearing:	Attached

ATTACHMENTS:
Summary of recommendations from 2007

GUARDIAN OF THE GULCH

City of Helena

Fire Service Planning Committee Report to the Helena City Commission

Executive Summary

December, 2007

GENERAL INTRODUCTION

Using an approach that has been used with nearly all of the other city operations, the City brought together a committee to review the Fire Department and it's services. The Fire Service Planning Committee (FSPC) has completed its review. The FSPC used the Lewis and Clark County/City of Helena report developed by consultant ESCi as our initial information source to help the committee understand the Helena Fire Service in general and challenges due to industry changes and Helena's growth. Our recommendations, #1, #2, #3 and #5 address existing needs by strengthening the current organization due to the growth of the community, industry changes and the associated call volume workload. Recommendations #4 and #6 position Helena's "Guardians of the Gulch" for future growth.

OVERVIEW

The Fire Service Planning Committee (FSPC) was established on January 29, 2007 by City Commission Resolution 19440. FSPC was tasked with reviewing:

1. the services currently provided by the Fire Department;
2. service levels within each division of the Fire Department (HazMat, EMS);
3. staffing, equipment and facility needs to adequately provide services; and,
4. sustainable funding source(s).

The FSPC has seventeen members *(Appendix A)*, appointed by the City Commission to represent the community as a whole. Accordingly, members are from a variety of backgrounds, affiliations, and interests, with an emphasis on diversity.

MEETINGS

The FSPC had twelve two-hour meetings, which were open to the public, from April through November 2007. The United States Forest Service provided the services of Amy Teegarden as Facilitator for the meetings.

PROCESS

The FSPC used an open discussion format to work through its process. The FSPC:

- first focused upon the "what and why" of current operations and standards;
- followed by questioning whether current operations and standards still provide the best service option(s);
- concluded by reviewing the most economic and effective way to provide and fund the recommended service levels.
- recommendation summary information is included in (*Appendix B)*

The FSPC used authoritative documentation in their review process:

1. Lewis & Clark County and City of Helena Fire Protection Service Review of August 2006 conducted by Emergency Services Consulting inc.

2. Several comparative surveys of the other major fire departments throughout Montana.
3. Several national standards documents. (i.e. OSHA, NFPA, NREMT, etc.)

SERVICES REVIEWED

The FSPC reviewed the primary service areas provided by the City and area fire departments. These primary service areas fall into the following categories:

- Fire Suppression (structure, wildland and aircraft)
- Fire Prevention, Code Enforcement and Fire Safety Public Education
- Emergency Medical Non-Transport Service (EMS)
- Hazardous Materials (HazMat) Response (technician and operational levels)
- Mutual Aid (formal cooperative relationships with Rural Volunteer Fire Departments)

The FSPC concluded that all the above listed primary services are germane to fire service in general, and especially pertinent to the City of Helena Fire Department. The FSPC also supports the current tiered EMS response model in partnership with St. Peter's Ambulance services and the current HazMat technician level services. Both are deemed necessary to provide an enhanced margin of safety for Helena's citizens. Additionally, the FSPC concludes that the Helena Fire Department is dependent on firefighter callback as well as Rural Fire Mutual Aid to staff a major incident. Therefore the FSPC recommends the City Commission add funding to the fire department budget to assist the department in developing and strengthen firefighter training, county-wide cooperative fire response planning, and county-wide incident management training.

FUNDING OPTIONS

The FSPC spent considerable time reviewing the methods available to Montana cities to fund public safety agencies, including but not limited to:

1. **Public Safety Mill Levy** (voter approval required)
   The Montana Legislature provided the Public Safety Levy as the vehicle to use to add additional funding for public safety agency operations.
2. **General Obligation Debt** (voter approval required)
   This is a voter approval option that is considered the primary option for capital facility and equipment acquisition.
3. **Fees for Services** (No voter approval required)
   Fees are a primary option when considering funding equity. Property taxes are not paid by tax-exempt entities that receive a significant benefit. However, establishing a public safety fee for service, which would include the tax-exempt entities, is very difficult under Montana laws. Additionally, fees carry a tremendous negative aspect. The FSPC concluded fire fees were not an adequate method to fund the Fire Department. The FSPC

supports the idea of continuing to work with tax-exempt entities to find an equitable solution the funding issue.

4. **Impact Fees** (No voter approval required)
   Impact fees cannot be used to fund ongoing operating costs. However, they may readily be used in conjunction with General Obligation Debt as a means of reducing the tax levy to repay such debt.

FIRE SERVICE PLANNING COMMITTEE RECOMMENDATIONS

Fire Department Priority Recommendations

While the FSPC used an open discussion format throughout its review it was agreed upon to use a secret ballot to vote on the final recommendations to the commission. Not all of the committee members voted. The State of Montana representative abstained and three members did not attend enough meetings to make an informed vote. City staff did not participate in the voting.

Priority considerations and FSPC recommendations are as follows:

1. **Additional Firefighters:** Add 9 firefighters to better staff fire suppression needs.
   Vote - Unanimous *$544,833 Annual Cost Estimate*

   a. Issue - Add nine firefighters to existing operations to allow the fire crews at fire stations #1 and #2 to work within an adequate and consistent operating force of four firefighters each and assures consistency to the emergency response. Secondly, it will allow the Battalion Chief of each shift to function as a full-time supervisor, not the dual role (firefighter and supervisor) they currently do. By eliminating the dual role we will be enhancing the fire operation by establishing clear roles and appropriate skills and competency, in addition to making the firefighter's job safer.

   b. Funding – The FSPC recommends a on-going Public Safety Levy

2. **Additional Fire Inspector:** Hire 1 new fire inspector for the fire prevention bureau.
   Vote – 9 to 1 in favor *$70,511 Annual Cost Estimate*

   a. Issue: This new position will manage the Company Inspection Program and focus upon small retail/office inspections. This increase will allow the current inspector to focus on the higher risk occupancies.
   b. Funding - The FSPC recommends an on-going Public Safety Levy

3. Capital Reserves for Buildings: Fire Station #2
Vote - Unanimous *$107,762 Annual Cost Estimate for ten years*

a. Issue - The City's east-side station (Station #2) is in desperate need of an upgrade and remodel in order to better meet the current and future service needs provided from that location.
b. Funding - The FSPC recommends that funding would be sunset with the completion of the loan.

4. Capital Replacement Program: Establish an equipment replacement program
Vote – 8 to 2 in favor *$245,000 Annual Cost Estimate*

a. Issue - The FSPC believes it is prudent to establish an ongoing funding mechanism for replacement of capital equipment and current facility repair and upkeep.
b. Funding - The FSPC recommends an on-going Public Safety Levy

5. City Commission supported Response Times: The City Commission should direct the Fire Chief to establish a department-wide response time. *No Costs*
Vote – Unanimous

a. Issue – The FSPC believes it beneficial for fire department operations to establish an official response benchmark. Such action allows the community and the department to measure expectations and performance. A 90 % attainment level is also recommended.
b. Funding – no levy is needed.

6. Future Station Needs – Third Fire Station: Begin preliminary steps for a future fire station.

a. Issue -Development trends show an additional City of Helena fire station will be needed in approximately 5 years. Preliminary planning steps are recommended to begin at this time:
1. Identify complimentary partnerships for a multi-purpose public safety facility.
2. Location Determination
3. Facility / Station Design
4. Preparatory staff hiring and training
5. Sustainable Funding Source

b. Funding - Funding for preliminary steps should be included in the General Fund (pending Commission approval)

Concurrent Public Safety Recommendation-

The FSPC has only reviewed the fire service. After reviewing and examining the Fire department's current situation and along with our recommendation for a Public Safety Levy, we encourage the City Commission to look at the community's other public safety needs before conducting a voter approved levy.

Appendix A

Fire Service Planning Committee

Facilitator

Amy Teegarden,	U. S. Forest Service

Public Representatives

Sandy Oitzinger	City Commissioner
Ed Tinsley	County Commissioner
Cheryl Liedle	Sheriff
Ellen Bell	Helena Citizens Council
Bob Drake	Rural Fire Council Representative
Bret Ruby	U. S. Forest Service
Cory O'Brian	Firefighter's Union
Dan Herrera	Fort Harrison
Fred Lubke	Citizen at Large
John Solheim	St. Peter's Hospital
Marv Eicholtz	Montana Dept. of Administration
Rick Hays	Retired Businessman
Ron Mercer	Helena Regional Airport

City Staff

Tim Burton	City Manager
Steve Larson	Fire Chief
David Nielsen	City Attorney
Tim Magee	Administrative Services Director

County Staff

Ron Alles	County Manager

News Media

Larry Kline	Helena Independent Record

City of Helena, Montana

June 21, 2022

To: Interim City Manager, Tim Burton

From: Fire Chief, Jon Campbell
Administrative Coordinator, Stephanie Crook

Subject: Wildland Urban Interface Update

Present Situation: See attached.

Proposal/Objective: N/A

Notice of Public Hearing: Attached

ATTACHMENTS:
Wildland Urban Interface Agency Summary

Fire Department
300 Neill Avenue
Helena, MT 59601

Phone: 406.447.8472
Fax: 406.447.8467
Email: helenafiredepartment@helenamt.gov

helenamt.gov

Wildland Urban Interface Interagency update meeting was held on 2/23/2022. Below is a summary of the consensus points in the meeting followed by each agency's updates and points of discussion from the meeting.

Summary:

The group consensus was that public education, fuel mitigation, and structural hardening are the most likely to be effective and therefore most important areas of emphasis to improve our community wildland urban interface risk profile. Rapid initial attack is vital in catching an actual fire incident before it grows beyond the capabilities of immediately available resources. It was also acknowledged that every agency with the responsibility of fire suppression struggles with staffing inadequacy. Mutual aid has a demonstrated history of being an integral component of our shared community response model. It is also recognized that fire season duration and intensity are trending longer and more severe. Additional training(s) and exercises designed to test response plans will enhance interagency capacities for wildland urban interface events.

Helena Fire Dept., Jon Campbell – Fire Chief

- 9 daily personnel staff 2 stations for Fire Suppression
- HFD has applied for an AFG grant to upgrade a Type VI engine to a Type III to improve structure protection capabilities
- A newly created Fire Inspector position will have duties related to risk reduction and public education in the WUI
- A mailer containing information on evacuation routes and assembly points is being put together for City residents

Helena Police Dept., Brett Petty – Police Chief

- Police Dept. relies on Sheriff's Office for evacuation expertise acknowledging future training opportunities to strengthen this dept. function
- *Smart 911* is a "reverse paging" option to communicate to certain target audiences in the event of evacuation
- Evacuation route signage is in conversation stage

10-Mile/South Helena Forest Restoration Collaborative, Joe Cohenour – Chairman

- The ordinance creating this Collaborative has termed out. Due to litigation in the pertinent geographic area, the Forest Service has not pushed for the re-establishment of this Collaborative
- It may be possible that the interest of this geographic area may be addressed via another area Collaborative
- Some timber harvesting is still underway in this area

City of Helena Public Information Officer, Jacob Garcin

- Evacuation map for the city is a work in progress
- Working with County DES on backup coverage for internal communication

City of Helena Park Dept., Kristi Ponozzo – Director, Brad Langsather – Open Lands Manager

- Roughly 2,000 acres of open lands within City limits with 1,700 of those timbered. Roughly 90% of this area has received first treatment of fuels mitigation and maintenance of approx. 15% of the older treated areas
- This is a 30-year process, starting with 900 trees/acre with a goal of 75 trees/acre
- This effort has been in coordination with neighboring agencies: DNRC, BLM, USFS, and L&C County

L&C County Sheriff's Office, Brent Colbert – Undersheriff

- Due to turnover at the S.O., additional training for evacuations is needed
- S.O. would like more fire service representation at evacuation training
- At any given time S.O. is limited to an initial response for evacuation to as few as 10 individuals
- S.O. members provide single notice of evacuation and require fire suppression capability to accompany creating a necessary but unfortunate level of resource limitation

Project Manager Fire Safe Helena, Rural Fire Council Board Member, Wolf Creek Fire Chief, Rocky Infanger

- Fire Safe Helena will be starting fire prevention messaging in the spring
- Education and Prevention are vital
- Grant opportunities exist through Fire Safe Helena for property owners wishing to improve their properties' fire resiliency

L&C County Disaster and Emergency Services, Alexa Noruk – DES Coordinator

- Primary responsibility is preparedness planning with a variety of plans in an ongoing effort of being consolidated and updated
- DES is the Point of Contact for escalating incidents requiring additional support i.e.:
    - Resource requests
    - PIO's and social media
    - Peace Officers' Assoc.
    - Missoula's All Hazard Incident Management Team
    - Emergency Operations Center
    - Red Cross
- Upcoming Earthquake exercise will help in testing some of the same components that would be in place on a major WUI event

Montana DEQ, Kelly Dorsi – Air Quality Meteorologist

- Primary function is to manage smoke impact and issue burn permits for major and minor users including monitoring air quality across the state
- Trends observed: wildfire season is getting longer and starting earlier. More days are being affected by wildfire smoke.
- It is a balance between smoke impact and safe/timely issuance of permits for controlled burns

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Jefferson County Emergency Services, Doug Dodge – Director

- Updating the Quad County Plan
- Reverse notifications, evacuations, and communications have some jurisdictional differences as compared to L&C County counterparts
- Jefferson County has limitations in quantity of mutual aid resources it provides and is reliant on L&C County based resources for support

USDA, Mike Kaiser – Fire Management Officer

- Stressed the importance of interfacing with public who may be affected by prescribed burning smoke
- Typically, Forest Service has high rate of success during initial attack especially with quantity of air assets available to the immediate area
- "Out of season" or early season fires can be difficult with resource allocation issues
- Approx. 96,000 hand piles built last year with nearly 40,000 burned over winter burn season, with no district in the US does more piling than MT
- There are contracts planned this year for South Hills area fuel mitigation
- Contact your Fire Management Office for area specific updates (Rodney Ridge, Lazy Man, Jericho, etc.)