



City of Helena

ADMINISTRATIVE MEETING

May 28, 2025 - 4:00 PM

City - County Building Room 326 / Zoom Online Meeting; <https://zoom.helenamt.gov/c/36053471/publicmeetings>

AGENDA

1. **Call to Work Session, introductions**
 - a. Meeting Rules of Procedure
2. **Board & Committee Update**
 - a. Board Appointment Review
3. **Recommendations from the Helena Citizens Council**
4. **City Manager's Report**
5. **Commission comments, questions**
6. **Department Reports**
 - a. Budget Amendments for Fiscal Year 2025 Budget Appropriations
 - b. FY26 Tourism Business Improvement District Workplan and Budget Presentation
 - c. FY26 Business Improvement District Workplan and Budget Presentation
 - d. FY26 Budget Discussion - Sustainability Projects/Sidewalk Funding
7. **Public Comment**
8. **Commission discussion and direction to the City Manager**
9. **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.

Rules of Procedure:

Good evening and welcome to the City of Helena City Commission Meeting. We appreciate your attendance and participation. To ensure our meetings are productive and respectful, we ask everyone to adhere to the following guidelines:

Decorum and Expectations:

- Please maintain respect towards the Commission, presenters, and other participants. All participants are expected to avoid using profanity or hostile language. Inappropriate behavior or continued disruptions may result in action by the Commission.

Zoom Participation Decorum:

- Please keep your microphone muted unless you are speaking to minimize background noise.
- Use the “Raise Hand” feature if you wish to speak and wait to be recognized by the chair.
- If available to you, please ensure your video is on if you are speaking, to maintain transparency and engagement.
- Participants joining by telephone may raise their hand by pressing *9 and mute/unmute themselves using *6.

Public Comment:

- Public comments will be recognized only during designated periods by the presiding officer.
- State your name for the record when recognized to speak.
- **Each speaker will be given two minutes to make their comments. At two minutes, you will be asked to begin wrapping up. Please keep comments respectful, concise, and non-repetitive.**
- Individuals may speak once per agenda item and during the general comment period at the end of the meeting.
- **Comments will first be taken from people present in the room, followed by online participants.**
- Online participants may also use the Q&A feature to submit written comments.
- **If you ask a question during public comment, it will be recorded but you likely will not receive an answer. The purpose of public comment is for you to share your thoughts on a topic, not ask questions to City staff.**
- Members of the Commission may ask clarifying questions during the comment period.
- **All comments will be recorded in the permanent record. Formal statements can be submitted via the General Public Comment form on the City’s website. Comments on public engagement pages and media are public records under MCA 2-6-1003.**

Montana’s Right to Participate and Right to Know Laws:

- In accordance with Montana’s right to participate law (MCA 2-3-103), the public is encouraged to engage in the decision-making process.
- The right to know law (MCA Article II Section 10) ensures that all meetings are open to the public and that records are accessible. We strive to maintain transparency and accountability in all our proceedings.

Public Meetings and Recordings:

- **Please be aware that all public meetings and recordings are considered public records. These records are accessible to the public at any time.**
- **By participating in this meeting, you acknowledge that your comments and participation will be part of the public record.**

Thank you for your cooperation and for contributing to a respectful and effective meeting.

May 28, 2025

TO: City Commissioners
FROM: Mayor Wilmot Collins
SUBJECT: Board Appointments

I am recommending the following board appointments:

ADA Compliance Committee	Appointment of Michael Bassett to an interim term on the ADA Compliance Committee as a Medical Field Representative. Interim term expires September 1, 2027.
Helena Regional Airport Board of Adjustment	Appointment of Bryan Costigan to a first term on the Helena Regional Airport Board of Adjustment. Term expires October 1, 2027.
Helena Public Art Committee	Appointment of Christina Barbachano to an interim term on the Helena Public Art Committee. Interim term expires December 31, 2025.
Urban Renewal District TIF Advisory Board	Appointment of Bob Goodwyn to a first term on the Urban Renewal District TIF Advisory Board as an Owner of Property within the Railroad District. Term expires December 31, 2026.

*Appointees can reapply for full terms following the completion of the Interim Appointment.

City of Helena, Montana

5/28/2025

To:

Tim Burton, City Manager

From:

Sheila Danielson, Finance Director

Subject:

Budget Amendments for Fiscal Year 2025 Budget Appropriations

Present Situation:

The City of Helena Commission adopted the final budget for fiscal year 2025 by Resolution No. 20964 on August 26, 2024.

Budget amendments are needed for the following purposes:

- Fund 2851 (Support Services Division) - \$150,000 for wages and benefits. Original budget estimates are not adequate to cover overtime, contracted wages, and enhanced benefit selections.
- Fund 4504 (Sidewalk Program) – \$74,000 - Program funding received in Fiscal Year 2024 carried over to expenditures incurred in Fiscal Year 2025.
- Fund 1000 (General Fund) - \$20,000 – Transfer of funds to the Golf Fund using General Fund contingency cash reserves for the purchase of an ADA Golf Cart. Commission gave consensus to use contingency cash reserves at the April 21, 2025 City Commission Meeting.
- Fund 5010 (Golf Fund) - \$20,000 – Increase appropriations for the purchase of an ADA Golf Cart.

Background Information:

The Commission adopts the legal level of spending authority at the Fund level. If appropriations are expected to exceed the legal level of spending authority, a budget amendment is necessary.

Per MCA 7-6-4006 (4) The governing body may amend the budget during the fiscal year by conducting public hearings at regularly scheduled meetings. Budget appropriations providing for additional appropriations must identify and fund the reserves, unanticipated revenue, or previously unbudgeted revenue that will fund the appropriations.

Proposal/Objective:

Consider bringing a budget amendment to the Commission on June 16, 2025 to amend the fiscal year 2025 budget.

Advantage:

By increasing appropriations through a budget amendment, the City of Helena will comply with legal levels of spending at the Fund level for fiscal year 2025.

Notable Energy Impact:

N/A

Disadvantage:

N/A

Quasi-Judicial Item:

False

Notice of Public Hearing:

False

**Staff Recommendation/
Recommended Motion:**

N/A - Information only

Fiscal Year Ending June 30, 2025

Fund Number	Fund Name	Original Budget Amount	Requested Amended Budget	Approved Final Amended Budget	Source of revenue/reserves to cover amendment	Date Approved by Governing Body	Comments
2851	Support Services Division	2,137,402.00	150,000.00	2,287,402.00	Fund Cash Reserves	Monday, June 16, 2025	Original estimate of appropriations not adequate for wages/ benefits
4504	Sidewalk Program	150,000.00	74,000.00	224,000.00	Fund Cash Reserves	Monday, June 16, 2025	Funding received from prior year carried over for program costs in current year
1000	General Fund	30,525,907.00	20,000.00	30,545,907.00	Fund Cash Reserves	Monday, June 16, 2025	Expenditures from reserves approved by consensus at Commission meeting on April 21, 2025
5010	Golf Fund	2,602,080.00	20,000.00	2,622,080.00	General Fund Transfer	Monday, June 16, 2025	Purchase of equipment funded by General Fund
	Totals:	35,415,389.00	264,000.00	35,679,389.00			

Page 5 of 39 Time: _____

Resolution Number: _____

Approval Date: _____

Governing Body Signature: _____

Date: _____

Submit a copy of the amendment to the City/Town Clerk or County Clerk and Recorder to update the final budget in the accounting system and email to DOA LGSB to include with your budget on the public transparency site.

Montana Code Annotated - Title 7. Local Government - Chapter 6. Financial Administration - Part 40. Local Budget Act

MCA 7-6-4005. Expenditures limited to appropriations. (1) Local government officials may not make a disbursement or an expenditure or incur an obligation in excess of the total appropriations for a fund. (2) A local government official who violates subsection (1) is liable for the amount of the excess disbursement, expenditure, or obligation personally.

MCA 7-6-4006. (4)The governing body may amend the budget during the fiscal year by conducting public hearings at regularly scheduled meetings. Budget amendments providing for additional appropriations must identify the fund reserves, unanticipated revenue, or previously unbudgeted revenue that will fund the appropriations.

MCA 7-6-4012. Fee Based Budgets -adjustable appropriation. (1) In its final budget resolution, the governing body may authorize adjustments to appropriations funded by fees throughout the budget period. Adjustable appropriations are: (a) proprietary fund appropriations; or (b) other appropriations specifically identified in the local government's final budget resolution as fee-based appropriations. (2) Adjustments of fee-based appropriations must be: (a) based upon the cost of providing the services supported by the fee; and (b) fully funded by the related fees for services, fund reserves, or nonfee revenue such as interest. **Note: Ensure your budget resolution authorizes amendments to fee-based budgets.*

MCA 7-6-4021 Notice of preliminary or amended budget. (1) The governing body shall cause a notice of a public hearing on the preliminary or amended budget to be published. The notice must: (a)provide that the governing body has completed its preliminary annual budget for the ensuing fiscal year or intends to amend its annual budget; (b) state that the budget or budget amendment has been placed on file and is open to inspection in the county or municipal office designated in the notice; (c) designate the date, time, and place of the meeting at which the governing body will meet for approving a final budget or amended budget and making appropriations; and; (d) state that any taxpayer or resident may appear at the meeting and be heard for or against any part of the proposed budget or budget amendment. (2) The publication requirements must conform to the provisions of 7-1-2121 for a county or 7-1-4127 for a municipality.

MCA 7-6-4030. Final budget — resolution — appropriations. (1) The governing body may amend the preliminary budget after the public hearing and after considering any public comment. (2) The amended budget constitutes the final budget. The final budget must be balanced so that appropriations do not exceed the projected beginning balance plus the estimated revenue of each fund for the fiscal year. (3) The governing body shall adopt the final budget by resolution. The resolution must: (a) authorize appropriations to defray the expenses or liabilities for the fiscal year; and (b) establish legal spending limits at the level of detail in the resolution. (4) The effective date of the resolution is July 1 of the fiscal year, even if the resolution is adopted after that date.

MCA 7-6-4031. Budget amendment procedures. (1) The final budget resolution may authorize the governing body or a designated official to transfer appropriations between items within the same fund. (2) The annual budget appropriations may be amended as provided in 7-6-4006(3) and 7-6-4012. (3) Except as provided in 7-6-4006, 7-6-4011, 7-6-4012, 7-6-4015, and 7-6-4032 or in the case of an emergency under Title 10, chapter 3, a public hearing is required for an overall increase in appropriation authority.

MCA 7-6-4032. Emergency expenditures. (1) Emergency budget appropriations must be adopted by two-thirds of the members of a governing body who are present at a meeting. (2) Emergency expenditures are limited to and must be charged to the adopted emergency budget appropriations. (3) The governing body may submit the question of funding emergency warrants at an election as provided by law.

RESOLUTIONS OF THE CITY OF HELENA, MONTANA

RESOLUTION NO. _____

A RESOLUTION AMENDING THE REVISED FINAL BUDGETS, BUDGET AUTHORITIES, AND APPROPRIATIONS FOR FISCAL YEAR BEGINNING JULY 1, 2024 AND ENDING JUNE 30, 2025 FOR THE CITY OF HELENA, MONTANA, BY AMENDING RESOLUTION NO. 20964 TO INCREASE APPROPRIATIONS BY \$264,000

WHEREAS, by Resolution 20964 adopted August 26, 2024, the City of Helena adopted the final budget for fiscal year 2025;

WHEREAS, Section 7-6-4006(4), MCA, permits the City Commission to amend the budget;

WHEREAS, Section 7-6-4031, MCA, requires a public hearing before any increase in overall budget authority can be approved by the City Commission;

WHEREAS, budget amendments are needed for the following purposes:

- Fund 2851 (Support Services Division) - \$150,000 - additional wages and benefit payments. Original budget estimates are not adequate to cover overtime, contracted wages and enhanced benefit elections.
- Fund 4504 (Sidewalk Program) - \$74,000 - Program funding approved and received in prior fiscal year were carried over to expenditures in fiscal year 2025.

RESOLUTIONS OF THE CITY OF HELENA, MONTANA

Resol.

- Fund 1000 (General Fund) - \$20,000 - Transfer funds to the Golf Fund using General Fund contingency cash reserves for the purchase of a Golf Cart that complies with Americans with Disabilities Act (ADA). The City Commission gave consensus to use contingency cash reserves for this purpose during the April 21, 2025 City Commission meeting.

- Fund 5010 (Golf Fund) - \$20,000 - Increase appropriations to purchase an ADA Golf Cart.

WHEREAS, Section 7-6-4006(4), MCA, also requires the City Commission to identify the fund reserves, unanticipated revenue, or previously unbudgeted revenue that will fund the additional appropriations;

WHEREAS, a public hearing was held on June 16, 2025, in the Commission Chambers at 316 North Park Avenue in Helena, Montana, at 6:00 P.M.; and

WHEREAS, it appears to be in the best interests of the City of Helena and the inhabitants thereof that the Helena City Commission make the budget amendments as specified below.

NOW, THEREFORE, BE IT RESOLVED BY THE COMMISSION OF THE CITY OF HELENA, MONTANA:

RESOLUTIONS OF THE CITY OF HELENA, MONTANA

Resol.

Section 1. The Helena City Commission hereby amends the Revised Fiscal Year 2025 budget by amending Resolution No. 20964 and authorizes the following changes to increase appropriations in its revised fiscal year 2025 budget, as shown below:

1. Additions: The following projects and amounts are added to the fiscal year 2025 budget:

- a. Fund 2851 (Support Services Division)- \$150,000 - revised wage and benefit adjustments.
- b. Fund 4504 (Sidewalk Program) - \$74,000 - project costs for sidewalk loan program.
- c. Fund 1000 (General Fund) - \$20,000 - transfer to Golf Fund for purchase of ADA cart.
- d. Fund 5010 (Golf Fund) - \$20,000 - purchase of ADA Golf Cart.

2. The above increased appropriations will be funded by the following:

- a. Fund 2851 (Support Services Division)- \$150,000 - fund cash reserves.
- b. Fund 4502 (Sidewalk Program) - \$74,000 - Fund cash reserves - funding deposited in prior fiscal year for current year program costs.

RESOLUTIONS OF THE CITY OF HELENA, MONTANA

Resol.

c. Fund 1000 (General Fund) - \$20,000 - General Fund
Contingency cash reserves.

d. Fund 5010 (Golf Fund) - \$20,000 - Transfer from
General Fund contingency cash reserves.

**PASSED AND EFFECTIVE BY THE COMMISSION OF THE CITY OF HELENA,
MONTANA, THIS 16th DAY OF JUNE, 2025.**

MAYOR

ATTEST:

CLERK OF THE COMMISSION

Support Services Division (Fund 2851)

Cash Flow Statement

	FY22 ACTUALS	FY23 ACTUALS	FY24 ACTUALS	FY25 ADOPTED	FY25 PROJECTED	FY26 PROPOSED
REVENUES:						
Licenses and Permits	9,770	9,030	1,925	8,500	1,500	1,000
Intergovernmental Revenues	1,594,106	1,653,098	1,752,639	1,831,222	1,826,222	1,924,907
Charges for Services	4,838	4,693	21,511	6,500	21,900	12,500
Investment Earnings	2,203	23,577	29,305	20,000	10,000	20,000
Interfund Transfers In	9,216	3,697	2,048	2,307	2,307	-
Total Revenues	1,620,133	1,694,096	1,807,428	1,868,529	1,861,929	1,958,407
EXPENSES:						
Total Personnel	1,353,018	1,683,809	1,789,658	1,968,877	2,119,180	2,036,852
Supplies & Materials	14,435	5,341	7,089	15,050	10,550	12,050
Purchased Services	75,138	87,293	80,362	78,421	79,021	89,945
Intra-City Charges	-	-	-	-		
Fixed Charges	30,262	34,499	34,181	32,005	35,548	36,340
Total Operating	119,834	127,133	121,632	125,476	125,119	138,335
Total Internal Charges	29,100	35,252	35,623	43,049	43,049	47,758
Total Expenditures	1,501,952	1,846,194	1,946,913	2,137,402	2,287,348	2,222,945
Revenue Over(Under) Expenditures	118,181	(152,099)	(139,485)	(268,873)	(425,419)	(264,538)
Beginning Cash	804,957	923,138	771,039	631,554	631,554	631,554
Ending Cash	923,138	771,039	631,554	362,681	206,135	367,017
Operating Reserve	246,896	303,484	320,040	351,354	376,002	365,416
Budgeted Reserve for Capital	676,242	467,555	311,514	11,327	(169,867)	1,601

Sidewalk Programs Capital (4504)**Cash Flow statement**

	FY23	FY24	FY25	FY25	FY25	FY26
	<u>ACTUALS</u>	<u>ACTUALS</u>	<u>ADOPTED BUDGET</u>	<u>AMENDED BUDGET</u>	<u>PROJECTED</u>	<u>PROPOSED</u>
REVENUES:						
Other Settlements (Loan repayments)	-	3,927	-	-	10,000	12,000
Transfer in - Sidewalk SID Fund	-	43,559	-	-	-	-
Interfund Transfr In Gen Fund	-	150,000	150,000	150,000	150,000	150,000
Total Revenue	-	197,486	150,000	150,000	160,000	162,000
EXPENSES:						
Other Contracted Services	45,947	77,716	150,000	150,000	224,000	150,000
Total Expentitures	45,947	77,716	150,000	150,000	224,000	150,000
Revenues Over(Under) Expenditures	(45,947)	119,770	-	-	(64,000)	12,000
Beginning Cash	-	(45,947)	73,822	73,822	73,822	9,822
Ending Cash	(45,947)	73,822	73,822	73,822	9,822	21,822

City of Helena, Montana
Commission Administrative Meeting

May 28, 2025

To: Mayor Collins and the Helena City Commission

From: Sheila Danielson, Finance Director
Andrea Optiz, Executive Director, Helena Tourism Business Improvement District

Subject: Helena Tourism Business Improvement District FY25 Workplan and Budget Presentation

Present Situation:

The Helena Tourism Business Improvement District (TBID) is presenting its FY26 Budget and Workplan for consideration to the City Commission. Their annual draft budget proposes expenses of approximately \$677,270 which is recovered from assessing lodging facilities within the district which was voted in by the hoteliers. The Helena Tourism Alliance is the administrative organization for the TBID.

The mission of the TBID is to promote and preserve Helena as a unique destination in order to increase occupancy for lodging facilities thereby creating vibrant growth in the local economy.

Background Information:

Resolution No. 19644, passed April 20, 2009, created a Tourism Business Improvement District ("District") to promote tourism, conventions, trade shows, and travel to the City of Helena. The City expanded the District on August 22, 2011, by Resolution No. 19871; Resolution No. 20473, passed August 27, 2018, re-created the District for another ten (10) year period.

In order to defray the costs of the proposed workplan and budget, it is necessary for the City of Helena to levy an assessment on all property within the District.

The assessment for Fiscal Year 2026 on all lodging facilities used for providing overnight stays within the District is proposed to be computed by multiplying the number of rooms occupied from July 1, 2024, through June 30, 2025, for each lodging facility within the District, as reported by the District, by two dollars (\$2.00).

<u>Proposal/Objective:</u>	Consider the Helena Tourism Business Improvement District's Proposed FY26 Workplan and Budget.
<u>Advantage:</u>	Acceptance of the TBID FY26 Workplan and Budget will allow staff to bring the Resolution of Intention and a motion to set a public hearing at the June 2, 2025 Commission meeting.
<u>Notable Energy Impact:</u>	N/A
<u>Disadvantage:</u>	N/A
<u>Notice of Public Hearing:</u>	N/A
<u>Staff Recommendation/ Recommended Motion:</u>	N/A – Information only



Helena Tourism Business Improvement District Fiscal Year 2026 Work Plan

1 ORGANIZATION SUMMARY

The TBID is funded by a room assessment that the hoteliers voted into action to help market Helena. The TBID operates under the direction of the TBID Board of Directors and reports to the City of Helena.

The Helena Tourism Alliance (HTA) is the administrative organization of the TBID. The TBID Board meets monthly on the second Wednesday of every month at 1:30 pm in the Reeder's Alley Conference Center, 120 Reeder's Alley.

The Helena Tourism Business Improvement District (TBID) continues to base our marketing and product development strategies on our mission.

Helena TBID Organizational Mission

To promote and preserve Helena as a unique destination to increase occupancy for lodging facilities thereby creating vibrant growth in the local economy.

Helena TBID Organizational Vision

The Helena TBID is the premier partner and leading advocate for Helena's quintessential experiences and profound opportunities.

Helena TBID Organizational Values

- Integrity
- Innovation
- Communication
- Participation
- Effective Teamwork

Helena TBID Organizational Goals

1. Community Partnerships: Build relationships with the community and make a coordinated effort to communicate effectively.
2. Market Helena: Develop a marketing plan that builds awareness, educates, and utilizes extension partnerships.
3. Big Picture: Explore additional partnership opportunities by identifying unique travel experiences utilizing unconventional ideas.
4. Organizational Development: Create training to develop innovative board members, staff, and stakeholders to enhance participation.

2 INTRODUCTION

The role of Destination Organizations, like Visit Helena, continue to evolve. Destination management calls for a coalition of many organizations and interests working towards a common goal, ultimately being the assurance of the competitiveness and sustainability of the tourism destination.

There have been great strides made with the City of Helena and other community partners working cohesively on a unified brand and messaging and a strategic roadmap. We will continue to work to strengthen community vitality; competitive positioning; and ensure the long-term viability of Helena.

Collaborative management of our destination will help to avoid overlapping functions and duplication of efforts in promotion, visitor services, training, business support, and resource management/protection.

Visit Helena will continue to work closely with community organizations, such as the City of Helena, Helena Area Chamber of Commerce and Convention and Visitors Bureau; Helena

Business Improvement District; Montana Business Assistance Connection; and many additional stakeholders.

One of the ultimate goals of tourism is to increase quality of life for residents of a destination. Visitation boosts economic impact. When the Helena area economy thrives, the resident experience also thrives, we understand it is a delicate balance. Visit Helena will work to identify & support destination product development opportunities as well as sustainability and stewardship of the destination.

In a world consumed by possessions rather than experiences, the Visit Helena team strives to amplify the voices of those working toward a welcoming and balanced Helena, reinvesting in our community for future generations while maximizing tourism dollars for a thriving city.

We will work on initiatives in destination management and marketing that focus on the **economic**, **social**, and **environmental** health of our town.

3 LEISURE RECRUITMENT

The TBID's overall leisure marketing strategy is to increase year-round visitation targeting regional, national, and international visitors. Strategies and goals will continue to be assessed and expanded and will focus on creative marketing to reach new and existing travelers.

The TBID will closely monitor opportunities for consumer trade shows including the Denver Travel and Adventure Show, Seattle Travel and Adventure Show, and The Outdoor Adventure & Travel Show in Calgary, among others.

The TBID will work with regional and state partners to monitor the international landscape, while continuing to foster partnerships with domestic and international tour operators. In addition, we will weigh the option to participate with other Montana DMOs in international travel recruitment shows like IPW, the travel industry's premier international marketplace and the largest generator of travel to the U.S.

4 YELLOWSTONE & GLACIER NATIONAL PARKS

For people exploring Montana's National Parks, Helena offers the perfect half-way destination. Helena is 178 miles from the west entrance of Yellowstone National Park and 187 miles from the eastern portion of Going to the Sun Road in Glacier National Park, making us the perfect location to overnight and/or spend several days.

Helena will continue to position the community as the half-way destination between the parks and highlight that traveling this route offers fabulous scenery; some of Montana's most special heritage places; and an opportunity to relax and take a break.

Our social media, SEO, and web content will also focus on Helena, Montana's Hometown, as a great place for starting a Montana vacation, redesigning the Between the Parks message as Montana's Destination. Helena is centrally located and should be the launching point for visitors to explore Montana's true heritage.

5 THE VISITOR EXPERIENCE

Designing a quality visitor experience has been a high priority of Visit Helena. The TBID will continue to work to align our destination's stakeholders, businesses, and front-line employees to support tourism and assist in facilitating and meeting visitor expectations. Ensuring visitors have positive experiences will directly impact the future of tourism in Helena, Montana.

The goal is to successfully align the following sectors because we all benefit from a positive visitor experience:

- Hotel / Lodging
- Attractions
- Downtown Merchants
- Restaurants
- Shopping / Retail
- Citizens / Volunteers

Making sure travelers feel welcomed and enjoy their stay will continue to be a major priority. We will work to determine streamlined ways to offer Front-Line Training to help those working with visitors every day be informed about what Helena has to offer.

Visit Helena understands that the visitor experience plays one of the most important roles in maintaining and growing visitation at a destination. Exceptional service leads to repeat visitation and extended stays. Employees drive the customer experience. By developing and providing this resource for the hospitality industry and business community it will shine a light on the importance of visitor orientation and facilitation which will help elevate the city and champion visitation.

With the new Events page on www.helenamt.com, we will continually lean into utilizing this platform to ensure visitors are aware and can take advantage of the local opportunities and even extend their stay.

6 GROUP TRAVEL & MEETINGS

The TBID works to monitor and evaluate our efforts on developing the group travel market. If appropriate, we will be members of the American Bus Association (ABA) and the National Tour Association (NTA) and will continue to assess whether to attend NTA Travel Exchange or ABA's Marketplace.

TBID will continue to encourage our local community to bring meetings to Helena and will collaborate with our conference facilities. Efforts will focus on small market meetings, and we will attend the Small Market Meetings Conference.

Growth in this segment will help support seasonality in hotel occupancy, and impact the local economy by filling restaurants, retailers, and attractions.

7 TBID GRANT PROGRAM

The TBID Grant Program will continue to be refined to build upon the vibrancy of the community and inspire innovative and creative ideas for events or signature experiences; provide funding in the early planning stages; and maximize regional and national exposure by promoting the events early enough for visitors to include in their itinerary. The grant program has provided financial assistance in supporting sports and tournaments, music festivals, outdoor recreation events and a variety of other events.

The TBID is committed to developing a more year-round tourism base and contributing to a healthy local economy by supporting local activities, spending, tax generation and jobs through increased visitation to the area. Therefore, we will promote and market this program and invite local organizations and businesses as well as seek opportunities for larger events to apply for grant monies.

8 SPORT EVENTS & TOURNAMENTS

Special Olympics of Montana (SOMT) will be in Helena for the State Basketball Tournament which will take place again in November 2025. We will support SOMT.

The TBID will continue to work with the Helena School District and the Athletic Director on bids for Montana High School Association Events. Even though Helena is limited with indoor facilities, we are keeping Helena actively involved in the bidding process and are on the rotation cycle for tournaments.

The TBID will continue to build relationships and support local sports organizations and be a valuable resource to tournament directors and associations in efforts to host and grow competitions that draw athletes and fans from across the region generating room nights for lodging partners.

We are centrally located and a community-based town and are in full support of youth programs. Positioning Helena as a sports event destination remains a priority for Visit Helena with staff looking at new opportunities such as robotics, e-sports competition, etc. and partnerships to help shape the future of sports events in Helena.

9 ARTS & CULTURE

The TBID will strongly lean into promoting arts and culture in Helena. We will emphasize that Helena has a great deal to offer those who appreciate the fine arts: The Archie Bray Foundation for Ceramic Arts, Holter Museum of Art, Grand Street Theatre, Myrna Loy Center for the Performing and Visual Arts, and the Helena Symphony. Numerous fine art galleries showing all types of art from traditional to contemporary and more, provide Helena with a solid mix of culture that will be highlighted.

10 HERITAGE TOURISM



With the anticipated opening of **The Montana Heritage Center, Montana's Museum**, in late 2025, we will partner alongside them to create awareness of this attraction.

The Montana Heritage Center will capture the grandeur of the Treasure State by celebrating the natural features, diverse cultures, and stories of our past. The new home for the Montana Historical Society will include expanded museum exhibits, educational classrooms, a public event center, an enhanced research center, and a cafe, plus an outdoor courtyard and rooftop terrace. Visitors from across Montana and the world will experience state-of-the-art displays of their ever-expanding collections.

We will market & support the preparation for their **Grand Opening June 25-28, 2026**.

In addition, we will be working to secure a plan for wayfinding and signage systems to enhance navigational experiences & improve overall connectivity, reinforce community brand, and support local businesses.

Visit Helena will also continue to support the Montana History Foundation to promote their [Helena History Tours](#). This program is designed to promote heritage tourism by showcasing Helena's regional history through exploration of its surrounding environment.

Direct beneficiaries include Helena residents and tourists, with the broader economy of Helena serving as a secondary beneficiary.

The summer of 2025 will include the following tours:

- Rediscover Reeder's Alley
- Pedaling through the Past
- Redlight Rendezvous

- Echoes of the Past
- Wandering the Westside

Tours are offered at regularly scheduled afternoon and evening times. All tours will be available for private group tour bookings as well as a “History Triple Play” offer so that visitors will be encouraged to stay additional nights to participate in all guided experiences.

The Montana History Foundation has a new office located in Reeder’s Alley which will be a wonderful opportunity to book a tour on site, as well as provide an additional opportunity to connect The Montana Heritage Center to Downtown Helena.

11 MARKETING METHODS

Aspects of the tourism industry are forever shifting, so we continue to look for ways to provide offerings that make Helena attractive . Building off the recent Helena Brand Strategy we will continue to follow the three phases of the travel decision process – inspiration, orientation, and facilitation and highlight strong imagery and stories of people and activities in and around Helena.

The benefits of technology provide people the opportunity to have a greater choice in deciding where they want to visit and live. To establish Helena as a destination in the minds of both consumers and businesses, it is critical to lean into our new brand and utilize a strong, unified brand voice along with messaging and positioning that will raise overall awareness.

Supporting a strong destination brand will help build a sense of community that will support business and economic stability. The new branding and marketing initiative are the first step in a larger vision to strengthen collaboration between the City of Helena, county, community business leaders and organizations into an integrated approach to preserve Helena as well as take advantage of opportunities for future growth.

The TBID understands the critical need for effective content in today’s ultra-competitive marketplace and will continue to work closely with the local creative marketing agency SOVRN. This year will focus on continuing the Hel Yeah Campaign by capturing new summer hype footage as well gathering historical assets to champion the rich history in Helena and connect it to The Montana Heritage Center-Montana’s Museum.

Visit Helena will also work to lean into and expand on Southwest Montana’s already established Drink It In Montana that was established in partnership with Central Montana. *Drink It In Montana aims to capture the story of Montana’s craft beverage industry by helping newcomers experience the unique flavors and locally-owned businesses. As you travel through Montana, Drink It In. Experience Montana the way the locals do and enjoy our regional flavor.*

With the Montana Distillery Trail, trails and trail lines will be added to work as itineraries. Distilleries are the destinations with the goal in between to highlight Montana history and experience other popular attractions (i.e., scenic landscapes, various towns and history, culture).

Driven by the transformational power of human relationships and the inclusion of diverse voices, Visit Helena will also focus on a project called the *Faces of Helena*.

FACES OF HELENA, MONTANA'S HOMETOWN

Storytelling is at the very heart of destination marketing. Visit Helena wants to engage our audience with authentic stories and the inside scoop on the faces of Helena.

Helena's inspirational people are its strongest brand attribute, and the cumulative stories of the Helena community are a key differentiator.

This travel blog will lean into the Visit Helena Brand and focus on authentic experiences, local traditions, hidden gems, and insider tips, and sharing personal stories of individuals who aren't always in the spotlight to help readers immerse themselves in the culture. We aim to peel back the quirky local history and reveal some of the characters and antidotes associated with them, showcase the spirit and unspoken way of life of locals live by here, highlight authentic encounters, convey that hometown, curated Helena feel that represents why individuals love Helena--- the people, build an emotional bond that compels visitations and ambassadors and garners loyalty, and increase awareness and preference of Helena as a travel destination, not as a pass through.

The TBID will continue to implement a well-rounded social media strategy aimed at growing our audience and maintaining engagement with residents and showcasing Helena's history and charm. We will track key performance metrics, audience insights, and overall progress on our accounts.

The media plan will be primarily digital allowing the plan to stay flexible with changes in creative and messaging along with some print. Search engine optimization (SEO), social media marketing, website optimization, and email marketing are a variety of elements we will utilize to help us grow our tourism & destination business.

This year we will continue investing in **The Zartico Destination Operating System** which is a data-powered toolbox of insights for strategic decision-making. It will assist us with:

- Capturing a snapshot of destination performance and visitor profiles.
- Visualize trends in movement, spending, events, and lodging performance.
- Pinpoint opportunities to fine-tune demand and product development.
- Maximize marketing ROI.

12 MEDIA RELATION AND OUTREACH

Highlighting Helena in a positive way and ensuring our story is heard is something we value, which is why we want to increase earned media.

Throughout the year, Visit Helena will continue to build relationships with influencers and journalists that will help grow the brand and inspire travel. Visit Helena will proactively reach out as well as respond to appropriate media and influencers with original, relevant, and timely stories. We will also work with other tourism partners and our SW Montana region to uncover opportunities for collaborating.

Attending events such as Public Relations Society of America Travel and Tourism Conference will increase contacts and exposure.

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FY2025-2026 HELENA TBID BUDGET

Current TBID Assets	\$187,869.78
Outstanding Projects	\$60,000.00
Outstanding Payments	\$38,600.00
	\$89,269.78

June 2025 TBID Receivables	\$294,000.00
Estimated January 2026 TBID Receivables	\$ 294,000.00
Total Receivables	\$588,000.00
Total FY 2025-2026Assets	\$677,269.78

Expense	
Administrative Staff + Taxes + Benefits	\$210,000.00
Operational Expenses	\$81,924.00
Tourism Education & Advocacy	\$10,000.00
Marketing & Publicity	\$251,850.00
Opportunities & Grants	\$57,150.00
Sponsored Events	\$10,000.00
Conventions/Tradeshows	\$25,000.00
Professional Development Training	\$15,000.00
Reserves	\$16,345.78
TOTAL FY 2025-2026 Expenses	\$677,269.78

City of Helena, Montana
Commission Administrative Meeting

May 28, 2025

To: Mayor Collins and the Helena City Commission

From: Sheila Danielson, Finance Director
Alysia Ryan, Executive Director, Helena Business Improvement District

Subject: FY26 Business Improvement District Workplan and Budget Presentation

Present Situation:

The Business Improvement District is presenting its FY26 Budget and Workplan for consideration to the City Commission. Their annual budget proposes an assessment of approximately \$360,600. The Fiscal Year 2025 assessment was \$328,000. The assessment covers most of their operating costs to include maintenance of flower baskets, holiday lighting, graffiti removal, banners, façade and parklet grants, marketing, landscaping, facilities costs, public restroom maintenance and payroll expenses. They also receive program fees and rental offset fees.

Per State Law (7-12-1132, MCA) the BID is required to submit its budget and workplan to the City Commission for approval and to recommend a method of levying an assessment on property within the district to defray the cost of the work plan and budget. Included in this packet is their proposed workplan and budget for consideration.

There is no change in the assessment methodology from the prior fiscal year and is as follows:

Property Type	Flat Fee	Square Foot rate	Taxable Value rate
All other property not referred to below	\$300	\$0.00	4.0%
City except parks	\$300	\$0.00	0.0%
City parks	\$0	\$0.00	0.0%
City right of way	\$0	\$0.00	0.0%
Vacant or NVS per DOR	\$0	\$0.00	0.0%
Residential	\$100	\$0.00	1.0%
Other property without tax value	\$300	\$0.03	0.0%

Background Information:

On January 13, 2020, the City Commission adopted a resolution creating the BID for a period of ten years pursuant to 7-12-1101, MCA. The duration of the district cannot exceed ten (10) years.

After the BID Board of Directors approves the annual budget, they submit an annual workplan, budget and proposed method of levying an assessment to the City of Helena Commission for consideration. This is followed by a public meeting with notice to set a public hearing. The

assessment proposed should be equitable in proportionate share of benefits received by the property owners.

State Law (7-12-1133, MCA) indicates that assessments of costs may include Area, Lot, Taxable Valuation, Square Footage, And Flat Fee Options – Provisions for Property Classifications. The method should best ensure that the assessment on each lot or parcel is equitable in proportion to the benefits received. The Commission shall levy the assessment using one of the following methods:

- a) Each lot or parcel of land within the district may be assessed for that part of the whole cost that its area bears to the area of the entire district, exclusive of streets, avenues, alleys and public places.
- b) If the governing body determines that the benefits derived by each lot or parcel are substantially equivalent, the cost may be assessed equally to each lot or parcel located within the district without regard to the area of the lot or parcel.
- c) If the governing body determines that the benefits derived by each lot or parcel are proportional, the governing body may use standard criteria, such as individual occupancy or daily use, and make the assessment on a flat-fee basis on the criteria.
- d) Each lot or parcel of land, including the improvements on the lot or parcel, may be assessed for that part of the whole cost of the district that its taxable valuation bears to the total taxable valuation of the property of the district.
- e) Each building may be assessed for that part of the whole cost of the district that the occupied or income-producing area of the building above the first-floor bears to the area of the entire district.
- f) If the governing body determines that the benefits derived by each lot or parcel are disproportional, the governing body may use classification criteria, such as location within the district, economic impact, or any other measurable criteria, in conjunction with methods of assessing fees outlined in subsection (2). Each classification must have its own rate. There may not be more than six classifications upon which a charge is imposed.
- g) Using any combination of the assessment options provided in subsections (2)a through (2)f.

In reviewing the proposed assessment methodology for Fiscal Year 2026, staff believes it meets the qualifications as an assessment methodology in state law.

Proposal/Objective:

Consider the Business Improvement District's Proposed FY26 Budget, Workplan and assessment methodology.

<u>Advantage:</u>	Acceptance of the BID FY26 Workplan, Budget and Assessment Methodology will allow staff to bring the Resolution of Intention and a motion to set a public hearing at the June 2, 2025 Commission meeting.
<u>Notable Energy Impact:</u>	N/A
<u>Disadvantage:</u>	N/A
<u>Notice of Public Hearing:</u>	N/A
<u>Staff Recommendation/ Recommended Motion:</u>	N/A – Information only



Work Plan and Budget Proposal

Fiscal Year 2026

History

Helena created Montana's first Business Improvement District in 1986 when a group of business and property owners collaborated with the goal of promoting economic growth in downtown Helena. The Helena BID is a 501 (C)(6) created by state statute through a resolution of the City of Helena. The BID's most recent creation was approved by the City Commission on January 13, 2020, [Resolution No. 20589](#).

Helena Business Improvement District (BID) represents property owners within Helena's legally constituted city district. Revenues to fund the BID programs and services are derived from a special assessment on the property owners' tax bills.

Goal

The goal of the BID is to ensure the long-term preservation and vitality of the city's economic, cultural, social, human, and natural assets. Through our programs and services, the BID works to keep the downtown a beautiful, vibrant, and safe place to work, shop, invest, explore, dine, and play.

Mission

The mission of the BID is to serve as a facilitator, provider, and advocate for planned, creative programs that continually improve property values and properties in downtown Helena.

Governance

The BID is operated by a volunteer Board of Trustees who are property owners or designated representatives from within the district. Trustees are appointed by the City Commission. The Board of Trustees meets monthly on the second Tuesday at 3:30 p.m. at our office, 330 Jackson St. All meetings are open to the public and agenda, minutes and financials posted for public inspection.

PROGRAMS AND SERVICES

The BID proposes continuing our existing projects in FY26, with some additions. We propose spending slightly more than our projected revenue, using our cash balance from FY25.

Flowers and Landscaping

This year, the BID will purchase, install, and maintain 100 flower baskets and 30 flower barrels. Flower barrels continue to be popular, as they require less water and stay vibrant longer. The BID buys the flowers from High Country Growers and pays our Maintenance Ambassadors to water them. The BID also contracts with the City for water and beautification, including trash pickup. The flowers are displayed throughout downtown, including the Great Northern Town Center, from June through September on historic lamp posts and cobra lights.

In addition to summer flowers, the BID maintains 11 landscaped beds along the 300 and 400 blocks of Last Chance Gulch.

Holiday Decorations

The BID installs holiday decorations downtown. These include lighted and unlighted garlands, bows, and wreaths on the historic lamp posts along Last Chance Gulch and the cobra poles elsewhere in the district. Additional lighting throughout the Pedestrian Mall includes decorating the trolley, gazebo, and entrance to Performance Square. The BID contracts the work for installation and removal and maintains the decorations from November to January.

In FY25, we purchased and installed 26 new rope lights to wrap around cobra lights on Last Chance Gulch. Along with other decorations traditionally installed, the BID plans to install additional rope lights and anchors on height-appropriate buildings for garlands to be strung across Last Chance Gulch as appropriate.

Sanitation

The BID owns and maintains 23 trash cans in the district. The BID employs 4 Maintenance Ambassadors to empty and clean the cans. We plan to replace the vinyls on the can lids this year, in collaboration with the Holter Afterschool Teen Arts Council for a variety of designs. The vinyls will also have a QR code with the BID's website for maintenance needs.

BID rented and maintained a portable toilet in Constitution Park during FY25 and it has been a successful undertaking. The BID will continue to maintain the portable toilet in FY26 until no longer necessary. The BID has been working with the City Parks and Recreation Department to install a public restroom in Constitution Park. The City Commission had approved \$98,000 of General Fund Surplus money and the County Commission has committed \$35,000. The BID is allocating \$25,000 of the FY26 budget toward the landscape architectural contract. To help fund the installation of the toilet, the BID will use funds from our STIP account. Currently, we are prepared to spend \$44,000 for installation.

Graffiti Removal and Prevention

The BID contracts with professional graffiti removers to prevent or remove vandalism while safeguarding building integrity.

Banners

The BID purchases, installs, and maintains 144 downtown banners. The Maintenance Ambassadors do seasonal banner changes in November and April.

We also offer other organizations an opportunity to purchase their own banners and contract with the BID for installation. Banners for the Prickly Pear Land Trust, Governor's Cup, and Septemberfest will be on display during the summer of 2025. The board has voted to slightly increase the cost of the program. We will continue to grow this program in FY26 and conduct targeted outreach to event organizers in Helena to make them aware of this opportunity.

Façade and Parklet Grants

The BID offers a one-to-one match of up to \$5000 per project for façade improvements. In FY25, the BID awarded 6 façade grants. These funds are given to reimburse downtown businesses for new awnings, painting, new fixtures, etc.

The BID funds a Parklet Grant program but did not see any interest in this program in FY25. We have reduced the budget for that program but will continue to reserve funds should the interest arise.

Event Grants

With the dissolution of Downtown Helena, Inc. at the end of 2023, the BID recognized the need to encourage event organizers to continue to hold events in the downtown core. The BID will again set aside \$10,000 in Event Grants during FY25 to meet those needs. A portion of this amount will be made specifically available to encourage new events downtown. Awardees may request up to \$1000 in funding for promotion and permitting costs associated with holding an event downtown. This program was very successful in FY25, receiving 12 applications and awarding almost all the budgeted funds.

Business Development

BID allocates funds to assist with business development and incubation, seeking partnerships and suitable projects to support new business startups in downtown Helena. In FY 25, \$5000 was allocated toward matching grants for new businesses in the district. In FY25, five were funded. In FY26, an additional \$1,500 will be allocated to this grant program.

Marketing

The BID promotes downtown Helena through various channels including its website, social media and flyers with guidance from the Promotion Committee. Website maintenance and all social media are being done in-house. We hired two photographers to take photos of all businesses in the district for their use and the use of the BID in its social media efforts. The BID also collaborates with the Helena Chamber of Commerce and Visit Helena on promotional efforts.

Safety Initiative

In response to growing concerns over the safety of downtown events, the BID is collaborating with City officials in the fire, police and transportation divisions, to provide training to event volunteers. The training includes Crowd Management, CPR, First Aid and fire extinguisher use. To date, 65 people have completed all or a portion of this training.

Advocacy

The BID acts as a liaison between downtown property/business owners and the City and other entities. In FY25, it began collaborating with the Helena Chamber of Commerce at “Connections of Cruse” to meet monthly with business owners and other stakeholders to solicit feedback and address concerns and coordinate efforts. The cost of this advocacy work is reflected in payroll.

Capital/Large Projects

The BID maintains a reserve for large expenditures such as the proposed installation of a public restroom and wayfinding associated with the opening of the new Heritage Museum. All checks over \$5000 must be signed by two signatories and approval for large one-time expenditures must be obtained from the Board of Trustees. The BID used a part of this reserve during FY25 to cover the gap of \$23,425 between the BID’s income and expenses. The BID will continue to utilize the two full-time professional staff budgeted in FY25 to grow programs, sponsorships and increase the income of the organization.

FY2026 BID Budget	
Income	
BID Assessment	\$360,600
Community Sponsorships	\$10,000
Equipment Rental	\$1,000
Nuggets Program	\$7,000
Safety Initiative income	\$500
Banner Program	\$3,4000
Office Rent	\$2500
Grants	0
STIP Interest	\$12,000
Total Income	\$397,000
Expenses	
Program and Services	

Public Restroom/ Maintenance	\$26,500
Event Grants	\$15,000
Flowers	\$11,000
Landscaping	\$1,200
Holiday Lighting	\$1,000
Safety Initiative (crowd manage., CRP, first aid)	\$2,500
Graffiti	\$8,000
Banners/Banner Services	\$6,000
Façade Grants	\$25,000
Parklet Grants	\$500
New Business Development grants	\$6,500
Marketing	\$35,000
Total Program and Services Expenses	\$138,200
Payroll	
Salaries/Wages (2 FTE, 4 PTE)	\$152,000
Payroll Taxes/Benefits	\$31,000
Total Payroll Expenses	\$183,000
Administrative Expenses	
Facilities and Equipment	\$41,000
Administrative	\$36,000
Total Administrative Expenses	\$77,000
Total Expenses	\$398,200
Income/Loss	-1,200

METHOD OF LEVYING ASSESSMENT

Montana Code Annotated 7-12-1133 states that when the board submits the annual budget and work plan to the governing body (City of Helena), the board shall also recommend a method of levying an assessment within the district that will best ensure the assessment of each lot or parcel is equitable in proportion to the benefits to be received.

Background: During the creation process in 2019-2020, several property owners suggested a review of the assessment. An ad hoc committee was formed in October 2020 to address this request. The Board of Trustees approved an assessment methodology change for fiscal year 2023, and the change was adopted for fiscal year 2024. There is no change for the fiscal year 2025 or 2026.

FY26 Assessment Methodology Recommendation (MCA 7-12-1133 2(g))

- Every assessment code will be assessed a flat fee, except vacant or non-valued properties, city parks, and city rights of way.
- Every private property assessment code will be assessed the flat fee plus a taxable valuation fee.
- Every non-taxed property assessment code will be assessed the flat fee plus a square foot fee for area.
- Every vacant or “non-valued with specials” (NVS) assessment code is exempt from all assessments.

Assessment Matrix

Property Type		Flat Fee	SF rate	TV rate
All other property not referred to below		\$300	\$0.00	4.0%
City except parks		\$300	\$0.00	0.0%
City parks		\$0	\$0.00	0.0%
City right of way		\$0	\$0.00	0.0%
Vacant or NVS per DOR		\$0	\$0.00	0.0%
Residential		\$100	\$0.00	1.0%
Other property without tax value		\$300	\$0.030	0.0%

Methodology Features

- Relies solely on Department of Revenue property classifications.
- Treats every property with a tax code as an independent entity.
- Eliminates the area portion of the calculation for all properties besides non-taxed, for which the area portion is retained in lieu of the taxable value portion.
- Eliminates “aggregation” of residential and commercial condo units and “accessory parking,” which had been inconsistently applied.

OPERATING AND PARTNERSHIP AGREEMENTS

Downtown Helena Inc. (DHI)

DHI, a 501(C)(6) organization, was dissolved in December `2023. The BID continues to provide minimal administrative support to the Downtown Nuggets program, which had been administered by DHI. Nuggets will continue to be redeemed by BID until 2029.

Helena Community Foundation

The Helena Community Foundation has supported BID in the past by managing donations and sponsorship efforts on its behalf. In FY26, the BID will explore additional fundraising opportunities and utilize the Helena Community Foundation in these efforts.

City of Helena

The City of Helena and the BID have maintained a collaborative partnership on various projects. A Memorandum of Understanding (MOU) has been drafted between the BID and the City to delineate shared responsibilities, particularly regarding flower maintenance, sanitation, and landscaping. As part of this MOU, the City will sponsor some of the sanitation and beautification efforts of the BID in FY26. An MOU with the City Parks & Recreation Department is also in place regarding collaborative efforts on the Constitution Park restroom.

Main Street Program

The Montana Main Street Program, a collaborative initiative between the Community Development Division and the Montana Office of Tourism at the Montana Department of Commerce, assists communities in strengthening and preserving their historic downtown commercial districts. This is achieved through economic development, urban revitalization, and historic preservation efforts focusing on long-range planning, organization, design, and promotion. The BID coordinates for the Helena community. The City of Helena has been recertified as a 2025 Montana Main Street community.

City of Helena, Montana

05/20/2025

To: Mayor Collins and the Helena City Commission

From: Sheila Danielson, Finance Director

Subject: FY26 Budget Discussion - Sustainability Projects/Sidewalk Funding

Present Situation: Consider additional funding for Sustainability Projects and Sidewalk Loan program from General Fund Cash Reserves for Fiscal Year 2026

Background Information: During the May 14, 2025 Administrative Meeting, the Commission was asked to consider potential funding from General Fund Cash Reserves for Sustainability Projects and Sidewalk Loan Program Funding.

The Commission was asked for direction to consider funding for the Sidewalk Loan Program. This program is a zero percent interest, 10-year loan program for residents of Helena to fix their aging sidewalks. This program has proven to be popular and the current number of active loans is 213. This program is a first come first serve program for applications and once the allocated funding is awarded, applicants must re-apply the next year.

The Commission gave consensus to establish appropriations in the FY26 Preliminary Budget as follows:

\$150,000 - Sidewalk Loan Program

The Commission was presented a list of potential sustainability projects that have been identified by Public Works that would make a positive impact in City Operations and further the Commission's efforts to promote sustainability in the City of Helena.

The Commission gave consensus to establish appropriations in the FY26 Preliminary Budget as follows:

\$75,000 - Purchase of a Glass Crusher for the Transfer Station

Proposal/Objective: Consider any additional funding for the Sidewalk Loan program and for sustainability projects for Fiscal Year 2026. Funding for the Sidewalk Loan program must come from General Fund Cash Reserves. Funding for some sustainability projects may come from General Fund Cash Reserves and potential funding considerations from grants or respective funds should also be considered.

Advantage: Expand Sidewalk Loan Program and sustainability projects

Notable Energy Impact: Sustainability projects have potential to reduce the usage of energy.

Disadvantage: General Fund Cash Reserves are budgeted for capital improvements and should maintain a healthy balance to ensure our facilities, parks and other general capital infrastructure assets are maintained to for future generations.

Quasi-Judicial Item: False

Notice of Public Hearing: False

**Staff Recommendation/
Recommended Motion:** Consider providing direction to the City Manager to include any further appropriations in the Fiscal Year 2026 budget for the Sidewalk Loan Program or Sustainability Projects.

Location	Dept	Project	Utility Cost Savings Annually	Implementation Cost	Status	ROI (years)	Comments
CCAB	Comm Fac	Steam to HHW Conversion	\$ 18,728	\$ 2,246,000	Not Planned	120	Steam to Heating Hot Water Conversion
CCAB	Comm Fac	MZ AHU to VAV AHU Upgrade	\$ 13,508	\$ 168,000	Under Review	13	Multi-Zone Air Handling Unit to Variable Air Volume Air Handling Unit Upgrade
CCAB	Comm Fac	MZ AHU Schedule Implementation	\$ 8,187	\$ 1,000	Recommended	1	Multi-Zone Air Handling Unit Schedule Implementation
CCAB	Comm Fac	Economizer For MZ & Chambers AHU	\$ 2,716	\$ 3,000	Under Review	1	Economizer on Multi-Zone and Chambers Air Handling Units
CCAB	Comm Fac	Zone Setbacks	\$ 8,068	\$ 1,000	Under Review	1	Zone Temperature Setbacks
CCAB	Comm Fac	Air Sealing for Leaky Windows	\$ 15,492	\$ 132,000	Under Review	9	Air Seal or Replace Leaky Windows
CCAB	Comm Fac	LED Lighting Upgrade	\$ 6,272	\$ 70,350	In Progress	11	LED Lighting Upgrade
CCAB	Comm Fac	Low-Flow Bathroom Fixtures	\$ 890	\$ 1,000	In Progress	2	Bathroom Sink Aerators
CIVIC	Comm Fac	Ballroom RTU with ERV	\$ 6,342	\$ 176,000	Under Review	28	Ballroom Roof Top Units with Energy Recovery Ventilator
CIVIC	Comm Fac	Auditorium RTU and Mini-Splits	\$ 5,276	\$ 157,000	Under Review	30	Auditorium Roof Top Units and Mini-splits
CIVIC	Comm Fac	Auditorium Heat Pump RTU	\$ 4,604	\$ 140,000	Under Review	31	Auditorium Heat Pump Roof Top Unit
CIVIC	Comm Fac	Steam to HHW Conversion	\$ 14,702	\$ 1,388,140	Not Planned	95	Steam to Heating Hot Water Conversion
CIVIC	Comm Fac	HHW Conversion + Ballroom & Auditorium WSHP	\$ 15,439	\$ 1,579,140	Not Planned	103	Steam to Heating Hot Water Conversion + Water-Source Heat Pumps
CIVIC	Comm Fac	Lighting Upgrade	\$ 2,115	\$ 15,690	In Progress	4	LED Lighting Upgrade
LJC	Comm Fac	LED Lighting Upgrade	\$ 7,519	\$ 19,850	In Progress	3	LED Lighting Upgrade
LJC	Comm Fac	AHU-1 Economizer Repair	\$ 2,087	\$ 1,500	Under Review	1	Air Handling Unit-1 Economizer Repair
LJC	Comm Fac	AHU-2 Supply Fan VFD	\$ 1,861	\$ 11,000	Under Review	6	Air Handling Unit-2 Fan Variable Frequency Drive
LJC	Comm Fac	MZ to VAV Conversion and DDC Upgrade	\$ 17,913	\$ 420,000	Under Review	24	Multi-Zone to Variable Air Volume Conversion and Direct Digital Control Upgrade
LJC	Comm Fac	Boiler Upgrade	\$ 10,136	\$ 671,000	Completed	67	Boiler Upgrade
LJC	Comm Fac	Air Sealing and Weatherization	\$ 3,211	\$ 7,500	Under Review	3	Air Sealing and Weatherization of Doors and Windows
TMWTP	Public Works	Backwash Pump VFDs	\$ 8,342	\$ 46,410	Completed	4	Backwash Pump Variable Frequency Drives
TMWTP	Public Works	MO River High Zone Pump Control	\$ 39,772	\$ 5,000	Under Review	1	Missouri River High Zone Pump Control
TMWTP	Public Works	Distribution Pump House VFDs	\$ 11,269	\$ 160,000	Under Review	13	Distribution Pump House Variable Frequency Drives
WWTF	Public Works	Lighting Upgrade	\$ 5,001	\$ 22,579	In Progress	5	LED Lighting Upgrade
WWTF	Public Works	Modulating UV Disinfection System	\$ 3,935	\$ 25,000	Under Review	7	Modulating Ultraviolet Disinfection System
WWTF	Public Works	Secondary Pump Control	\$ 4,426	\$ 1,000	Under Review	1	Secondary Pump Control
WWTF	Public Works	Mixer Motor Upgrades	\$ 35,663	\$ 385,000	In Progress	9	Mixer Motor Upgrade
WWTF	Public Works	Blower Motor VFDs	\$ 47,050	\$ 840,000	In Progress	9	Blower Motor Variable Frequency Drives
CTS	Transport	50kW Ground Mount Solar	\$ 8,000	\$ 140,000	Completed	17.5	City Transportation Shop Solar Project, does not include USB grant from NWE (\$50,000) or potential Direct Pay at approx. 30% (\$42,000)
BRGC	Parks	50kW Ground Mount Solar	\$ 8,000	\$ 270,000	In Progress	33.75	Bill Roberts Golf Course Solar Project, does not include USB Grant from NWE (\$57,000) or potential Direct Pay at approx. 30% (\$81,000)
			Total	\$ 9,104,159			
CCB Recommendations							
City Wide	Public Works	Community Climate Action & Resiliency Plan	N/A	\$ 250,000	Under Review	N/A	Support and direct preparation of new City of Helena Climate Action and Community Resiliency Plan
City Wide	Comm Dev and Finance	Residential Energy Efficiency and Renewable Energy Loan Program	N/A		In Progress	N/A	Additional funding to the Efficiency and Renewable Energy Loan Program - max \$12,000 per application, approximately 7 applicants on waitlist
City Wide	Transport	Green Transportation	N/A	\$ 55,000	Under Review	N/A	Pilot program of City multi-departmental use electric vehicle (EV Pick-up)
TS	Public Works	Glass Crusher	15,000	\$ *	Under Review	5	Invest in Glass Crusher - Compactors, Inc quoted \$50K, Andela - MegaMini \$75557
LJC	Comm Fac	Xeriscape Project Signage	N/A	\$ 5,000	Under Review	N/A	Add signage to xeriscape project to provide residents information and resources for residential resiliency projects
			Total CCB for Known	\$ 385,000			