Financial Update

City of Helena, MT Downtown TIF District Board Financial Report As of 12/31/21

Beginning Cash July 1, 2021*	\$ 261,742
Revenue:	
Real Property Taxes	58,623
Personal Property Taxes	124
Penalty & Interest Interest	57
Total Revenue	\$ 58,804
Expenditures:	
Contracted Services Capital Outlay	110,975 -
Total Expenditures	\$ 110,975
Ending Cash - December 31, 2021	\$ 209,571
Less	
Project Commitments	 113,099
Cash Available	\$ 96,473

*Reflects Audit Adjustment in FY21

Cruse Avenue Triangle Park Application



IMPORTANT: THERE IS A MATCH REQUIREMENT OF UP TO 50% WITH AN OPTION FOR EXEMPTION FOR DEMONSTRATED HARDSHIP. COSTS TO BE PAID WITH DOWNTOWN URBAN RENEWAL DISTRICT FUNDS MAY NOT BE INCURRED BY THE APPLICANT PRIOR TO FUNDING APPROVAL AND THE SATISFACTION OF ANY CONDITIONS OF SUCH APPROVAL.

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

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

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

CHECKLIST ITEMS
Project Description
Project Renderings (where applicable)
Application Form (pages 2-4)
Project Financing Worksheet (page 5)
Project Narrative Section (page 6)

Downtown Urban Renewal District TAX INCREMENT FINANCING APPLICATION FORM Community Development Department Phone (406) 447-8490 Fax (406) 447-8460 <u>citycommunitydevelopment@helenamt.gov</u>				
Project Name:		Date Submitted:		
APPLICANT INF	FORMATION			
Name (First & I	_ast):			
City:	State:	Zip Code:		
Phone:	Cell:	Zip Code: Other:		
the status indi A non-pro A partner District Re	cated below and is organized or operat fit or charitable institution/corporation ship or corporate entity known as esident	der his/her own name, the applicant has ing under the laws of: State of Montana		
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PROJECT ARCHITECTURAL FIRM INFO	RMATION (WHERE APPLICABL	E)
Company/Firm:		
Point of Contact (First & Last):		
Address:		
City:	State:	Zip Code:
Phone:	Cell:	Other:
Email:		
PROJECT FINANCIAL LENDING INSTIT	UTION (WHERE APPLICABLE)	
Company/Institution:		
Point of Contact (First & Last):		
Address:		
City:	State:	_ Zip Code:
Phone:	Cell:	Other:
Email:		
PROJECT CONTRACTOR INFORMATIO	N (WHERE APPLICABLE)	
Company/Firm:		
Point of Contact (First & Last):		
Address:		
City:		_ Zip Code:
Phone:	Cell:	Other:
Email:		

DESCRIPTION OF PROJECT

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

PROJECT RENDERINGS (IF APPLICABLE)

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



TOTAL COST OF THE PROJECT

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

PROPERTY OWNERSHIP

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

JOB CREATION

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

PROJECT COMPLETION

What is the expected completion date of the project?

PROPERTY TAXES

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



PROJECT COST & FINANCING SECTION

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

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

PROJECT COST WORKSHEET		
Professional Services		
1		\$
2		\$
		\$
Construction/Rehabilitation Costs		
1		\$
2		
3		
4		\$
5		
6		\$
		\$
Printing, Advertising, etc.		
1		\$
2		\$
		\$
Other Miscellaneous Costs		
1		\$
2		\$
		\$
TOTAL PROJECT DEVELOPMENT COSTS		
Tota	ι\$	_



PROJECT FINANCING WORKSHEET

Match Requirement

Does the applicant intend to match 50% of the total project cost?

	Yes		No
--	-----	--	----

If no, please identify the community benefits that will be gained from the proposed project.

1	
2	
3	
4	
5	
Owner/Developer Investment	
Is the applicant proposing to invest a portion of the total project	t cost?
Yes No	
If yes, how much does the applicant propose to invest?	\$
Other Funding Sources (if applicable)	
1	\$
2	\$
3	\$
Request for Eligible items	
Total TIF Requested	\$
TOTAL PROJECT FINANCING	Ş



PROJECT NARRATIVES SECTION:

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



PROJECT NARRATIVES SECTION (CONTINUED):

- **3.** Economic & Community Development Potential: Provide a brief narrative for the following. If not applicable, please note:
 - **a.** <u>Tax generation</u>: Describe how the project will increase the taxable valuation in the District.
 - b. <u>Relationship of public and private investment</u>: Describe the relationship of private investment to public investment of a project and discuss how it is a prudent investment of public funds within the urban renewal district.
 - c. Job Creation: Are there any jobs created as a result of the project? Please describe.
 - **d.** <u>Investment Spin-off</u>: Describe any potential for investment spin-off having a positive impact on the District.
 - e. <u>Cost-Benefit Analysis of the Investment/Expenditure</u>: For projects that are \$10,000 or more, a cost-benefit analysis should be completed.
 - f. <u>Health and Safety Concerns</u>: Describe the project's impact, positive or negative, on the environment in terms of noise, dust, pollution, public safety, traffic congestion, pedestrian access, visual aesthetics, etc.
 - **g.** <u>Historic Preservation</u>: Describe the project's ability to preserve and protect the cultural and economic heritage and physical assets of the district.
 - **h.** <u>Density, Infill, and Adaptive Reuse</u>: Describe if the project increases density in the DURD through infill and adaptive reuse of existing property(s).
 - i. <u>Cost of Public Services</u>: Describe how the projects will improve public services such as water, sewer, sidewalks parking, improved traffic circulation, etc., to an area currently underserved.
 - **j.** <u>Housing Component</u>: Describe any housing components to the project. One of the main goals of the Downtown Neighborhood Plan and the Downtown URD Plan is to promote all types of housing in the area.
 - **k.** <u>Conformance with Requirements for TIF Fund Expenditures, per 7-15-4288, MCA: Projects</u> must cover eligible project activities stated in Montana state statutes (See Attachment A).

Attachment A

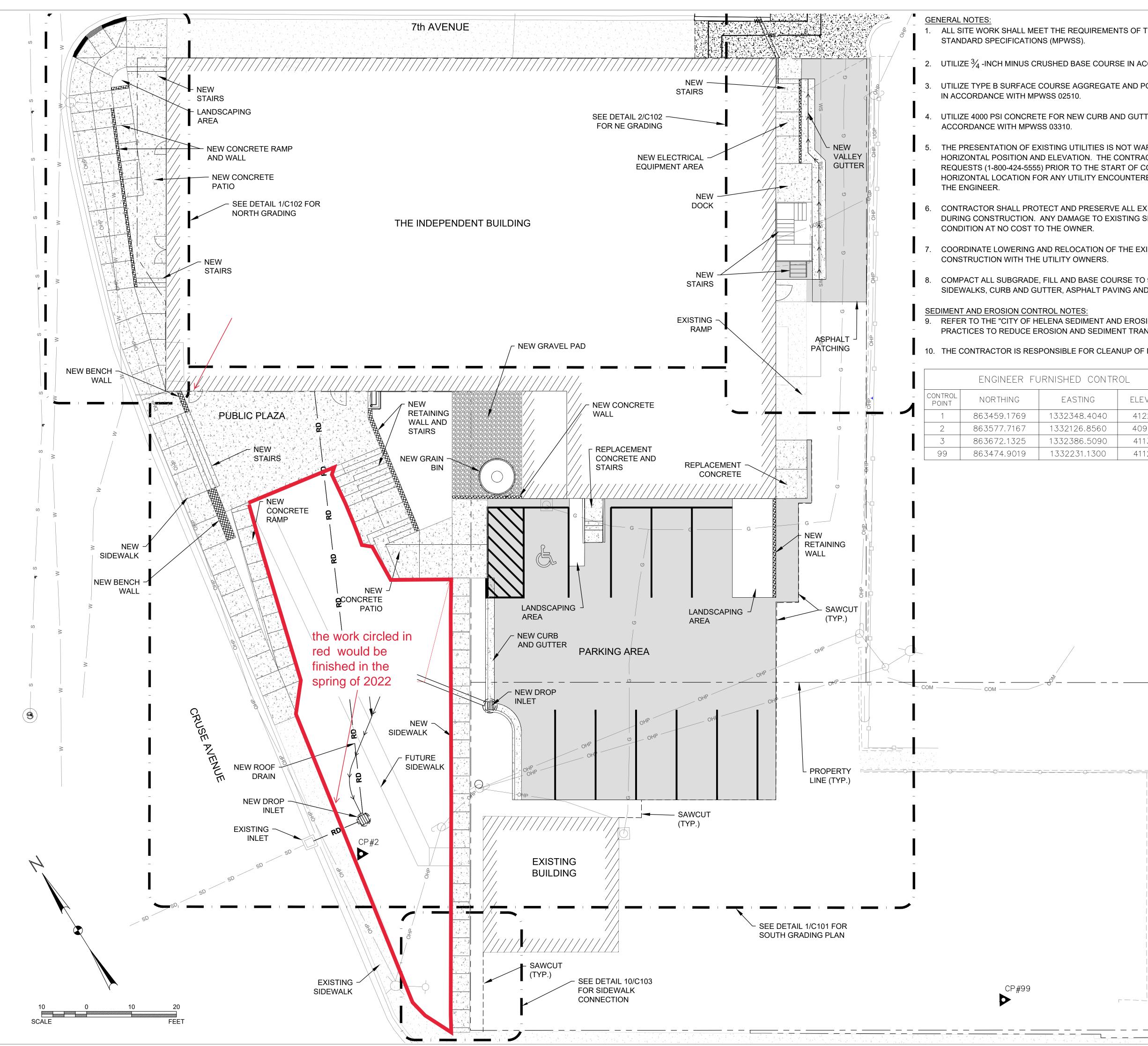
ELIGIBLE ACTIVITIES

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

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

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

Atta	achment B Goals of the Downtown URD (Continued)	
•	 Create a quality and unique experience Make improvements to attract more businesses 	
	 Encourage ground-floor transparency Capitalize on downtown's historic assets 	
•	 Stimulate Vibrancy with a Mix of Uses (Rodney Street Goal) Retain the neighborhood character allowing for mixed uses, a variety of residential types and a central commercial area Keep the area primarily residential with a range of housing types intermixed with offices and government uses Increase residential capacity Retain the Rodney Street Commercial Center as the primary area for retail, with the potential for housing and offices in the upper floors 	
•	Reinvigorate the Rodney Street Commercial Center (Rodney Street Goal)oRetain and build the Neighborhood Center as the center for retail,	
	commercial and social gathering	
	 Improve Rodney Street functionality, infrastructure and aesthetic between 6th and Broadway 	
	• Create gateways with wayfinding at both ends of the commercial center	
	 Create better linkages between the courthouse complex, Myrna Loy center and Rodney Street 	
	 Incorporate public art that differentiates the area from Downtown tonto a fun and funky interactive way 	
	 Monitor parking demand and identify potential for temporary uses or longer term uses 	



ALL SITE WORK SHALL MEET THE REQUIREMENTS OF THE SIXTH EDITION OF THE MONTANA PUBLIC WORKS

2. UTILIZE $\frac{3}{4}$ -INCH MINUS CRUSHED BASE COURSE IN ACCORDANCE WITH MPWSS SECTION 02235.

3. UTILIZE TYPE B SURFACE COURSE AGGREGATE AND PG 58-28 ASPHALT BINDER FOR THE NEW ASPHALT PAVEMENT

4. UTILIZE 4000 PSI CONCRETE FOR NEW CURB AND GUTTER, SIDEWALKS, RAMPS, PATIO, SLABS AND STAIRS IN

THE PRESENTATION OF EXISTING UTILITIES IS NOT WARRANTED TO BE EITHER COMPLETE OR EXACT IN HORIZONTAL POSITION AND ELEVATION. THE CONTRACTOR IS RESPONSIBLE FOR REQUESTING UTILITY LOCATE REQUESTS (1-800-424-5555) PRIOR TO THE START OF CONSTRUCTION. DISCREPANCIES IN THE VERTICAL AND HORIZONTAL LOCATION FOR ANY UTILITY ENCOUNTERED SHALL BE IMMEDIATELY BROUGHT TO THE ATTENTION OF

CONTRACTOR SHALL PROTECT AND PRESERVE ALL EXISTING SITE FEATURES TO THE GREATEST EXTENT POSSIBLE DURING CONSTRUCTION. ANY DAMAGE TO EXISTING SITE FEATURES SHALL BE REPAIRED TO ORIGINAL OR BETTER

COORDINATE LOWERING AND RELOCATION OF THE EXISTING UTILITIES THAT ARE IN CONFLICT WITH NEW

COMPACT ALL SUBGRADE, FILL AND BASE COURSE TO 95% OF MAXIMUM DRY DENSITY BELOW ALL NEW SIDEWALKS, CURB AND GUTTER, ASPHALT PAVING AND CONCRETE.

REFER TO THE "CITY OF HELENA SEDIMENT AND EROSION CONTROL FIELD MANUAL" FOR BEST MANAGEMENT PRACTICES TO REDUCE EROSION AND SEDIMENT TRANSPORT.

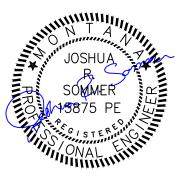
10. THE CONTRACTOR IS RESPONSIBLE FOR CLEANUP OF MUD AND DEBRIS TRACKED ONTO STREETS.

IISHED CONTROL		
EASTING	ELEVATION	
332348.4040	4122.022	
332126.8560	4097.278	
332386.5090	4113.407	
1332231.1300	4112.009	

 \square







		# DATE REVISION
LEGEND		
	NEW ASPHALT	architecture-planning-desig
	NEW CONCRETE	428 N. Last Chance Gulch Helena, Montana 59601
	EXISTING CONCRETE	406.449.2013 phone 406.449.2036 fax www.mosaicarch.com
RD RD	NEW ROOF DRAIN	THE INDEPENDENT
OHP	EXISTING OVERHEAD POWER	
W	EXISTING WATER MAIN	THE INDEPENDENT
G	EXISTING GAS LINE	317 Cruse Helena, Montana
COM	EXISTING COMMUNICATIONS	59601
S	EXISTING SEWER MAIN	OVERALL SITE PLAN
SD SD	EXISTING STORM DRAIN	.
	PROPERTY BOUNDARY LINE	DATE: 01.29.2021
Δ	CONTROL POINT	-
		SHEET: C100

After recording, return to: City Attorney's Office City-County Bldg., Room 203 316 North Park Avenue Helena, MT 59623 (406) 457-8595

> 3372489 B: M58 P: 6728 ENCR 02/09/2021 09:19 AM Pages: 1 of 5 Fees: 35.00 Amy Reeves Clerk & Recorder, Lewis & Clark MT

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ENCROACHMENT AGREEMENT

THIS AGREEMENT is made and entered into this <u>b</u> day of <u>February</u>, 2021, by and between the CITY OF HELENA, MONTANA, a municipal corporation organized and existing under the laws of the State of Montana, 316 North Park Avenue, Helena, Montana 59623, hereinafter referred to as "City," and GREG ALLEN, 317 Cruse Partners, LLC, 8401 Wagon Boss Road, Bozeman, Montana 59718, hereinafter referred to as "Owners."

NOW, THEREFORE, in consideration of the mutual covenants and agreements herein contained, the receipt and sufficiency whereof being hereby acknowledged, the parties hereto agree as follows:

1. City owns that certain property in the City of Helena, Lewis and Clark County, Montana, described as follows: the Cruse Avenue right-of-way adjacent to Block 46 of the Original Townsite of Helena and the South twenty-six (26') feet of Lot 17 in Block 46 of the Original Townsite of Helena.

2. Owners own that certain property in the City of Helena, Lewis and Clark County, Montana, described as follows: North eighty-eight (88') feet of Lots 16 and 17 in Block 46 of the Original Townsite of Helena, with and address of 317 Cruse Avenue.

3. In order for Owners to more fully enjoy their property described above, Owners hereby request an Encroachment Agreement from the City to allow Owners to install and maintain an ADA access ramp that extends approximately 6.5 feet onto the Cruse Avenue right-of-way adjacent to the property. Owners request a second encroachment from the City to allow Owners to maintain the existing building that extends approximately three feet eleven and a half inches (3'11.5") onto deeded city property.

4. By issuance of this Encroachment Agreement, the City agrees to allow Owners to install and maintain the above-mentioned ADA access ramp ("access ramp") and existing building over the right-of-way and deeded property as described in Paragraph 1 above.

The parties hereto agree that when Owners' access ramp and building, the 5. maintenance of which is hereby allowed, are destroyed or worn out, said access ramp and building may not be repaired or replaced without the express written consent of City. Further, said property shall be installed, operated, and maintained pursuant to the direction of the Helena City Manager.

6. Owners agree that they are not acquiring any property interest in the City's property or gaining any right to use any City property beyond that permitted in this Agreement.

7. Owners agree and promise that the maintenance of the access ramp and building authorized hereby may not interfere with the use by City of its property described above. If the access ramp and building interfere with City's use of the right-of-way or deeded city property, City may cancel this Agreement by giving the Owners sixty (60) days' written notice of its intent to cancel. At the expiration of said 60 days, Owners shall remove, at their own expense, the access ramp and building from the City's right-of-way.

The City may, without advance notice, perform necessary repairs to any public 8. utilities that may be within the encroachment area. The City will minimize damage done to the access ramp and building due to such repairs.

9. Owners agree to hold the City of Helena, its officers, agents, and employees harmless from any costs, liability, expense, or damage of any kind, in any way arising out of the location of the access ramp and building within the street right-of-way and deeded city property as herein authorized.

The terms, covenants and provisions of this Encroachment Agreement shall run with 10. the land and extend to and be binding upon the successors in interest, heirs, executors, administrators, personal representatives, successors and assigns of the parties hereto.

IN WITNESS WHEREOF, the parties hereto have executed this instrument the day and year first above written.

ATTEST:

OFHE

Dannai Clayborn, City

CITY OF HELENA, MONTANA

Rachel Harlow-Schalk, City Manager

APPROVED AS TO FORM:

Thomas J. Jodoin, City Attorney

By

Greg Allen, Manager **317 Cruse Partners, LLC**

STATE OF MONTANA \$5. **COUNTY OF LEWIS & CLARK**

ぶ , 2021, before me, a Notary Public for the State of On this 8th day of February Montana, personally appeared Rachel Harlow-Schalk and Dannai Clayborn, the City Manager and City Clerk of the City of Helena, known to me to be the persons whose names are subscribed to the foregoing instrument, and acknowledged to me that they executed the same in such capacities.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my Notarial Seal the day and year first above written.

CAREY M. KAUFMAN NOTARY PUBLIC for the State of Montana Residing at Helena, Montana My Commission Expires January 30, 2022

STATE OF MONTANA

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Notary Public for State of Montana **Residing in Helena**, Montana My Commission expires 1/30

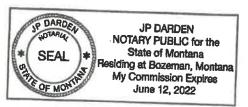
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COUNTY OF Gallatin On this ZStuday of Januar V, 2021, before me, a Notary Public for the State of Montana, personally appeared Greg Allen, Manager, 317 Cruse Partners, LLC, known to me or proved to me to be the person whose name is subscribed to the foregoing instrument, and acknowledged to me that he executed the same.

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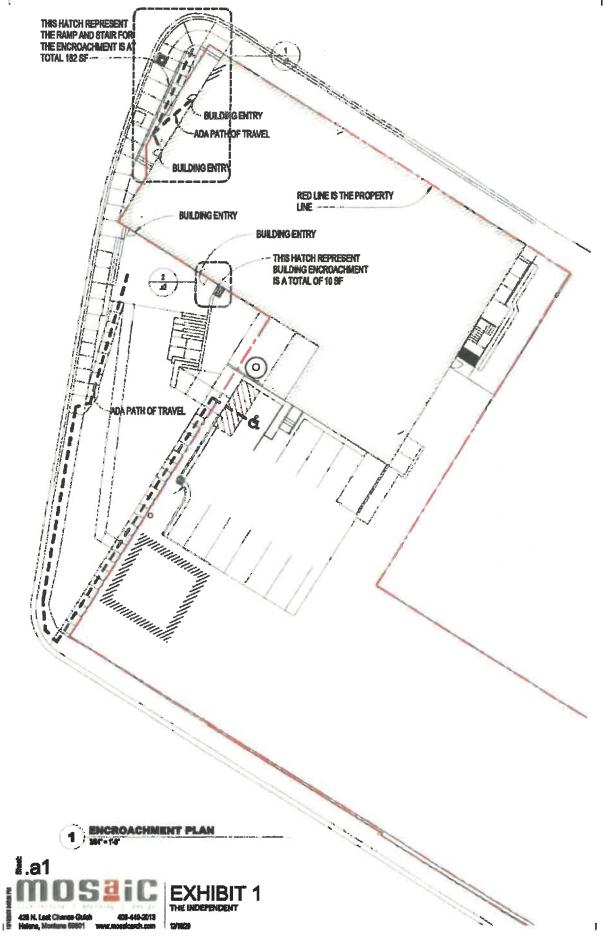
IN WITNESS WHEREOF, I have hereunto set my hand and affixed my Notarial Seal the day and year first above written.

(SEAL)

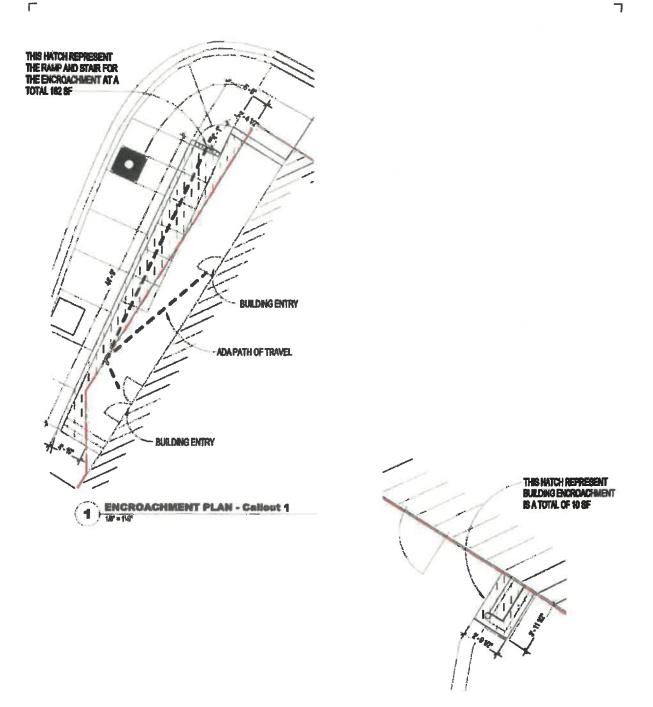


Notary Public for State Montana Residing in 100 Zeman My Commission expires: 64/1Z

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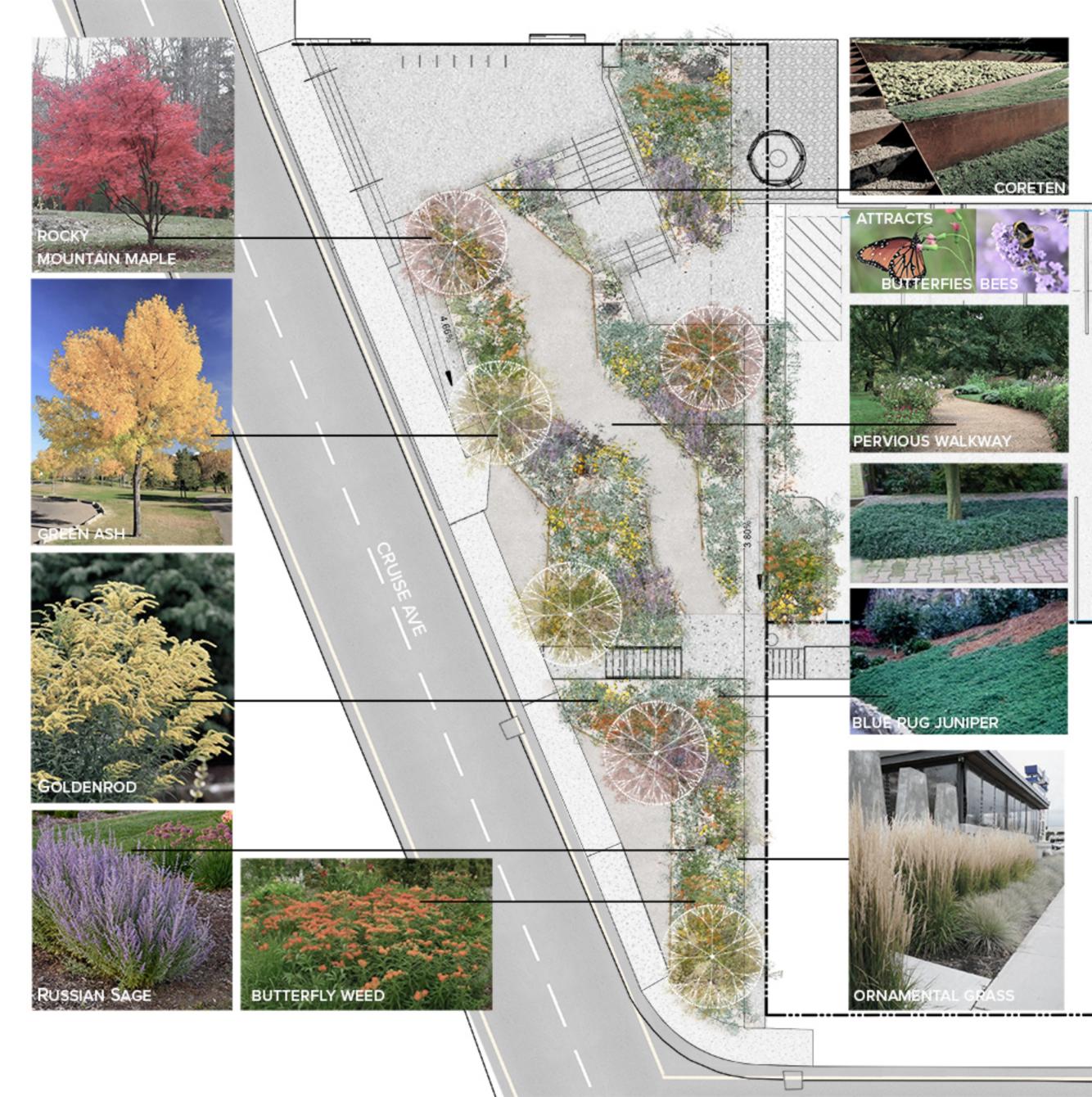
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(2) ENCROACHMENT PLAN - Cellout 2



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Union Market Water, Stormwater, and Sidewalk Infrastructure Application



IMPORTANT: COSTS TO BE PAID WITH DOWNTOWN URBAN RENEWAL DISTRICT FUNDS MAY NOT BE INCURRED BY THE APPLICANT PRIOR TO FUNDING APPROVAL AND THE SATISFACTION OF ANY CONDITIONS OF SUCH APPROVAL.

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Project Name: Union Market Building Water Line Replacement Date Submitted:

APPLICANT INFORMATION

Name (First & Last): Seth Branc	lenberger		
Address: 1426 Jerome Pl			
City: Helena	State: MT	Zip Code: 59601	
Phone:	Cell: <u>406-465-3504</u>	Other:	
Email: brandenbergerseth@g	gmail.com		

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

A non-profit or charitable institution/corporation

A partnership or corporate entity known as Union Market Properties LLC

District Resident

Local Government

Other (explain)

PROJECT INFORMATION

Building Address: 101-111 E Sixth, Helena, MT 59601

Legal Description: Helena Townsite 1869, S30, T10N, R03W; PROP ID NO.: 1616 01-1D: Tax Distr 01 TIF HLNA URB

PROPERTY OWNER INFORMATION

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

Property Owner (First & Last): Seth & Stephanie Brandenberger

Address: 1426 Jerome Pl			
City: Helena	State: MT	Zip Code: 59601	
Phone:	Cell: 406-465-3504	Other:	
Email: brandenbergerseth@g	gmail.com		



	È Last):	
Address:		
City:	State:	Zip Code:
Phone:	Cell:	Other:
Email:		

Company/Institution:			
Point of Contact (First 8	i Last):		
Address:			
City:	State:	Zip Code:	
Phone:	Cell:	Other:	
Email:			

PROJECT CONTRACTOR INFORMAT	TION (WHERE APPLICABL	.E)
Company/Firm: Montana City F	Plumbing	
Point of Contact (First & Last): Ch	nris Drake, P.E.	
Address: 1196 Highway 282		
City: MT City	State: MT	Zip Code: 59634
Phone: 406-449-2400	Cell:	Other:
Email:		

DESCRIPTION OF PROJECT

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

PROJECT RENDERINGS (IF APPLICABLE)

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



TOTAL COST OF THE PROJECT

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

PROPERTY OWNERSHIP

Do you own the property or are you currently purchasing it? Explain. We have owned the property since 2006.

JOB CREATION

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

The Union Market Building is the home of six independent small businesses. This includes two restaurants, a cabinet/kitchen designer, a hair salon,

PROJECT COMPLETION

What is the expected completion date of the project? June 2022

PROPERTY TAXES

How much are the current annual property taxes including any improvements? Is the payment of taxes current? **\$9,110.94 Taxes are current.**



PROJECT COST & FINANCING SECTION

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

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

PROJECT COST WORKSHEET

Stephanie Brandenberger is a licensed MT Prof Engine	ər	\$
· · · · · · · · · · · · · · · · · · ·		\$
	ubtotal	ş 0.00
onstruction/Rehabilitation Costs		
Replacement of potable water line including backflow prevention and sidewalk replace	ment	_{\$} 28,340.00
Re-piping of roof-drain to storm sewer		ş 12,980.00
•		\$
		\$
•		\$
-		\$
S	ubtotal	\$ <u>41,320.00</u>
rinting, Advertising, etc.		
		\$
		\$
· S	Subtotal	ş <u>0.00</u>
ther Miscellaneous Costs		
Interior backflow plumbing pad, subsurface wall in-fill, project management, escalation costs, additonal sidewalk completion.		\$ <u>10,000.00</u>
		\$
	Subtotal	s 10,000.00

Total \$ 51,320.00



PROJECT FINANCING WORKSHEET	
Owner/Developer Investment	
Total Investment	\$ 10,000.00
Request for Eligible items	
Total TIF Requested	\$ 41,320.00
TOTAL PROJECT FINANCING	ş 51,320.00

PROJECT NARRATIVES SECTION:

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

Seth Brandenberger Union Market Properties LLC 1426 Jerome Pl Helena, MT 59601

City of Helena Downtown Urban Renewal District TAX INCREMENT FINANCING APPLICATION FORM

DESCRIPTION OF THE PROJECT:

Compliance with the Downtown URD Plan

This funding request is for replacement of water, storm-sewer and sidewalk infra-structure in the Downtown Urban Renewal District

Seth and Stephanie Brandenberger have owned the Union Market Property since 2006 first as coowners, and as full owners since 2012. The building owners are fully invested in downtown Helena. In addition to the building, they have owned a residence in the Helena City limits since 1993. Seth Brandenberger attended all of Downtown Masterplan development meetings and has supported the BID and the development of the Downtown Urban Renewal TIF District.

The Project adds to downtown vibrancy with a mix of uses:

The Union Market Building adds to downtown vibrancy with a mix of six small businesses located in ground-floor storefronts. There are two thriving restaurants, a hair salon, an exercise studio, a kitchen design and cabinet shop and an art studio. The building lot includes seven parking spaces on the south side that boarder the city parking between the building and the Jackson St Parking Garage.

Upgrades Underperforming Properties:

When we purchased the property in 2006, there were two remaining tenants in the six-unit building. Through hard work and fair rental rates, we have maintained full occupancy for most of the past 15 years. The water service infrastructure is aging and unable to reliably meet the needs of tenants. The proposed project is a very necessary improvement to maintain tenant business viability and improve the property.

Invests in Infrastructure needed for development:

The TIF funding requested is for the following infrastructure:

1. Replacement of a ³/₄-inch lead service line with 1-1/2 inch copper from the City water main to the building. The service line provides all of the potable water to the building.

The lead service line to the Union Market Building likely dates to before 1925. It's possible that the existing lead service line to the Union Market Building is over 100 years old. The line is undersized for current building occupant use. Lead water supply piping is a potentially hazardous source of lead in drinking water. Lead pipes can leach particles of the neurotoxin into

the drinking water. More recent plumbing code and Section of the Safe Drinking Water Act prohibits the "use of any pipe, any pipe or plumbing fitting or fixture, any solder, or any flux, after June 1986". Lead service lines similar to the one connecting to the Union Market resulted in the nationally publicized lead contamination issues in Flint, Michigan. Lead in drinking water has been linked to developmental delays in children and can damage the brain, red blood cells and kidneys.

The existing service line also has a broken curb stop which means that there is no means to shut the water off outside the building without excavating to the water main in the middle of Jackson Street. Failure of the service line could result in an uncontrollable subsurface leak that could undermine the building foundation, the sidewalk and the street.

Additionally, there is no backflow prevention installed on the water entrance. A **backflow prevention device** is necessary to protect City potable water from contamination or pollution that could occur in the event of a pressure drop. Reduced pressure in the pipe may allow contaminated water to be drawn into the City water main.

2. Replacement of roof drain piping to re-direct the roof drainage from sanitary sewer to storm sewer.

The second part of this project will re-direct storm-water from the roof drain which drains the entire 6,851 square foot roof. The roof drain for the entire building currently drains into the sanitary sewer. This means that clean rain water is being directed into the city treatment plant to be treated as raw sewage. The unnecessary treatment of this water is an extra expense to the city. Redirecting the roof drain to the city storm water system, will reduce the load on the City treatment plant.

3. Replacement of hazardous sidewalk covering the water line and an underground vault.

Completion of the project will require replacement of a section of sidewalk on the west side of the building that has been identified as hazardous by the city. The section of side walk is broken, uneven and does not meet current ADA regulations.

Improves Transit, Pedestrian and Bike Connections:

The replacement of the sidewalk will address the safety issues for pedestrians and improve pedestrian connection to the adjacent parking facilities.

Create a Quality and Unique Experience:

The Union Market Building is over 120 years old. This historic building (not registered) was originally a butcher shop and grocery store in the location of the current Pita Pit Restaurant, with five other small business storefronts. It is an asset to the downtown character and history.

As the building owner, I personally attended the Helena Parking Commission Meeting to request improvements to the then unfinished concrete wall on the north side of the Jackson Street Parking

Garage. This ultimately resulted in an art grant being advertised for the Gold Miner Mural that is now painted on the wall.

Tenant Dislocation:

The Project will be completed without dislocating existing tenants. It is anticipated that any interruption of services will be completed during days when most of the tenant businesses are closed and will be restricted to a few hours.

LOGISTICAL CONSIDERATIONS:

Two estimates for the proposed project work have been obtained from reputable local contractors. The City plumbing inspector has been in the building at our request and is aware of the building water and storm sewer infrastructure needs.

The owners are fully capable of managing this project. Seth Brandenberger is a full-time Design & Construction Project Manager for the State of Montana. Stephanie Brandenberger is a Licensed Professional Engineer with the State of Montana.

The owners commit to covering any cost escalations and unanticipated expenses that may occur due to unknown conditions when the project bids were submitted.

All property taxes, special improvement district assessments, and other assessments on the project property are paid to date.

The construction cost of this project is significant due to the number of conflicting utilities under Jackson Street. Subsurface utilities include water, sanitary sewer, storm sewer, electric and telecommunications serving buildings on the east and west sides of the street. The number of utilities limits backhoe work and require special excavation equipment such hydro-evacuation.

Economic & Community Development Potential:

- a. <u>Tax Generation</u>: The utility updates that will be completed as the result of this TIF Grant funded project will increase the value of the taxable value of the property and the taxable income.
- b. <u>Relationship of public and private investment:</u> The Union Market Building was in extremely poor condition when purchased by the current owners in 2006. The building had become an eyesore with deteriorating paint and vacant storefronts. As building owners, we have invested very significant private money on upgrades to the building to date. The building upgrades are necessary to attract tenants and to maintain a safe and attractive building. Public investment to help with the infrastructure helps to leverage funds necessary to complete repairs and updates to the building.
- c. <u>Job Creation</u>: There are six small independently owned businesses in the building. Many of these businesses have several employees. These jobs are at risk in the event of building infrastructure failure.
- d. <u>Investment Spin-off:</u> As the infrastructure is improved, more money is left for the upkeep of building. This in turn increases the value of surrounding properties.
- e. <u>Cost Benefit Analysis:</u> Following are some average lifespans from the US Department of Housing and Urban Development for the different types of metals used for main <u>water lines</u>:
 - Copper 50 years
 - Galvanized steel 20-50 years
 - Cast iron 70-100 years
 - PVC (polyvinyl chloride) indefinite

• Lead - 75-100 years

Based simply on material life-span, there is a very high risk that the water and sewer lines to the Union Market Building will fail in the near future. A failure of the water service line beneath Jackson Street could result in significant damage to the street subgrade, adjacent utilities and adjacent buildings.

The loss of the only water line serving the building would result in the complete shut-down of six small businesses. This business loss could be a financial ruin for some of the business and for the building owners.

f. <u>Health and Safety Concerns:</u> Lead pipes can leach particles of the neurotoxin into the drinking water. More recent plumbing code and Section of the Safe Drinking Water Act prohibits the "use of any pipe, any pipe or plumbing fitting or fixture, any solder, or any flux, after June 1986". Lead service lines similar to the one connecting to the Union Market resulted in the nationally publicized lead contamination issues in Flint, Michigan. Lead in drinking water has been linked to developmental delays in children and can damage the brain, red blood cells and kidneys.

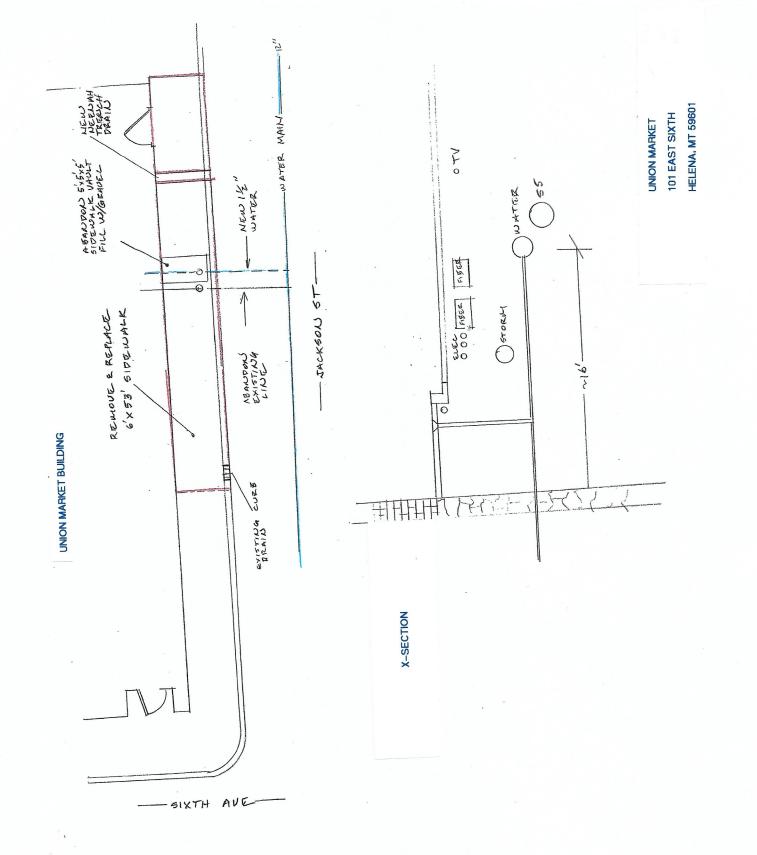
The existing service line also has a broken curb stop which means that there is no means to shut the water off outside the building without excavating to the water main in the middle of Jackson Street. Failure of the service line could result in an uncontrollable subsurface leak that could undermine the building foundation, the sidewalk and the street.

Additionally, there is no backflow prevention installed on the water entrance. A **backflow prevention device** is necessary to protect City potable water from contamination or pollution that could occur in the event of a pressure drop. Reduced pressure in the pipe may allow contaminated water to be drawn into the City water main.

- g. <u>Historic Preservation:</u> The Union Market Building is approximately 123 years old. This historic building was originally a butcher shop and grocery store in the location of the current Pita Pit Restaurant, with five other small business storefronts.
- h. Density, Infill, and Adaptive Reuse: The Project does not increase density in the DURD.
- i. <u>Cost of Public Services</u>: The purpose of this project is to improve public services including water, sewer and sidewalks.
- **j.** <u>Housing Component:</u> The improvements to the Union Market Building help to make the Downtown area a more desirable place to live.
- <u>Conformance with Requirements for TIF Fund Expenditures, per 7-15-4288, M.C.A.</u>): The proposed project conforms with the following requirements: No. 4.: The construction, and improvement of public improvements or infrastructure including Curbs, gutters, sidewalks, storm sewers, waterlines, and items of personal property to be used in connection with improvements for which the foregoing costs may be incurred; No. 12.: The acquisition, construction, or improvement of facilities or equipment for reducing, preventing, abating, or eliminating pollution

Potable Water Line Replacement & Backflow

	Qty.		Units	Cos	st/Unit	Extended Cost		
Curb & Gutter		53	LF	\$	35.00	\$	1,855.00	
4" Concrete Sidewalk		35.3	SY	\$	90.00	\$	3,177.00	
Neenah Sidewalk Trench Drain		7	LF	\$	110.00	\$	770.00	
Montana Underground Quote						\$	19,320.00	
HD Plumbing Quote							\$5,596.00	
Total HD Plumbing & MUC:						\$	30,718.00	
Total Montana City Plumbing						\$	28,340.00	
Roof Storm Drain Quote								
						<u>,</u>	4 4 4 6 00	
HD Plumbing roof drain						\$	4,446.00	
-Overflow roof drain (estimated)					\$	4,446.00	
Total HD Plumbing:						\$	8,892.00	
						\$	12 000 00	
Total Montana City Plumbing						Ş	12,980.00	



NORTH

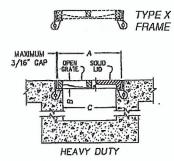
Page 1 of 2



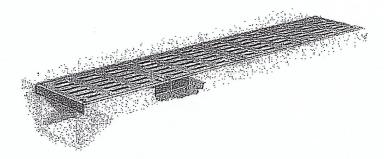
R-4999 Series

Heavy Duty Trench

Materials: All frames and grates/lids are furnished standard in Gray Iron, Class 35-B for heavy-duly use. For extra heavy-duty use or superior durability requirements, see our Airport and Port Grating Series and our R-4993 & R-4994 Series.



General schematic shown may not apply to all designs. Bar and rib depths, plate thicknesses, and seating widths vary on different sizes and styles. If your project has design restrictions, contact your sales representative or product engineering.



Illustrating Type C bolted trench. Bolted trench sections are furnished in 24" standard lengths. When bolted trench is furnished, they are shipped assembled – AT NO TIME should the units be disassembled during installation. When removing covers, do not mix or rotate 180 degrees as bolt holes may lose alignment and improper bearing may occur.

	Un-bolted Catalog No.	Bolted Catalog No.	A	8	С	Туре А	Туре С	Type D	Туре Е	Туре Р	Туре Q
	R-4990-AX	R-4999-AX	8	1-1/2	6	×	x	X	x	X	1999 March 49 March 1990 March 2010 March 201
	R-4990-BX	R-4999-8X	10	1-1/2	8	×	x	x	x	x	
\rightarrow	R-4990-CX	R-1999-CX	12	1-1/2	10)	x	×	(x)	x	x	x
/	R-4990-DX	R-4999-DX	14	1-1/2	12	×	×	×	x	×	x
	R-4990-EX	R-4999-EX	17	1-1/2	15	×	x	x	x	x	
	R-4990-FX	R-4999-FX	20	1-1/2	18	x	x	×	 х	×	
	R-4990-GX	R-4999-GX	23	1-1/2	21	x	x	x			
	R-4990-HX	R-4999-HX	26	1-1/2	24	x	x	x	x		x
	R-4990-JX	R-4995-,1X	30	2	27	x	x	x		•	
	R-4990-KX	R-1999-KX	33	2	30	x	x	x	x		•
	R-4990-LX	R-4999-LX	36	2	33	x	x	x			
	R-4990-MX	R-4999-MX	39	2	36	x	x	x	•		
	R-4990-NX	P-4999-NX	45	2	42	x	. x	x			
	κ – indicatos av	allability									

http://www.nfco.com/municipal/products/print-hshl/

Page 2 of 2

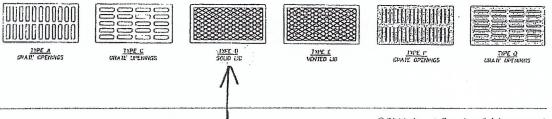
Un-bolled Gatalog No.	Bolled Catalog No.	A	B	С	Туре А	Туре С	Type D	Τγρε Ε	Туре Р	Тура Q	
R-4990-OX	R-4999-OX	51	2	48	x		x			************	
x - indicates av	ailability										

Read Carefully Before Ordering

The various slandard trench drains are available with a number of alternatives. It is important to examine all of the variables carefully and specify your requirements fully. Your order will be entered correctly and promptly if includes the following information:

- · Complete catalog number
- · Frame and pieces, when required
- Type of lid or grate: A, C, D, E, P or Q
- Length of trench sections
- Angles and intersections *
- Load requirements

* Trenches wilh angles, intersections, size changes, or other special requirements require detail drawings prior to ordering. Contact your sales representative or product engineering for assistance.



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We are pleased to quote the following project

Project: Union Market Water Entry and Storm Drain Piping Date: 07/01/2021

PRICE INCLUDES:

- Mobilization
- City of Helena permits
- Demo of existing ³/₄" water entry and water main back to the exterior City main.
- Includes replacement of the domestic water entry to meet City of Helena Requirements.
- Connect new water entry to existing ³/₄" building main.
- Underground plumbing of building service to support utility work.
- Excavate Water Line.
- Compact & Backfill Water Line.
- Prep & Pour Sidewalk.
- Prep & Pour Curb & Gutter.
- Prep & Replace Asphalt.
- New primary and overflow drains to the south exterior wall the exterior discharge using a downspout nozzle.
- Piping insulation of new water entry and storm drain. Includes PVC jacket on storm drain piping.

\$ 18,560.00
\$ 9,780.00
\$ 12,980.00
\$ 41,320.00

Eliminate Water Entry Bypass - \$ 3,580.00

EXCLUDES:

- Any roof patching and repair
- Bonds (We are bondable if required)
- Any painting of piping and ducting
- Any high voltage electrical
- Exterior concrete equipment pads
- Radon gravel and vapor barrier
- Fire Protection Systems



Montana Underground Construction, Inc.

5690 Glass Drive Helena, MT 59602 406-431-1771

Estimate

Date	Estimate No.
10/1/2021	41092

Name/Address

Pita Pit Water Service 101 E 6th Ave Helena, MT.

Description	Qty	Units	Total
Mobilization, Bonding, and Insurance		LS	2,750.00
Asphalt Paving PG 58-28	150	SF	3,060.00
Non Shrink Concrete 1 sack	10	CY	1,690.00
Traffic Control	1	LS	1,600.00
Curb and Gutter	20	LF	1,410.00
Sidewalk Removal			0.00
Cost will be determinied on a time and material basis.			
Hydro Excavate Water Service	1	LS	8,810.00
MUC is unable to quote the sidewalk replacement. The following companies are local contractors that will be able to provide quotes for raised sidewalk replacement: Steed Industries, Josh Steed (406) 696-0820 or Jay Steed (406) 558-9203 Arco Builders, Jason Armstrong (406) 442-1999			
The following estimate is good for only 30 days at which time void.	e estimate is	Total	\$19,320.00

Phone # 406-495-9410 HD Plumbing & Heating Inc. PO BOX 7402 Helena, MT 59604 4064497335 h-d.plumbing@hotmail.com



Estimate

ADDRESS

Seth Brandenberger Union Market Properties LLC 1426 Jerome Pl. Helena, MT 59601

P.O.

101 E 6th Ave

DESCRIPTION	QTY	AMOUNT
Run new 1 1/2 copper service from main in street to in side building with new meter , backflow, and pressure reducing valve.		
1 1/2 K Copper 1 1/2 Watts PRV 1 1/2 Watts 009 backflow 1 1/2 Curb stop and Box Saddle and corp stop Permit		
Estimate		5,596.00
Run new rough drain line to out side the building with tear drop trim on the outside		

8" PVC Zurn tear drop **PVC** fittings Hangers

ESTIMATE # 1020 DATE 09/15/2021

	TOTAL		\$10,042.00
			4,446.00
Estimate			
DESCRIPTION		QTY	AMOUNT

Accepted By

Accepted Date

Penwell Building ADA Accessibility Improvements Application

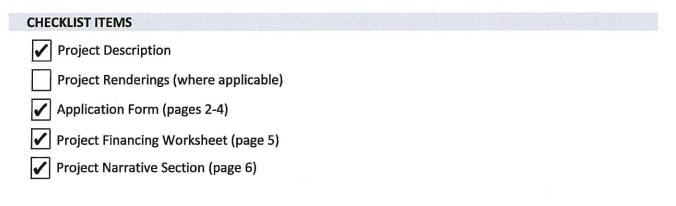


IMPORTANT: THERE IS A MATCH REQUIREMENT OF UP TO 50% WITH AN OPTION FOR EXEMPTION FOR DEMONSTRATED HARDSHIP. COSTS TO BE PAID WITH DOWNTOWN URBAN RENEWAL DISTRICT FUNDS MAY NOT BE INCURRED BY THE APPLICANT PRIOR TO FUNDING APPROVAL AND THE SATISFACTION OF ANY CONDITIONS OF SUCH APPROVAL.

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

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

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





Project Name: Penwell Building Accessibility Upgrades Date Submitted: 12-15-2021

APPLICANT INFORMATION

Name (First & Last): Joe Mueller

Address: 1060 HELENA AVE

City: Helena Phone: 406-431-3034

_ State: <u>MT</u> Cell: 406-431-3034 _____ Zip Code: 59601

Other:

Email: brokerjoe@bresnan.net

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

A non-profit or charitable institution/corporation

X A partnership or corporate entity known as American Real Estate Holdings LLC

District Resident

Local Government

Other (explain)

PROJECT INFORMATION

Building Address: 34 W. 6th Avenue

Legal Description: HELENA TOWNSITE 1869, S30, T10 N, R03 W, BLOCK 405, Lot 3, 250549 PARCEL 100 AKA W 20' LTS 3 & 4, PT 15,17,18, W 20' LT 22

PROPERTY OWNER INFORMATION

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

Property Owner (First & Last): American Real Estate Holdings LLC (Joe Mueller)

Address: 1060 HELENA AVE

City: Helena	State: MT	Zip Code: 59601
Phone: 406-431-3034	Cell: 406-431-3034	Other:
brokariaa@broanan not		

Email: brokerjoe@bresnan.net



PROJECT ARCHITECTURAL FIRM INFORMATION (WHERE APPLICABLE)

Company/Firm: Dowling Architects

Point of Contact (First & Last): Matt Friedmeyer

Address: 734 N. Last Chance Gulch

City: Helena		State: MT	Zip Code: 59601	
Phone:	406-457-5470	Cell:	Other:	

Email: mfriedmeyer@dsa-mt.com

PROJECT FINANCIAL LENDING INSTITUTION (WHERE APPLICABLE)

Company/Institution: Stockman Bank

Point of Contact	(First & Last):	Jim Dormady
------------------	-----------------	-------------

Address: 5 W Lyndale Ave

City:	Helena	State: MT	Zip Code: 59601

Phone: 406-447-9055 Cell: Other: _____

Email: jim.dormady@stockmanbank.com

PROJECT CONTRACTOR INFORMATION (WHERE APPLICABLE)

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

DESCRIPTION OF PROJECT

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

PROJECT RENDERINGS (IF APPLICABLE)

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



TOTAL COST OF THE PROJECT

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

\$235,000 for installation and purchase of a LU/LA Elevator. Restroom upgrades to comply with the ADA. Entry ramps at two entrances. Facade repair and new storefront.

PROPERTY OWNERSHIP

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

The property is currently owned by the applicant.

JOB CREATION

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

By providing accessible access to each suite individual tenants will have the ability to hire and expand services to those who may need assistance.

PROJECT COMPLETION What is the expected completion date of the project? Spring/Summer of 2022

PROPERTY TAXES

How much are the current annual property taxes including any improvements? Is the payment of taxes current? 2021 Taxes are \$10,852.18. Improvements have not been assessed. Taxes are current and paid.



PROJECT COST & FINANCING SECTION

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

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

PROJECT COST WORKSHEET		
Professional Services		
1. Dowling Architects		\$ <u>20000</u>
2. Stahly Engineers		ş 5000
	Subtotal	ş 25000
Construction/Rehabilitation Costs		
1. Elvoron LU/LA Elevator		\$ <u>120000</u>
2. Elevator Shaft Construction		ş 35000
3. ADA Restroom upgrades		ş 25000
4. Entry platforms & new storefront windows/doors		ş 20000
Temporary construction barriers		\$ 5000
Paint and Repair Parapet/Cornice on Facade		ş 5000
	Subtotal	ş 210000
Printing, Advertising, etc.		
N/A		\$
		\$
	Subtotal	ş 0
Other Miscellaneous Costs		
Ν/Α		\$
		\$
	Subtotal	ş 0
TOTAL PROJECT DEVELOPMENT COSTS		
Total \$ 235000		



PROJECT FINANCING WORKSHEET	
Match Requirement	
Does the applicant intend to match 50% of the total pro-	ject cost?
🔀 Yes 🗌 No	
If no, please identify the community benefits that will b	e gained from the proposed project.
1. Local Investment in the downtown.	
2. Rehabilitation of a historic property.	
3. Customers and employees gain accessible access to sp	Daces.
4. More tenants downtown brings increased activity.	
5. See attached narrative as well for additional benefits.	
Owner/Developer Investment	
Is the applicant proposing to invest a portion of the total proje	ct cost?
Yes No	
If yes, how much does the applicant propose to invest?	\$ <u>117500</u>
Other Funding Sources (if applicable)	
1. <u>N/A</u>	\$
2	\$\$
3	\$
Request for Eligible items	
Total TIF Requested	\$ 117500

TOTAL PROJECT FINANCING \$ 235000



PROJECT NARRATIVES SECTION:

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



PROJECT NARRATIVES SECTION (CONTINUED):

- 3. Economic & Community Development Potential: Provide a brief narrative for the following. If not applicable, please note:
 - a. <u>Tax generation</u>: Describe how the project will increase the taxable valuation in the District.
 - **b.** <u>Relationship of public and private investment</u>: Describe the relationship of private investment to public investment of a project and discuss how it is a prudent investment of public funds within the urban renewal district.
 - c. <u>Job Creation</u>: Are there any jobs created as a result of the project? Please describe.
 - **d.** <u>Investment Spin-off</u>: Describe any potential for investment spin-off having a positive impact on the District.
 - e. <u>Cost-Benefit Analysis of the Investment/Expenditure</u>: For projects that are \$10,000 or more, a cost-benefit analysis should be completed.
 - f. <u>Health and Safety Concerns</u>: Describe the project's impact, positive or negative, on the environment in terms of noise, dust, pollution, public safety, traffic congestion, pedestrian access, visual aesthetics, etc.
 - g. <u>Historic Preservation</u>: Describe the project's ability to preserve and protect the cultural and economic heritage and physical assets of the district.
 - **h.** <u>Density, Infill, and Adaptive Reuse</u>: Describe if the project increases density in the DURD through infill and adaptive reuse of existing property(s).
 - i. <u>Cost of Public Services</u>: Describe how the projects will improve public services such as water, sewer, sidewalks parking, improved traffic circulation, etc., to an area currently underserved.
 - j. <u>Housing Component</u>: Describe any housing components to the project. One of the main goals of the Downtown Neighborhood Plan and the Downtown URD Plan is to promote all types of housing in the area.
 - **k.** <u>Conformance with Requirements for TIF Fund Expenditures, per 7-15-4288, MCA: Projects</u> must cover eligible project activities stated in Montana state statutes (See Attachment A).

Attachment A

ELIGIBLE ACTIVITIES

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

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

			-	
		Attachment B Goals of the Downtown URD		
•	A	dd to downtown vibrancy with a mix of uses	\vdash	
	0	Provide a range of housing for a range on incomes		
	0	Attract new business types that support residential uses		
	0	Encourage new business startups		
	0	Conduct feasibility, market and other studies		
	0	Encourage ground floor active use		
	0	Add to improve urban landscaping with pubic art, trees and planting		
٠		pgrade Underperforming properties		
	0	Develop vacant lots and encourage upgrades to under-performing		
		property gaps		
	0	Encourage the update and adaptive re-use of buildings for 21st century		
		needs, such as open interiors, improvements to broadband, and for safety		
		and market competitiveness		
	0	Encourage redevelopment of parking facilities that create gaps in		
		downtown ground-floor retail by allowing for non-parking uses on floor		
		level and parking on other stories		
	0	Facilitate façade improvements		
	0	Inventory city properties with potential for higher use and develop criteria		
		for disposition		
	0	Provide for demolition and site preparation as needed to upgrade		
		properties		
	la	vest in infrastructure needed for development	_	
•		Improve transportation infrastructure for better function and safety for		
	0	vehicles, pedestrians and bicycles and include street scape features to		
		improve aesthetics, safety and quality for non-motorists		
	0	Rectify issues of parcels along and within streets that were not properly		
	0			
	6	surveyed Address improvement needed for fire suppression water		
	0	flow requirements for higher densities; improve fire engine access and		
		prioritize replacement of older segments of pipe for water and sewer		
	6			
	0	Facilitate storm drainage, and continue to address capacity issues and alternative detention features		
	~			
	0	Expand Fiber capability		
	0	Invest in capital improvements needed for parks and open spaces		
	0	Manage parking for optimal efficiency and unitization		
	0	Retain and address needs of existing city-owned cultural and historic facilities		
		Tacilities		
•	Im	prove Transit, Pedestrian and Bike Connections	\uparrow	
	0	Improve pedestrian and bike facilities		
	0	Develop a comprehensive bike network		
	0	Improve vehicle circulation and access to increase retail viability		
	0	Improve gateways and wayfinding		
	0	Increase transit options		
	0	Improve pedestrian connections from parking facilities to destination		10 m

Att	achment B Goals of the Downtown URD (Continued)	
•	Create a quality and unique experience	
	 Make improvements to attract more businesses 	
	• Encourage ground-floor transparency	
	 Capitalize on downtown's historic assets 	
•	Stimulate Vibrancy with a Mix of Uses (Rodney Street Goal)	
	 Retain the neighborhood character allowing for mixed uses, a variety of 	
	residential types and a central commercial area	
	 Keep the area primarily residential with a range of housing types 	
	intermixed with offices and government uses	
	o Increase residential capacity	
	o Retain the Rodney Street Commercial Center as the primary area for	
	retail, with the potential for housing and offices in the upper floors	
•	Reinvigorate the Rodney Street Commercial Center (Rodney Street Goal)	
	 Retain and build the Neighborhood Center as the center for retail, commercial and social gathering 	
	 Improve Rodney Street functionality, infrastructure and aesthetic between 6th and Broadway 	
	 Create gateways with wayfinding at both ends of the commercial center 	
	 Create better linkages between the courthouse complex, Myrna Loy center and Rodney Street 	
	 Incorporate public art that differentiates the area from Downtown tonto a fun and funky interactive way 	
	 Monitor parking demand and identify potential for temporary uses or longer term uses 	

DOWLING ARCHITECTS

December 19, 2021

Community Development Department City of Helena 316 N. Park Avenue Helena, MT 59623

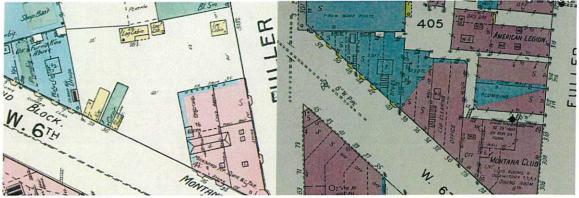
citycommunitydevelopment@helenamt.gov

RE: Downtown Urban Renewal District TIF Grant Application

Downtown Urban Renewal TIF Committee,

Since American Real Estate Holdings purchased the building in 2019, they have been making strides in the downtown area by maintaining ground-level activity during the Pandemic while continuing to invest in the building. The Penwell building had its last major renovation in 1972.

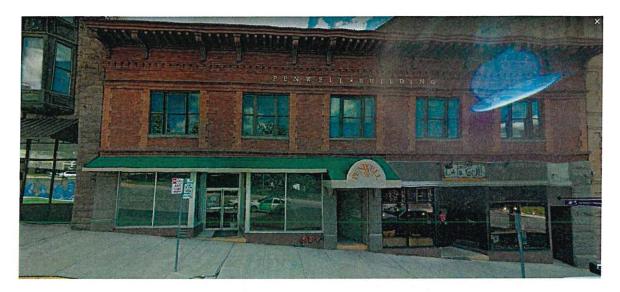
The building is located between the Diamond Block and Montana Club; two of Helena's most notable and historic buildings. The Penwell was built a year after the Montana Club was re-built. The Penwell is a contributing property to the Helena Historic District.



1892 Sanborn Map

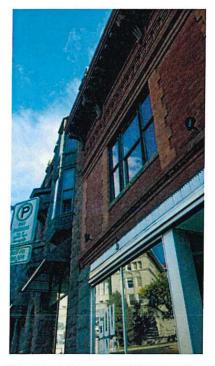
1930 Sanborn Map

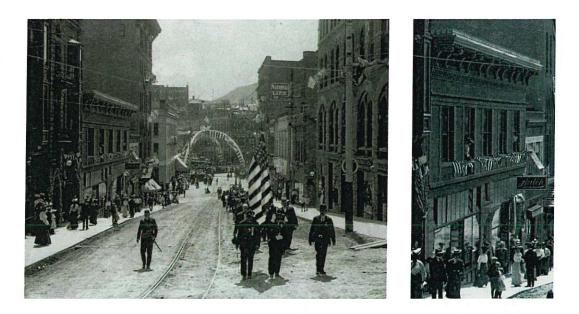
-Images from loc.gov



2018 Google Street View photo of the Penwell Building. The green canopies have since been removed to expose the stone archway located in the middle of the building leading to the second floor. In this project, the new elevator will be located at this central entrance and does not impact the façade.

From the NRHP Registration Form: "The Penwell Building (1906), Palmer Building (1906) and the Kohrs Block (1907) additionally illustrate the common, 2-part commercial block plan, with storefronts on the street level and office spaces upstairs. These buildings were constructed predominantly of brick, with restrained ornamentation. In addition to the red brick commonly used on late 19th-century buildings in Helena, other decorative brick including yellow-orange and brown often were employed on buildings after 1900"





An early parade route (Grand Army of the Republic Veterans) took place on W. 6th Avenue with the Penwell on the left in 1907. The downtown activity that took place in the early 1900's was a very different scene compared to today. On the right side of the street was the Electric Block which was demolished in 1974 and replaced with a parking garage.

The project aims to improve pedestrian activity along Sixth Avenue.

-Images from helenahistory.org

Description of work to be performed:

Exterior work includes two new platforms with railing and stairs. These will provide better accessibility to two of the four 6th Avenue entrances. The other entrances will be accessible by way of the new elevator. One suite will receive new insulated storefront windows and doors increasing energy efficiency and comfort in the space. Façade work includes painting and repairing the cornice and corbels located at the parapet. Those historic features of the building help to maintain curb appeal and value for both tenants and people visiting the downtown area. Interior work consists of remodeling multiple bathrooms to meet current ADA requirements. These upgrades coincide with the new elevator installation allowing accessible access to each floor of the Penwell Building.

Matt Friedmeyer-Rager, NCARB Dowling Architects Additional or Expanded Information requested:

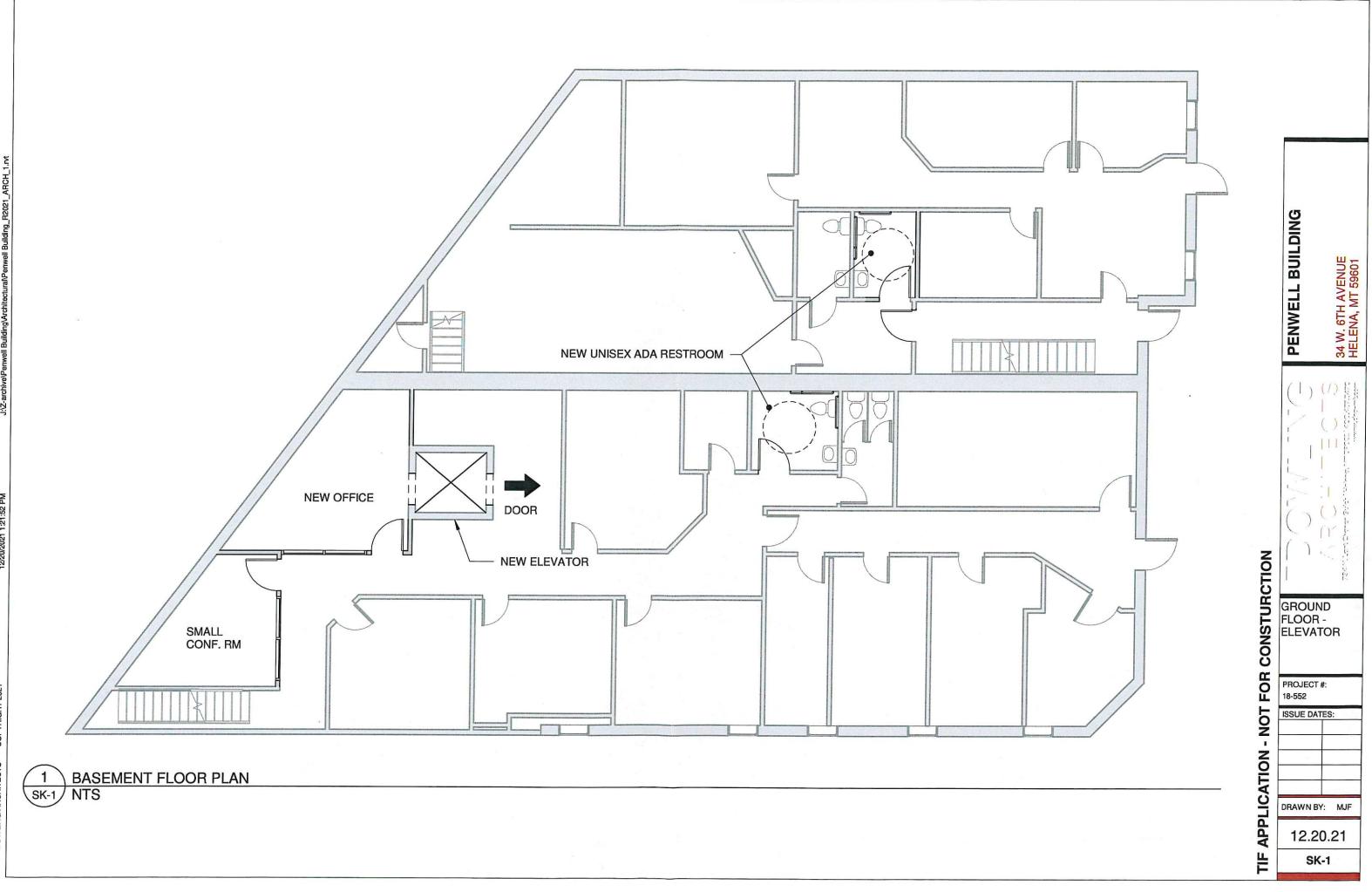
- 1. Description of Project
 - a. <u>Compliance with the Downtown URD</u>. Located on West 6th Avenue within the URD, the Penwell Building has been a part of Helena's historic fabric for over a century. With two distinct ground-level storefronts and office suites in the basement and second floor, the building encompasses multiple aspects of the URD.
 - b. Local Zoning and Other Requirements. The Penwell was built to zero lot lines as was typical in the early 1900s. An easement within the ROW is a component of this package that would allow even greater accessibility to the building while providing increased interaction with passersby by way of flat ramps to provide an adequate slope of the ground surface at entries to The Penwell. Change of use is not anticipated.
 - c. <u>Demolition/Deconstruction N/A</u>
 - d. Dislocation N/A
- 2. Logistical Consideration
 - a. Project Feasibility Financing for the project is through Stockman Bank.
 - b. <u>Applicants Ability to Perform</u> Financing, Construction Documents, General Contractor are all in place to begin construction.
 - c. <u>Timely Completion</u> The elevator is readily available and additional renovations will take place as soon as the project is permitted.
 - d. Payment of Taxes Taxes are current and paid.
- 3. Economic Development Potential:
 - a. <u>Tax Generation Renovations increase the taxable value of this property.</u>
 - <u>Relationship of public and private investment –</u> The private investment in the project will be at least \$117,500. With a public investment of 50% or \$117,500.
 - c. <u>Job Creation –</u> Leasable office space will become accessible as part of the project by allowing businesses to expand downtown. At least one hire by a

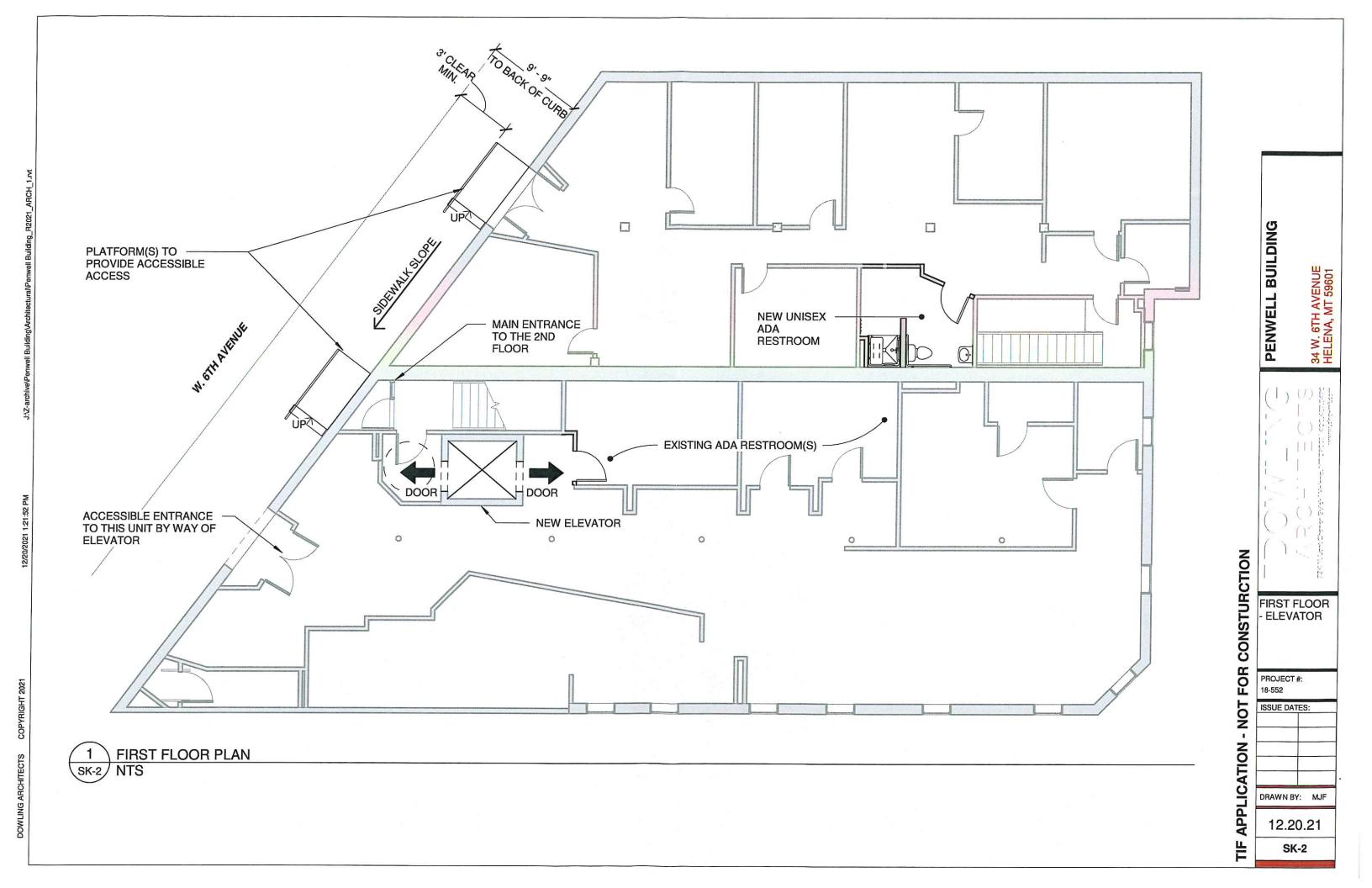
tenant has been able to remain at the office due to the elevator being provided.

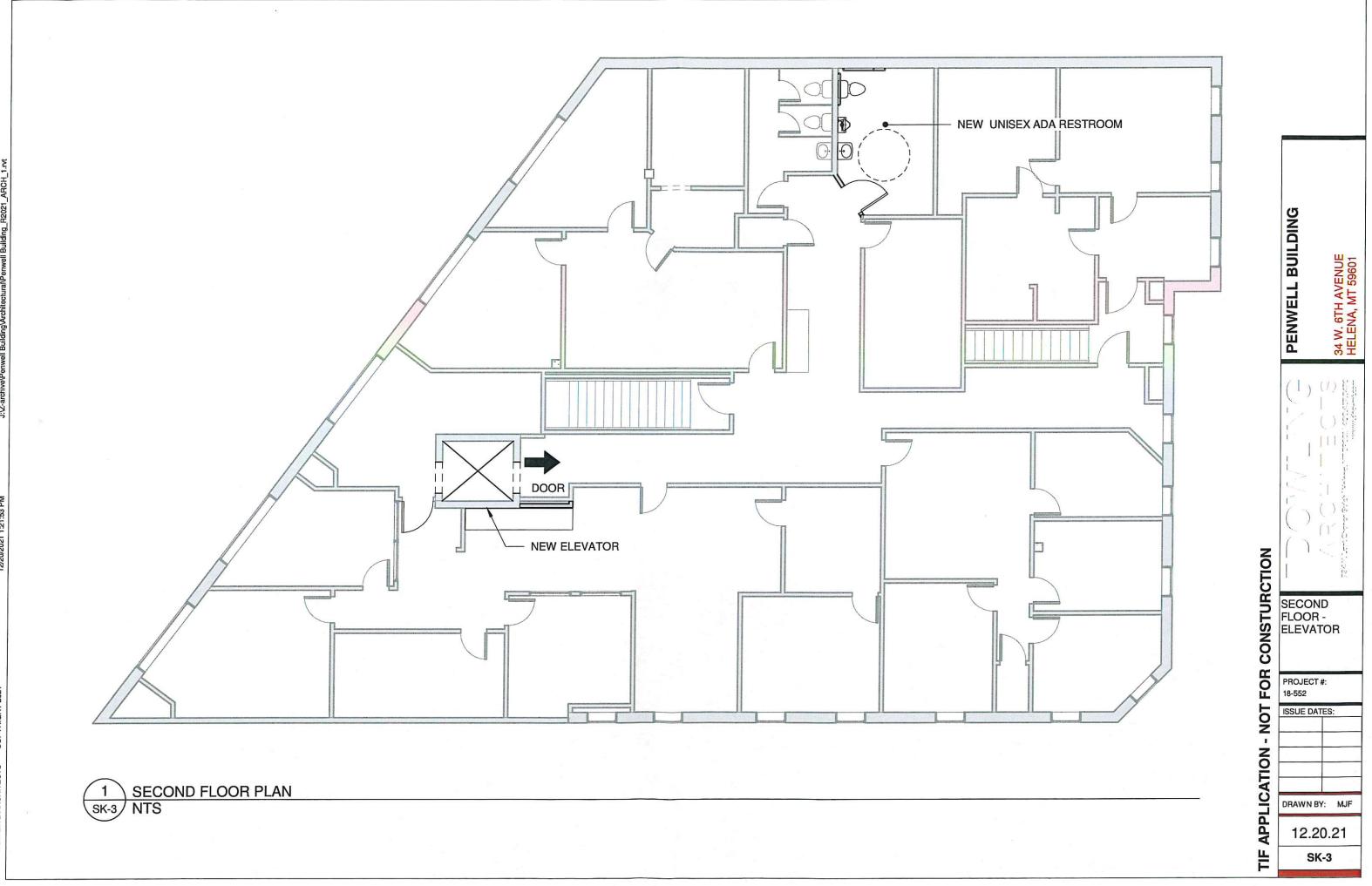
- d. <u>Investment Spin off –</u> Bringing additional business (through tenant leases) downtown will lead to economic benefit for the city.
- e. <u>Cost-benefit Analysis –</u> Through renovation, the project team can modernize The Penwell without sacrificing the building's historic integrity and irreplaceable craftsmanship. See the chart below for analysis.

Direct Cost	Indirect Cost	Direct Benefit	Indirect Benefit
Design & permit fees	Increased energy usage	Building appreciation	Improved tenant spaces
Construction costs	Temporary noise during construction	ADA compliance	Convenience

- f. <u>Health and Safety Concerns –</u> Removing architectural barriers enables greater universal access for the public.
- g. <u>Historic preservation –</u> The building's historic character will not be negatively impacted by the renovations.
- <u>Density</u>, <u>Infill and Adaptive reuse</u> Adapting the building to provide accessible spaces helps maintain The Penwell's economic benefit to the downtown community.
- i. Cost of Public Services There is no additional cost to public services.
- j. <u>Housing component</u> Currently the building functions as office space but if future needs dictate a housing element, through condominiums or apartments, the upgrades to the building would provide accommodations in the future and need not be removed.
- k. <u>Conformance with TIF Requirements</u> TIF funding relating to expenses generated from 7-14-4233 (Urban Renewal) conforms to the M.C.A.
- 4. Goals of the Downtown URD.
 - <u>Add to downtown vibrancy with mixed use</u>. By retaining quality tenants that are active in the community by providing them greater usability of their spaces the community on 6th Avenue will continue to be vibrant and enticing.
 - <u>Upgrade underperforming properties</u>. This project meets this goal as a historic property that requires investment for expanded use and function.
 - <u>Create a quality and unique experience</u>. Ground floor transparency is framed by the historic brick façade and will grow with greater accessibility to the spaces.







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