

## Financial Reports

**City of Helena, MT  
Railroad TIF District  
Board Financial Report  
As of 6/30/22**

<b>Beginning Cash July 1, 2021</b>		<b>\$ 326,485</b>
Revenue:		
Real Property Taxes		304,221
Personal Property Taxes		16,882
Penalty & Interest		797
Interest		1,326
Total Revenue		<u>\$ 323,226</u>
Expenditures:		
Contracted Services		170,000
Capital Outlay		-
Total Expenditures		<u>\$ 170,000</u>
<b>Ending Cash - June 30, 2022</b>		<b>\$ 479,711</b>
Less		
10% Reserve for Affordable Housing*		\$ 50,333
Project Commitments		30,000
<b>Cash Available</b>		<u><u>\$ 399,379</u></u>

*\*Reslution 20630 passed 11/30/20*

**City of Helena, MT  
Railroad TIF District  
Board Financial Report  
As of 7/31/22**

<b>Beginning Cash July 1, 2022</b>		<b>\$ 479,711</b>
Revenue:		
Real Property Taxes		7,094
Personal Property Taxes		-
Penalty & Interest		-
Interest		-
Total Revenue		<u>\$ 7,094</u>
Expenditures:		
Contracted Services		-
Capital Outlay		-
Total Expenditures		<u>\$ -</u>
<b>Ending Cash - July 31, 2022</b>		<b>\$ 486,805</b>
Less		
10% Reserve for Affordable Housing*		\$ 69,185
Project Commitments		<u>30,000</u>
<b>Cash Available</b>		<b><u><u>\$ 387,621</u></u></b>

*\*Reslution 20630 passed 11/30/20*

**City of Helena, MT**  
**Railroad TIF District**  
**Board Financial Report**  
**Project Listing**  
**As of 7/31/22**

Project #	FY	Description	Budget	Actual	Balance	Notes
RD0900	2021	Ray Kuntz Sidewalks	50,568	50,568	-	Paid to Ray Kuntz Development, LLC in 2021
	2021	Sidewalks - ADA Improv.	100,000	100,000	-	Transferred to Fund 201 in FY21 - Project Carryover to FY22
		<b>Total - FY 2021</b>	<b>\$ 150,568</b>	<b>\$ 150,568</b>	<b>\$ -</b>	
TF1001	2022	Midway LLC ADA Improvements	25,000	25,000	-	Paid to Midway LLC in July 2021
TF2905	2022	Bell Hotel, LLC	175,000	145,000	30,000	Partial Pd 6/24/22 - Demolition costs
		<b>Total - FY 2022</b>	<b>\$ 350,568</b>	<b>\$ 320,568</b>	<b>\$ 30,000</b>	
		<b>Total - FY 2023</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

Application



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

**IMPORTANT: APPLICANTS MAY REQUEST UP TO FIFTY PERCENT MATCH (50%) FUNDING FOR PROJECTS THAT ALIGN WITH THE RAILROAD URBAN RENEWAL DISTRICT PLAN. COSTS TO BE PAID WITH RAILROAD 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.**

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

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

#### CHECKLIST ITEMS

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



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Project Name: 6th Ward Date Submitted: 8/15/2022

**APPLICANT INFORMATION**

Name (First & Last): Ray Kuntz Development LLC / Family Outreach  
 Address: PO Box 6784 / 1236 Helena Ave  
 City: Helena State: MT Zip Code: 59604 / 59601  
 Phone: (406)422-3785 / (406)443-3083 Cell: \_\_\_\_\_ Other: \_\_\_\_\_  
 Email: rayk138@hotmail.com / jmohler@familyoutreach.org

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

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

**PROJECT INFORMATION**

Building Address: Intersection of Helena Ave and N Roberts St  
 Legal Description: Northern Pacific Addition, S29, T10N, R03W

**PROPERTY OWNER INFORMATION**

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

Property Owner (First & Last): Ray Kuntz Development LLC / Family Outreach  
 Address: PO Box 6784 / 1236 Helena Ave  
 City: Helena State: MT Zip Code: 59604 / 59601  
 Phone: (406)422-3785 / (406)443-3083 Cell: \_\_\_\_\_ Other: \_\_\_\_\_  
 Email: rayk138@hotmail.com / jmohler@familyoutreach.org



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**PROJECT ARCHITECTURAL FIRM INFORMATION (WHERE APPLICABLE)**

Company/Firm: Triple Tree Engineering  
Point of Contact (First & Last): Brad Koon  
Address: 800 N. Last Chance Gulch, Ste 101  
City: Helena State: MT Zip Code: 59601  
Phone: (406)461-0692 Cell: \_\_\_\_\_ Other: \_\_\_\_\_  
Email: bkoon@tripletreemt.com

**PROJECT FINANCIAL LENDING INSTITUTION (WHERE APPLICABLE)**

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

**PROJECT CONTRACTOR INFORMATION (WHERE APPLICABLE)**

Company/Firm: Project will be bid.  
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.





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**TOTAL COST OF THE PROJECT**

Please summarize. A full breakdown of costs is required on the *Project Cost Worksheet*.  
Please reference the attached Preliminary Engineer's Estimate.

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**PROPERTY OWNERSHIP**

Do you own the property or are you currently purchasing it? Explain.  
The proposed work will be completed within City of Helena Right-of-Way.

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**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?  
Recent development has allowed for 40+ jobs in the area. This project will alleviate current parking deficiencies and allow for future growth in the 6th Ward Area.

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**PROJECT COMPLETION**

What is the expected completion date of the project?  
November 1, 2022

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**PROPERTY TAXES**

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

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**PROJECT COST & FINANCING SECTION**

Summarize the project costs on the Project Cost Worksheet. Use general categories and include items that are in the assistance request. The total cost should include land costs and “soft costs” such as zoning processes, surveys, and permits to enable the RURD 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. Kuntz - Engineering Survey, Design, and Permitting	\$ 22,212.60
2. Family Outreach - Engineering Survey, Design, and Permitting	\$ 17,797.80
Subtotal	\$ 40,010.40

Construction/Rehabilitation Costs

1. Kuntz	\$ 122,169.30
2. Family Outreach	\$ 97,887.90
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
Subtotal	\$ 220,057.20

Printing, Advertising, etc.

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

Other Miscellaneous Costs

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

**TOTAL PROJECT DEVELOPMENT COSTS**

Total \$ 260,067.60



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**PROJECT FINANCING WORKSHEET**

Owner/Developer Investment

50% of the total project cost as follows:  
 Ray Kuntz Development LLC \$72,190.95  
 Family Outreach \$57,842.85

Total applicant investment in the project

\$ \_\_\_\_\_

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

- 1. \_\_\_\_\_ \$ \_\_\_\_\_
- 2. \_\_\_\_\_ \$ \_\_\_\_\_
- 3. \_\_\_\_\_ \$ \_\_\_\_\_

Request for Eligible items

Total TIF Request

\$ 130,033.80

TOTAL PROJECT FINANCING \$ 260,067.60



## **Tax Increment Financing Application Form**

### Description of Project

There is currently a considerable parking deficiency in the 6<sup>th</sup> Ward area due to recent development. The proposed project will create approximately 26 additional parking spaces for current and future businesses. With the recent development in the area, pedestrian safety has become a concern. Proposed angle parking will narrow the travel lanes in Helena Avenue, helping to calm traffic. A designated cross walk is proposed at the intersection of Gallatin Avenue and Helena Avenue including a bulb out between the two streets to serve as a resting area. It is also proposed to convert Gallatin Street to a “one-way” street to facilitate traffic flow.

The City of Helena recently utilized matching TIF funds to improve pedestrian safety and parking on the east side of Roberts at the crossing of Gallatin and Helena Avenue. The City also plans to convert Gallatin Street between Sanders and Roberts Street to “one way” and develop angled parking on the north side of Helena Avenue adjacent to Beattie Park. The project proposed by Ray Kuntz Development, LLC and Family Outreach has been closely coordinated with the City of Helena to facilitate the City’s recent improvements east of Roberts Street and the master transportation plan for the area.

Following is a more detailed description of the proposed improvements:

#### **Helena Avenue:**

53 regular and 3 handicap 45° parking spaces are proposed on the east and west sides of Helena Avenue between N Montana Avenue and N Roberts Street. Extension of the sidewalk along the north side of Helena Avenue is proposed from its current termination to the intersection of Gallatin Avenue and Helena Avenue. A designated crosswalk with “bulb out” is proposed at the intersection of Helena Avenue and Gallatin Avenue to improve safety for pedestrian traffic. Addition of angled parking along Helena Avenue will likely adjust the location of the roadway centerline, and new centerline marking is therefore included as part of the project.

#### **Gallatin Avenue:**

Gallatin Avenue will be transformed into a “one way” roadway from the intersection of Gallatin Ave and Helena Ave to the Capital Transit building. The project will include 13 regular and 2 handicap 30° angled parking spaces on the North side of the street along with a new curb ramp.

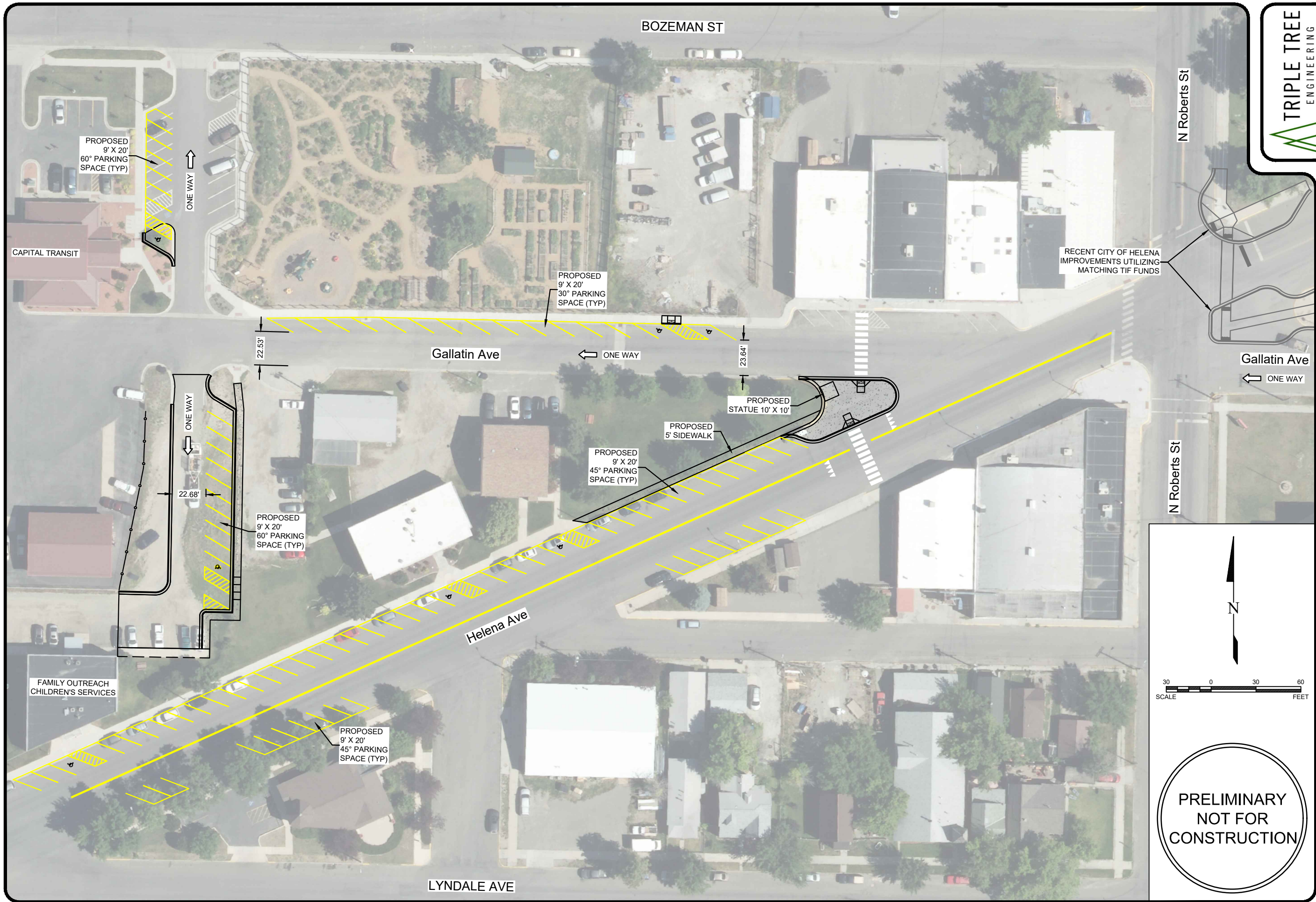


**Capital Transit Parking:**

Due to the designation of Gallatin Street as “one-way”, all traffic through the Capital Transit building parking lot will be travelling north. The angled parking on the west side of the parking lot will therefore be adjusted to accommodate the directional traffic, including 7 regular and 1 handicap 60° angled parking spaces.

**Family Outreach Area Parking:**

It is proposed to develop the existing gravel area south of the Capital Transit Building and south of Gallatin Avenue into a parking area. Due to the designation of Gallatin Street as “one-way”, all traffic through this parking lot will be travelling south. The proposed parking will therefore include directional angled parking including 10 regular and 1 handicap 60° angled parking spaces, a sidewalk running North and South along its Eastern edge, and encompassing curb and gutter.

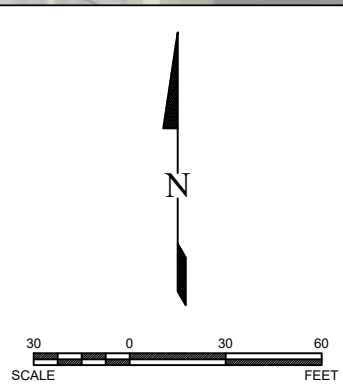


REVISIONS	DATE	DESCRIPTION

**6TH WARD**  
 RAY KUNTZ  
 HELENA, MT

**PROPOSED / RECENT IMPROVEMENTS**

PROJECT #	21-72
DRAFTED BY:	MAW
CHECKED BY:	BJK
DATE:	10/25/2021
SHEET	1



**PRELIMINARY  
 NOT FOR  
 CONSTRUCTION**

Aug 05, 2022 - 2:32pm - P:\Helena\21-72 Ray Kuntz 6th Ward\Design\CADD\Exhibits\21-72\_Preliminary\layout.dwg

**6th Ward  
City of Helena  
Preliminary Engineer's Estimate  
Helena, Montana**



Item	Quantity Kuntz	Quantity Family Outreach	Total Quantity	Unit	Unit Cost	Cost Kuntz	Cost Family Outreach	Total Project Cost
MOBILIZATION	0.5	0.5	1	LS	\$ 15,000.00	\$ 7,500.00	\$ 7,500.00	\$ 15,000.00
CONSTRUCTION TRAFFIC CONTROL	0.5	0.5	1	LS	\$ 10,000.00	\$ 5,000.00	\$ 5,000.00	\$ 10,000.00
REMOVAL - CURB & GUTTER	112	20	132	LF	\$ 4.00	\$ 448.00	\$ 80.00	\$ 528.00
REMOVAL - ASPHALT	1,797	452	2,249	SQFT	\$ 5.00	\$ 8,985.00	\$ 2,260.00	\$ 11,245.00
EXCAVATION/PLACEMENT	50	50	100	CUYD	\$ 50.00	\$ 2,500.00	\$ 2,500.00	\$ 5,000.00
CURB & GUTTER	204	366	570	LF	\$ 40.00	\$ 8,160.00	\$ 14,640.00	\$ 22,800.00
SIDEWALK 4"	932	988	1,920	SQFT	\$ 12.00	\$ 11,184.00	\$ 11,856.00	\$ 23,040.00
CONCRETE ISLAND 6"	1,604		1,604	SQFT	\$ 16.00	\$ 25,664.00	\$ -	\$ 25,664.00
ASPHALT 3"	297	7,713	8,010	SQFT	\$ 4.00	\$ 1,188.00	\$ 30,852.00	\$ 32,040.00
CRUSHED BASE COURSE	62	222	284	CUYD	\$ 50.00	\$ 3,100.00	\$ 11,100.00	\$ 14,200.00
PAVEMENT MARKING - YELLOW 4"	3,050	200	3,250	LF	\$ 8.00	\$ 24,400.00	\$ 1,600.00	\$ 26,000.00
PAVEMENT MARKING - ACCESS AISLE 4"	588	172	760	LF	\$ 8.00	\$ 4,704.00	\$ 1,376.00	\$ 6,080.00
PAVEMENT MARKING - WHITE 24"	160		160	LF	\$ 8.00	\$ 1,280.00	\$ -	\$ 1,280.00
PAVEMENT MARKING - SYMBOLS	9	1.5	11	SQFT	\$ 150.00	\$ 1,350.00	\$ 225.00	\$ 1,575.00
PAVEMENT MARKING - YIELD LINE	24		24	SQFT	\$ 150.00	\$ 3,600.00	\$ -	\$ 3,600.00
CURB PAINT	1		1	LS	\$ 2,000.00	\$ 2,000.00	\$ -	\$ 2,000.00
Estimated Construction Cost						\$ 111,063.00	\$ 88,989.00	\$ 200,052.00
Contingency	10			%		\$ 11,106.30	\$ 8,898.90	\$ 20,005.20
Total Construction Cost						\$ 122,169.30	\$ 97,887.90	\$ 220,057.20
Engineering Survey, Design, and Permitting	20			%		\$ 22,212.60	\$ 17,797.80	\$ 40,010.40
<b>Total Cost</b>						<b>\$ 144,381.90</b>	<b>\$ 115,685.70</b>	<b>\$ 260,067.60</b>

# Workplan





## **RAILROAD URBAN RENEWAL DISTRICT WORK PLAN, AUGUST 2022**

### **Funding Accruals**

Approximately \$300,000 is currently available for projects in the Railroad Urban Renewal TIF District as of August 2022.

### **Prioritized Projects**

The Railroad Urban Renewal District TIF Advisory Board recommends that applicants may request up to fifty percent match (50%) funding for all projects. The board further recommends the following development program prioritizations for FY2023, and seeks to solicit applications based on these priorities:

- RURD Housing Program → Grant awards may be made for projects that create or retain affordable housing opportunities in the district.
- Infrastructure Improvement Program → Grants awards may be made for projects that identify and prioritize upgrades to water, sewer, stormwater drainage infrastructure, and vehicular, parking, and pedestrian/bike transportation improvements.
- Transportation Planning Study Program → Grant awards may be made for transportation planning studies within the Railroad Urban Renewal District to address vehicular and pedestrian/bike transportation planning needs.
- Historic Façade & Site Improvement Program → Grant awards may be made for projects that restore/rehabilitate historic buildings and other historic site features such as brick paving, fencing, and lighting.
- Marketing/Branding Project Program → Grant awards may be made to establish a marketing and/or branding plan and an implementation strategy for the Railroad Urban Renewal District.
- RURD Planning Study Program → Grant awards may be made planning efforts that identify regulatory roadblocks to redevelopment and promote sound urban design through zoning reform for the Railroad Urban Renewal District.



## **Additionally Recognized Eligible Project Priorities**

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