



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

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

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

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

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

CHECKLIST ITEMS

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



APPLICATION PRIORITY AREAS FOR TIF ASSISTANCE

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

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



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APPLICATION PRIORITY AREAS FOR TIF ASSISTANCE

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

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



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Project Name: _____ Date Submitted: _____

APPLICANT INFORMATION

Name (First & Last): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Cell: _____ Other: _____

Email: _____

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

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

PROJECT INFORMATION

Building Address: _____

Legal Description: _____

PROPERTY OWNER INFORMATION

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

Property Owner (First & Last): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Cell: _____ Other: _____

Email: _____



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PROJECT ARCHITECTURAL FIRM INFORMATION (WHERE APPLICABLE)

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

PROJECT FINANCIAL LENDING INSTITUTION (WHERE APPLICABLE)

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

PROJECT CONTRACTOR INFORMATION (WHERE APPLICABLE)

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

DESCRIPTION OF PROJECT

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

PROJECT RENDERINGS (IF APPLICABLE)

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



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TOTAL COST OF THE PROJECT

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

PROPERTY OWNERSHIP

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

JOB CREATION

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

PROJECT COMPLETION

What is the expected completion date of the project?

PROPERTY TAXES

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



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PROJECT COST & FINANCING SECTION

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

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

PROJECT COST WORKSHEET

Professional Services

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

Construction/Rehabilitation Costs

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

Printing, Advertising, etc.

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

Other Miscellaneous Costs

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

TOTAL PROJECT DEVELOPMENT COSTS

Total \$ _____



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PROJECT FINANCING WORKSHEET

Owner/Developer Investment

Total applicant investment in the project \$ _____

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

1. _____ \$ _____

2. _____ \$ _____

3. _____ \$ _____

Request for Eligible items

Total TIF Request \$ _____

TOTAL PROJECT FINANCING \$ _____



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PROJECT NARRATIVES SECTION:

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



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PROJECT NARRATIVES SECTION (CONTINUED):

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

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

ATTACHMENT A: ELIGIBLE ACTIVITIES

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

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

ATTACHMENT B: GOALS OF THE DOWNTOWN URD

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

ATTACHMENT B: GOALS OF THE DOWNTOWN URD (CONTINUED)

- **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)**
 - 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 onto a fun and funky interactive way
 - Monitor parking demand and identify potential for temporary uses or longer term uses