



CITY OF HELENA, MONTANA Parks and Recreation Master Plan

**PHASE 2- MASTER PLAN
DECEMBER 2018**



ACKNOWLEDGMENTS

The City of Helena and Lewis and Clark County would like to acknowledge the contributions of all residents and civic and citizen groups that participated in the process of creating this plan.

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EXECUTIVE SUMMARY

A. PURPOSE OF THIS MASTER PLAN

The purpose of updating each Comprehensive Plan is to create a clear set of goals and objectives that will allow coordination with the City-County Parks Board, city and county staff, and commissions for on-going management/maintenance, re-development, growth, and enhancement of the existing parks and future acquisition and development of new parkland in both the city and county.

B. BACKGROUND AND STRATEGIC FRAMEWORK

Under the coordination and partnership of a joint City-County Parks Board, the City of Helena, and Lewis & Clark County, this process updates the individual jurisdictional comprehensive parks plans simultaneously by combining planning processes and services. The parallel planning effort resulted in two separate updated parks plans; however, the plans identify shared issues, needs, and opportunities for future collaboration between the two jurisdictions.



C. METHODOLOGY OF MASTER PLAN

The process for completing this Master Plan happened in two phases. Phase 1 began in March of 2018 and concluded the following September. The development process included an integrated project team consisting of staff representing various areas. The planning process allowed for a collaborative approach incorporating consultant expertise, as well as local knowledge and institutional history that only staff and community engagement can provide. The development of this report included the following tasks:

Phase 1

Information Gathering

Relevant information from previous planning documents and from budgets, work plans, and funding plans utilized by the Department was reviewed in order to facilitate the direction and recommendations.

Community Workshops and Outreach

Multiple outreach methods were employed to engage stakeholders from throughout the area. Participants included individual users and non-users, user groups, special interest organizations, associations, and other stakeholders.

Demographics Analysis

Demographic analysis and market profile defined the community character of the City of Helena, Lewis & Clark County, and part of North Jefferson County, and utilizing information available from previous planning efforts.

Trends Analysis

To help form short-term recommendations and set the stage for long-term goals, the project team researched and identified potential trends that may influence the use of indoor and outdoor recreation facilities and programs.

Phase 1 and 2

Inventory and Analysis of Parks, Facilities, and Programs

Inventory of Assets and Opportunities

The project team compiled available GIS/CAD materials to develop a comprehensive assessment of the area's recreation facilities and programs.

Facility and Asset Gaps and Level of Service Analysis

In combination with the findings from the focus groups, stakeholder meetings, demographics and trends, and current level of service and standards, the project team identified and prioritized the unmet needs and potential opportunities in the community.

Other Analysis – Market/ Service – Gaps, Collaborations, and Saturations

Using the results of the focus groups, stakeholder meetings, SWOT Analysis, demographics, and trends, the current level of service and standards, the project team identified the unmet needs and potential opportunities in the community.

Partners and Alternative Providers – A Collaborative Approach

Throughout the process, the project team engaged several potential partners and collaborators within the service area. Through collaboration, individual departments can deliver a satisfying level of service to a community without needing to provide for every unmet need.

Operational Analysis – Projecting Fiscal Resources, Cost Recovery and Allocation

An overview analysis of existing funding was conducted to ensure that existing needs and projected funding meet future needs. Other sources of funding were also analyzed and identified.

Marketing Analysis

The project team conducted a market analysis to identify the appropriate mix of communications tools to promote agency programs, facilities, events, and services and to provide accurate, timely, and useful information to the various segments of the target audience.

Phase 2

Visioning Strategies and Recommendations
There was a Visioning Strategies Workshop conducted with both City and County

constituents, which included a discussion of all findings, and any other potential challenges. The workshop identified opportunities for implementation steps, work plans, and funding implications.

Project Schedule and Timeline

The following 2018 timeline of tasks was determined following a strategic kick-off meeting.

Project Coordination, SKO and CSF/Vision	March – August
Project Coordination	
Community and Stakeholder Input, Information Gathering	April – June
Review Existing Plans and Conditions	April
Staff and Stakeholder Engagement	April – May
Statistically Valid Survey	April – June
Inventory and Level of Service Analysis	April – October
Inventory of Assets and Opportunities	April – October
Facility, Service, and Asset Gaps	April – October
SWOT Analysis	April – May
Demographics an Trends Analysis	April – May
Operational Analysis	April – October
Market Analysis – Gaps, Collaborations, and Saturations	May – October
Partners and Alternative Providers	May – October
Findings, Visioning, and Recommendations	July – September
Finding Compilation and Validation	July – September
Visioning Workshop	October
Final Recommendations and Action Plan	November – December
Final Draft Plan and Recommendations	November
Plan Approval	December

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I. PURPOSE AND BACKGROUND INFORMATION

A. PURPOSE OF THIS MASTER PLAN

The primary purpose of updating each Comprehensive Plan is to create a clear set of goals and objectives that will provide direction to the City-County Parks Board, city and county staff and commissions for on-going management/ maintenance, re-development, growth, and enhancement of the existing parks and future acquisition and development of new parkland in both the city and county.

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Under the direction and partnership of a joint City-County Parks Board, the City of Helena and Lewis & Clark County, this process updates the individual jurisdictional comprehensive parks plans simultaneously by combining planning processes and services. The parallel planning effort resulted in two separate updated parks plans; however, the plans identifies shared issues, needs, and opportunities for future collaboration between the two jurisdictions.

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project team consisting of staff representing various areas. The planning process allowed for a collaborative approach that incorporates consultant expertise, as well as local knowledge and institutional history that only staff and community engagement can provide. The development of this report included the following tasks.

Phase 1 – Information Gathering

Relevant information from previous planning documents and from budgets, work plans, and funding plans utilized by the Department were reviewed in order to facilitate the direction and recommendations. Information collected and reviewed included:

- The City of Helena Parks, Recreation, and Open Space Plan
- The City Growth Policy
- The 2004 Lewis and Clark County Growth Policy
- 2015 Lewis and Clark County Growth Policy Update- Helena Valley Area Plan
- Lewis and Clark County Parks and Recreation Plan
- Greater Helena Area Transportation Plan
- Lewis and Clark County Open Lands Program
- Lewis and Clark County Subdivision Regulations
- Existing inventory, including site visits
- Budgets, work plans, and funding plans utilized by the Departments to facilitate the comprehensive coordination of direction and recommendations

Phase 1 – Community Workshops and Outreach

Multiple outreach methods were employed to engage stakeholders from throughout the area. Participants included individual users and non-users, user groups, special interest organizations, associations, and other stakeholders. Utilizing a mixed-methods approach, the project team engaged participants through:

- Stakeholder Interviews
- Focus Group Meetings
- Public Meetings
- Statistically-Valid Survey
- Findings Presentation

These meetings were held in a modified Strength, Weakness, Opportunity, and Threat (SWOT) Analysis format. Initial community outreach results were used to guide discussions regarding short and long-term goals for the future planning

of facilities and the provision of programs and services.

Phase 1 – Demographics Analysis

Demographic analysis and market profile defined the community character of the City of Helena, Lewis & Clark County, and part of North Jefferson County, and utilizing information available from previous planning efforts. The demographic analysis based on service areas was used to outline trends and information that could affect the need for facilities and programming. Factors that were analyzed included:

- Population density
- Age Distribution
- Households
- Gender
- Ethnicity
- Household Income

Phase 1 – Trends Analysis

To help form short-term recommendations and set the stage for long-term goals the project team researched and identified potential trends that may influence the use of indoor and outdoor recreation facilities and programs. The trends analysis includes an evaluation of demographic shifts and their impact on what needs to be provided for the future, interest and participation levels for a variety of activities, and new developments in the field.

Phase 1 and 2 – Inventory and Analysis of Parks, Facilities, and Programs

Inventory of Assets and Opportunities

The project team compiled available GIS/CAD materials to develop a comprehensive assessment of the area's recreation facilities and programs. Additionally, relevant community park and recreation assets owned and managed by other entities were identified with the goal of informing a tailored level of service standard for the recreational services in the area.

Facility and Asset Gaps and Level of Service Analysis

In combination with the findings from the focus groups, stakeholder meetings, demographics and trends, and current level of service and standards, the project team identified and prioritized the unmet needs and potential opportunities in the community.

Other Analysis – Market/ Service – Gaps, Collaborations, and Saturations

Using the results of the focus groups, stakeholder meetings, SWOT Analysis, demographics, and trends, the current level of service and standards, the project team identified the unmet needs and potential opportunities in the community. These gaps in service can further be identified and later substantiated using the nexus of unmet need and high importance, determined through previous surveys and the community engagement process.

Partners and Alternative Providers – A Collaborative Approach

Throughout the process, the project team engaged several potential partners and collaborators within the service area. Through collaboration, individual departments can deliver a satisfying level of service to a community without needing to provide for every unmet need. This service strategy leverages partnerships with other providers to extend service opportunities for communities.

Operational Analysis – Projecting Fiscal Resources, Cost Recovery and Allocation

An overview analysis of existing funding was conducted to ensure that existing needs and projected funding meet future needs. Other sources of funds were also analyzed and identified.

The City currently utilizes a cost recovery methodology. The an overall philosophy and approach for resource allocation, program pricing, and cost recovery evaluation was evaluated, including a review of an existing policy for identification of gaps.

Marketing Analysis

The project team conducted a market analysis to identify the appropriate mix of communications tools to promote agency programs, facilities, events and services and to provide accurate, timely, and useful information to the various segments of the target audience.

Phase 2 – Visioning Strategies and Recommendations

A Visioning Strategies Workshop was conducted with both City and County constituents, which included a discussion of all findings, and any other potential challenges. The workshop identified opportunities for implementation steps, work plans, and funding implications.



Project Schedule and Timeline

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II. COMMUNITY PROFILE AND IDENTIFICATION OF NEEDS

A. DEMOGRAPHIC PROFILE

By analyzing population data, trends emerge that can inform decision-making and resource allocation strategies for the provision of parks, recreation, and open space management. Key community characteristics were analyzed to identify current demographic statistics and trends that can impact the planning and provision of services. The following section contains the most relevant demographics to create a community profile. A full demographics Report can be found in **Appendix A**.

CITY OF HELENA 2018 DATA

POPULATION: 30,147

ANNUAL GROWTH RATE: 0.8%

HOUSEHOLDS IN POVERTY: 14.1%

MED. HOUSEHOLD INCOME: \$54,611

MEDIAN AGE: 42

LEWIS & CLARK COUNTY 2018 DATA

POPULATION: 68,910

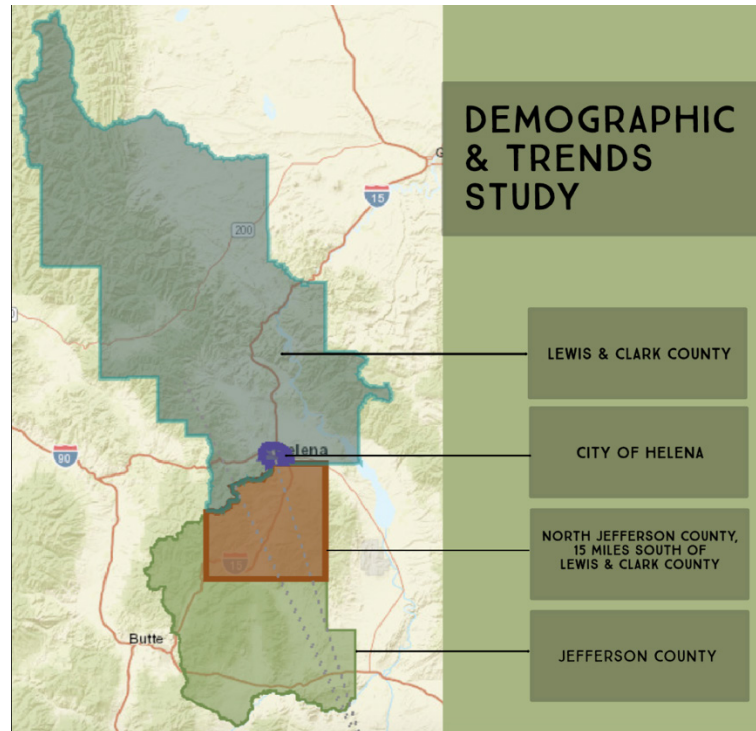
ANNUAL GROWTH RATE: 1.04%

HOUSEHOLDS IN POVERTY: 11.28%

MED. HOUSEHOLD INCOME: \$58,898

MEDIAN AGE: 42.5

Figure 1: Demographic Map and Overview of Study Areas



City of Helena
Area: 16.39 mi²



Lewis and Clark
County
Area: 3,498 mi²

Source: Esri Business Analyst; Image: Google Maps, June 2018

Population Projections

Figure 2 contains actual population figures based on the 2000 and 2010 U.S. Census, in addition to estimates of 2018 and 2022 population by ESRI Business Analyst. Using the average annual growth rates between 2018 and 2023, projections were calculated for 5 and 10 year increments until 2028.

Lewis and Clark County is expected experience over one percent average annual growth from 2018 to 2023; projections estimate that the population will reach over 70,000 in the next five years. The City of Helena will also grow, slightly more slowly, to just over 31,000 in 2023.

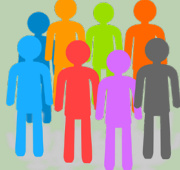
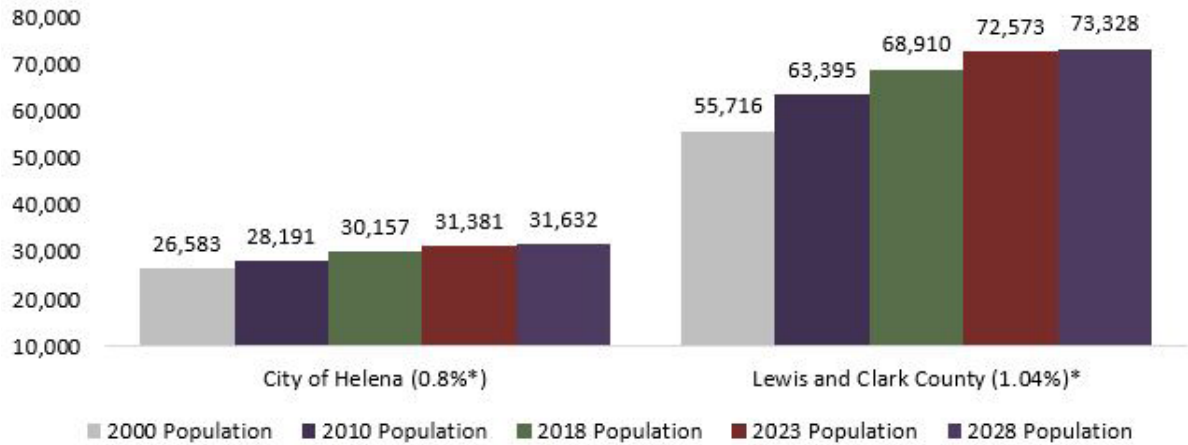


Figure 2: City and County Population Growth Trend



Source: U.S. Census Bureau and Esri Business Analyst Population Projections
 *2018 – 2028 growth rate

Population Age & Gender Distribution

The City of Helena has roughly 1,000 more females (51.8%) than men (48.1%), while Lewis and Clark County is nearly balanced at 49.3% and 50.6%. The existing and projected population of different age groups, or cohorts, is illustrated in the following series of figures. As demonstrated in **Figure 3**, the city and county have very different age distributions. Knowing this can help inform in planning recreational activities for specific age groups.



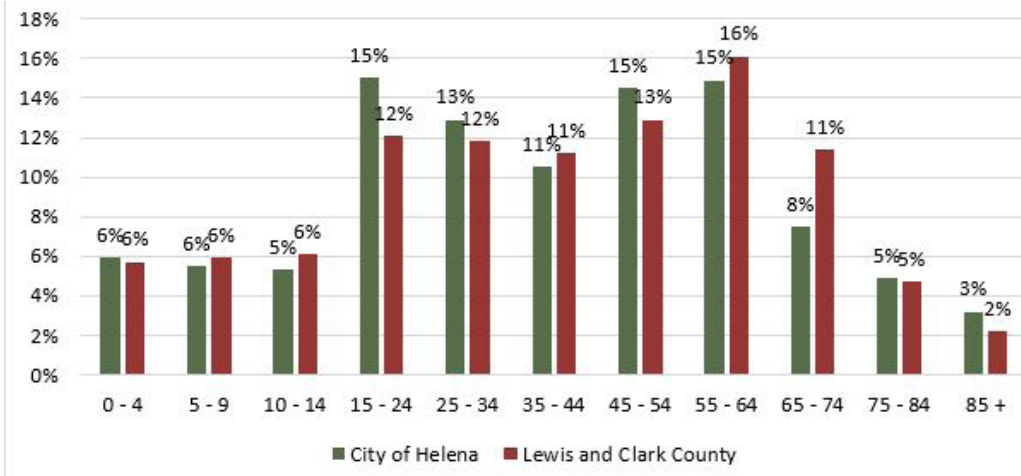
The median age between the two areas is very similar; 42.5 years is the median age in Lewis and Clark County, and it is 42 years in the City of Helena. The major differences between the City of Helena and Lewis and Clark County is the distribution between ages 15 and 54. The City of Helena has the majority of its residents in this category (69%). Lewis and Clark County has 21.5 percent of persons under 18 years old, and over 16 percent just in the 55 to 64 age cohort.

Percent of
Persons
Under 18
Years Old

City of Helena
17.9%

Lewis and Clark County
21.5%

Figure 3: 2018 Estimated Population by Age Cohort



Source: Esri Business Analyst

Household Information

Data regarding the households, housing value, and median income was measured using ESRI Business Analyst and American Community Survey. **Table 1** breaks down the data by occupied housing units, the number of housing units, and the number of households.

Table 1: 2018 City and County Housing Profile

	City of Helena	Lewis and Clark County
Total Housing Units	14,423	32,925
Number of Households	13,655	28,990
Average Household Size	2.09	2.31
Owner Occupied Housing Units	48.0%	57.3%
Renter Occupied Housing Units	46.7%	30.8%
Vacant Housing Units	5.3%	12.0%

Source: Esri Business Analyst

Median Household Income

The most current data from the U.S. Census Bureau and the American Community Survey, illustrated in **Figure 4**, indicates that the median household income in the City and County was higher than that of the Montana, and about average with the median household income of the United States.

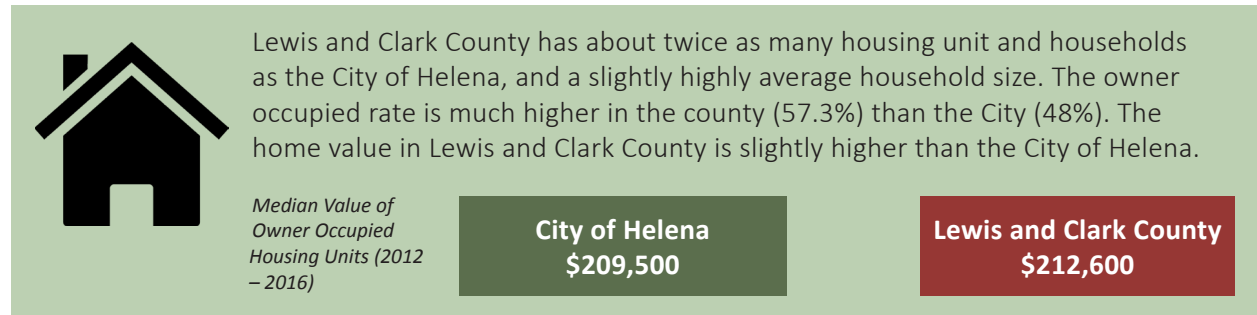
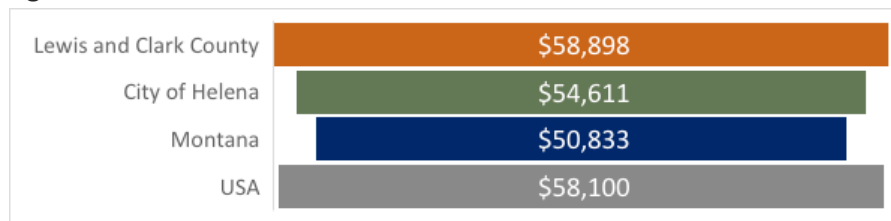


Figure 4: Median Household Income



Source: Esri Business Analyst

A Look at North Jefferson County

A final comparison report was requested for Northern Jefferson County. Basic demographic information is demonstrated below in **Table 2**. Using the boundary of Lewis and Clark County, and measuring 15 miles south, this portion of Northern Jefferson County was a total 545.41 Square Miles.

Table 2: Demographic Comparison

Variable	Lewis and Clark County	Northern Jefferson County	Helena City
2018 Total Population	68,910	7,942	30,157
2018-2023 Population: Annual Growth Rate	1.04%	0.70%	0.80%
2018 Median Household Income	\$58,898	\$83,085	\$54,611
2018 Median Home Value	\$227,852	\$292,241	\$222,563
2018 Total Housing Units	32,925	3,283	14,423
2018 Owner Occupied Housing Units	18,854	2,585	6,917
2018 Renter Occupied Housing Units	10,136	440	6,738
2018 Vacant Housing Units	3,935	257	768
2018 Median Age	42.5	47.5	42.0

B. NATIONAL TRENDS IN PARKS AND RECREATION SERVICES

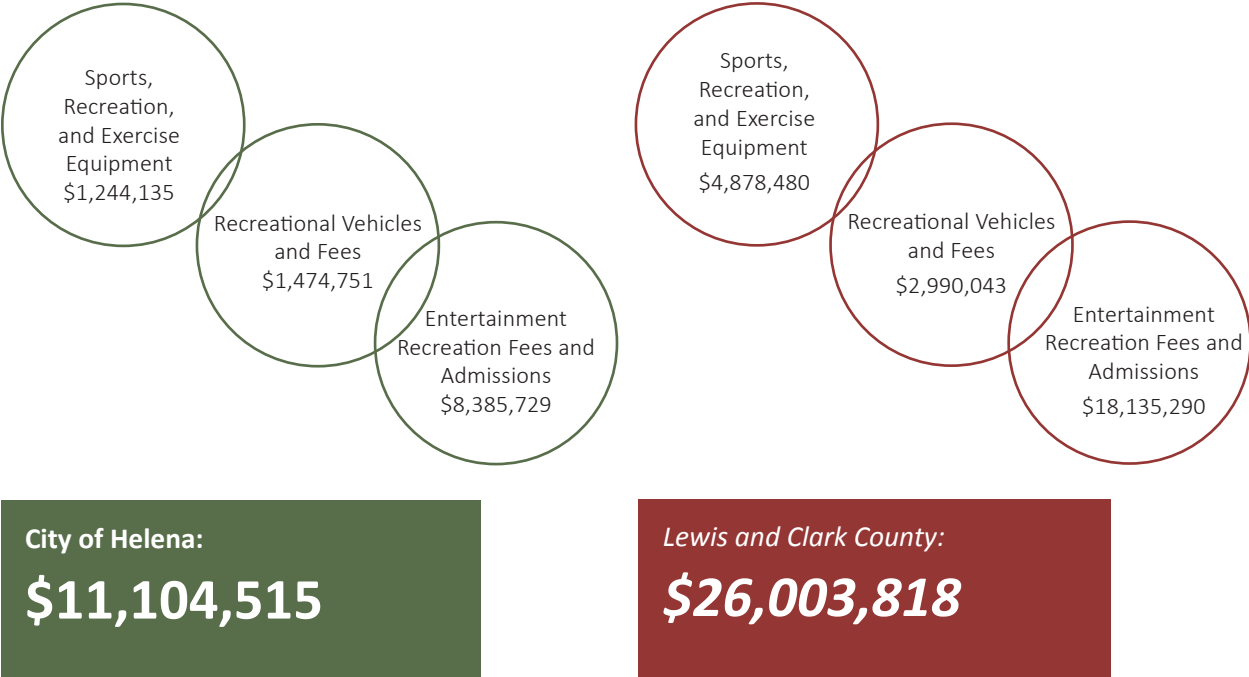
The pace of change today requires analyzing recreation trends from both a local and national level. Understanding the participation levels of the city and county residents using data from the U.S. Census Bureau, combined with research of relevant national recreation trends, provides critical insights that help to plan for the future.

Learning from these new shifts in participation in outdoor recreation, sports, and cultural programs, is an essential component of understanding and serving the community.

Local and State-wide Recreational Expenditures

According to the U.S. Census Bureau, City of Helena residents spent \$867.95 a year on recreational expenditures, while residents in Lewis and Clark County spent an average of \$896.99 a year. This included membership fees for social, recreation, and community clubs, fees for recreation lessons, camping fees, recreation equipment purchases, and other related recreation expenses. Total expenditures in for the County and City are shown in **Figure 5**.

Figure 5: Expenditures for the City of Helena and Lewis and Clark County



Source: Esri Business Analyst

According to the Outdoor Industry Economy Report (**Figure 6**), in Montana alone, annual consumer spending in outdoor recreation is \$7.1 billion, supporting 71,000 direct jobs. This led to \$286 Million in state and local tax revenue.

Figure 6: State of Montana Outdoor Recreation Economy



Source: Outdoor Industry, 2016 Outdoor Recreation Economy Report

Generational Changes

Activity Participation varies based on age, but it also varies based on generational preferences. (Age ranges for each generation are found in **Table 3**.) With regard to generational activity, according to the 2018 “Sports, Fitness, and Leisure Activities Topline Participation Report” (**Figure 7**), Millennials had the highest percentage of those who were “active to a healthy level,” but a quarter also remained sedentary. Nearly 28 percent of Generation X were inactive, with Baby Boomers at 33 percent inactive. Baby Boomers prefer low impact fitness activities such as swimming, cycling, aquatic exercise, and walking for fitness.

Table 3: Generational Age Categories

Generational Group	Age Category
Generation Alpha	~ Born 2010 - ?
Generation Z	~ Born 1997 - 2010
Millennials	Born 1981 - 1996
Generation X	Born 1965 - 1980
Baby Boomers	Born 1946 - 1964
Silent Generation	Born 1928 - 1945

Source: Pew Research Center, 2018

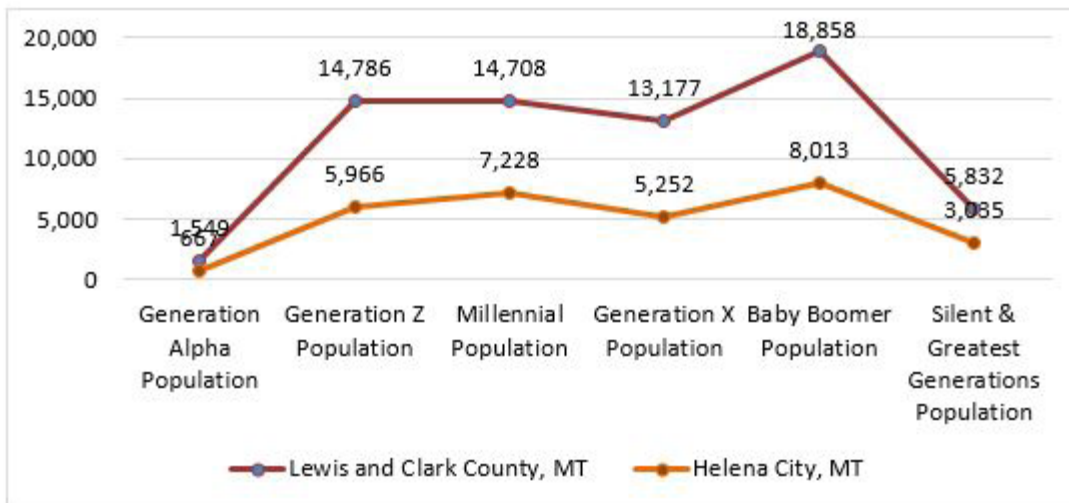
Figure 7: Generational Characteristics

BABY BOOMERS	GENERATION X	MILLENNIALS	GENERATION Z
<ul style="list-style-type: none"> • Least Active Generation • Top 3 activity preferences: <ul style="list-style-type: none"> ▪ Fitness Sports ▪ Outdoor Sports ▪ Individual Sports 	<ul style="list-style-type: none"> • Varied Activity Levels • Top 3 activity preferences: <ul style="list-style-type: none"> ▪ Fitness Sports ▪ Outdoor Sports ▪ Individual Sports 	<ul style="list-style-type: none"> • Moderately Active • Top 3 activity preferences: <ul style="list-style-type: none"> ▪ Fitness Sports ▪ Outdoor Sports ▪ Individual Sports 	<ul style="list-style-type: none"> • Most Active Generation • Top 3 activity preferences: <ul style="list-style-type: none"> ▪ Outdoor Sports ▪ Team Sports ▪ Fitness Sports

Source: SFIA 2018 Topline Report

Figure 8 below demonstrates the breakdown of generations in the City and County. Both locations had similar generational makeup. Baby Boomers make up the largest generational group, followed by Generation Z and Millennials.

Figure 8: County and City Generational Comparisons



Racial and Ethnic Trends

The United States is becoming increasingly racially and ethnically diverse. People who identify as Hispanic, Latino, or Spanish may be any race and are included in all of the race categories. The U.S. Census Bureau notes that Hispanic origin can be viewed as the heritage, nationality, lineage, or country of birth of the person, or the person’s parents or ancestors before arrival in the United States.

In 2010, just over 16 percent of adults identified as being of Hispanic origin; this number is expected to reach almost 20 percent in 2023.

Table 4 shows a comparison between County, City, and National percentages.

Table 4: Hispanic Population Change Over Time

Variable	Lewis & Clark County	City of Helena	Montana	USA
2010 Hispanic Population (%)	2.50%	2.76%	2.89%	16.35%
2018 Hispanic Population (%)	3.42%	3.71%	3.93%	18.32%
2023 Hispanic Population (%)	4.20%	4.54%	4.65%	19.82%

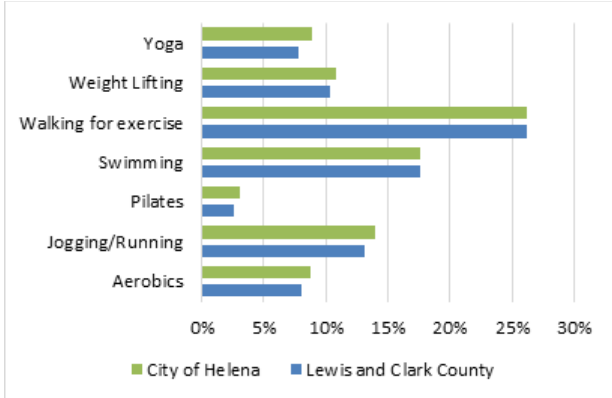
Source: Pew Research Center, 2018

Recreational Preferences

According to the 2018 “Sports, Fitness, and Leisure Activities Topline Participation Report,” outdoor recreation is an activity group that is continuing to capture the interest and attention of new audiences. With the exception of those older than 55, all other age groups listed camping as the number one activity among non-participants.

Nationally, overnight backpacking has seen an average annual growth of seven percent for the last five years. RV Camping is also growing in popularity, with an average annual growth of nine percent in the last three years. Stand up paddle boarding has seen, on average, 20 percent annual growth in the last five years.

Figure 9: Fitness and Health Participation in the City and the County



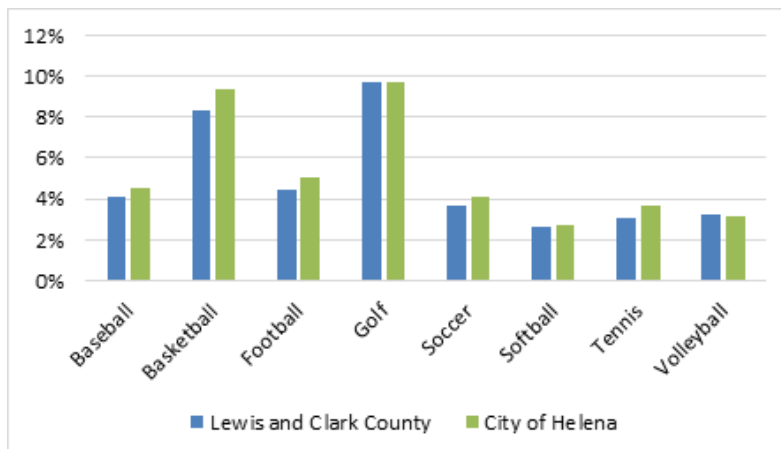
Source: ESRI Business Analyst, U.S. Census



According to the 2018 SFIA, Millennials are more likely than other generations to engage in water sports. The most popular fitness activity in both the city and county was walking for exercise in 2018, followed by swimming, jogging/running, and weight lifting. Yoga is also a popular activity in the area, with almost nine percent participation in the City of Helena (**Figure 9**).

With regard to participation in sports (**Figure 10**), golf and basketball were two of the most popular sports in both locations, with almost 10 percent of household participation in the sports. Baseball and football were also popular sports.

Figure 10: Team Sports Participation in the City and the County



Source: ESRI Business Analyst, U.S. Census

C. INVENTORY AND DATA COLLECTION

Inventory

The project team conducted an inventory of parks and facilities from April to June of 2018. During this process, the team paired a compilation of City and County spatial data with information collected from local governments and alternate providers. The inventory is intended to represent the parks and recreation infrastructure within the Department’s service profile and is being utilized to help determine the equity of access and service provision throughout the service area. Having a deep understanding of the physical layout of the system will also strengthen the Department’s ability to prioritize projects, focus on partnership opportunities, and better allocate public resources. Representative park sites were visited firsthand by the project team in April 2018.

Current Conditions

Multiple entities provided the full-service profile of the area. On a larger national or regional scale (**Figure 11**), providers include the Bureau of Land Management and the United States Forest Service, and on a smaller, local scale the City and County (**Figure 12**). Compiled data from

each organization begins to answer how much recreational opportunity exists to users within the area (regardless of who is providing the service or opportunity). Full maps and graphics can be found in **Appendix C**. Additional information can be found in the current parks and recreation master plan and the Board report regarding the formation of a district in the area.

Figure 11: National/Regional Recreational Activities

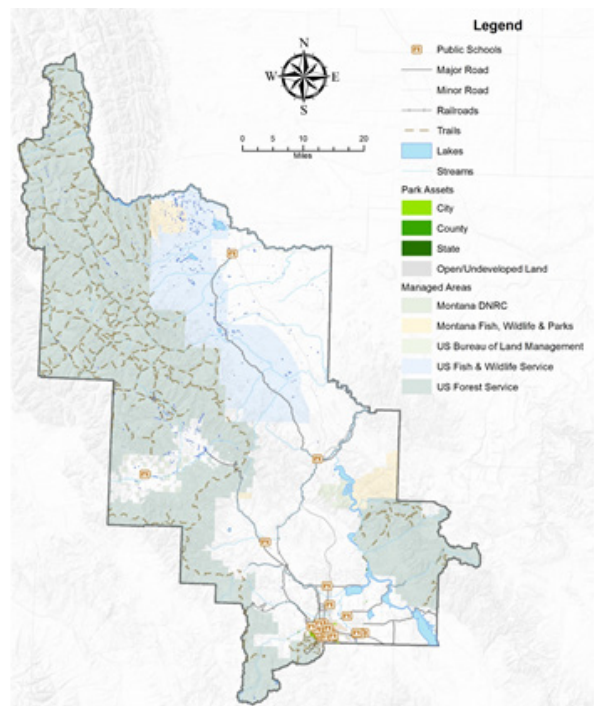
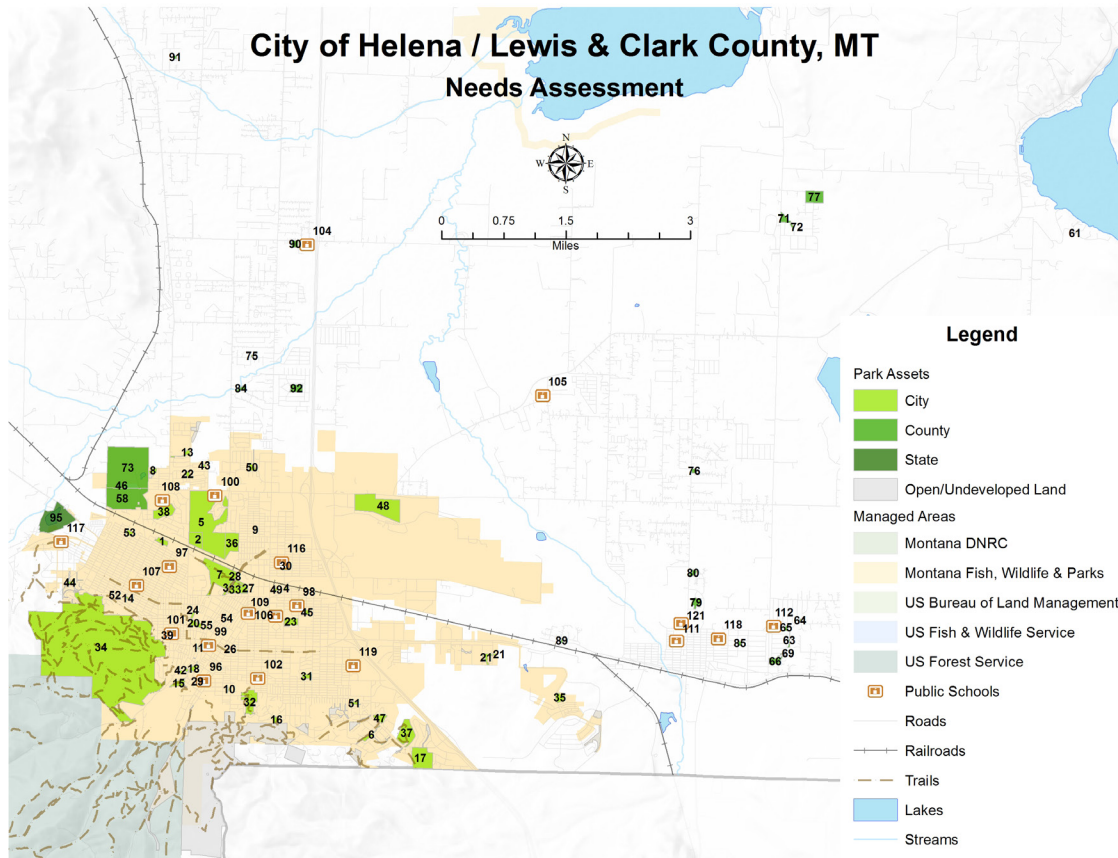


Figure 12: Local Recreation Opportunities



Inventory Within the System

To take an additional step in the inventory process, the project team looked at the physical layout of the recreational components within the park system. This process included identifying the following in each park:

- Name
- Ownership
- Park Category (or Type)
- Acreage
- Amenities

Table 5 is a sample of the inventory spreadsheet created. A full report can be found in **Appendix C**.

Table 5: Sample Inventory Table

PARK NAME	CITY-COUNTY	Category	Summary	ACRES	Amenities
Robinson Park	City	Neighborhood	Simple park with a lot of unprogrammed turf	2.6	Picnic Tables, Picnic Shelter, Playfield
Beattie Park	City	Memorial - Historic	Open space associated with old train station, Industrial area adjacency	0.6	Historic Point of Interest, Monuments, Picnic Tables, Picnic Shelter
Lincoln Park	City	Neighborhood - School	Open space adjacent to school. Several different program areas	4.5	Baseball, Basketball, Horseshoe Pit, Ice Rink, Off Street Parking, Playfield, Picnic Tables, Picnic Shelter, Playground, Restrooms, Softball, Youth
Cherry Hill Park	City	Neighborhood	Smaller neighborhood park with basketball and older playground	0.7	Baseball, Bike/Ped Trails
Skelton Park	City	Neighborhood	Newer neighborhood park with newer playground and large unprogrammed (sloping) lawn	3.2	Basketball, Drinking Fountains, Picnic Tables, Picnic Shelter, Playground
Pioneer Village Park	City	Neighborhood	Smaller neighborhood park with little program and younger trees	0.5	Playfield
Crystal Springs Park	City	Undeveloped	Undeveloped park with a stream and wetland adjacent to residential area	3.4	Natural
Jaycee Park	City	Neighborhood	Newer neighborhood park with newer playground and large unprogrammed (sloping) lawn	1.7	Playfield
Batch Park	City	Sports	Destination active recreation (4 softball field) park	17.5	Concessions, Drinking Fountains, Off Street Parking, Picnic Tables, Picnic Shelter, Playground, Restrooms, Softball
Barney Park	City	Neighborhood - Sports	Larger neighborhood park with several different active rec program areas	5.4	Basketball, Drinking Fountains, Ice Rink, Off Street Parking, Playfield, Picnic Tables, Picnic Shelter, Playground, Restrooms, Softball, Tennis Courts, Youth Baseball

D. COMMUNITY AND STAKEHOLDER INPUT

Public input was gathered during April of 2018. Methods used to engage with the community included focus group, stakeholder interviews, and public meetings. These sessions were held at the City and County offices. Additional information was collected via phone interviews and emails sent by citizens wanting to participate. The goal of these sessions was to gather information that would guide the development of the survey tools. Participants included the City and County elected officials, the joint parks board, partners, alternate providers, and members of the public.

A summary of responses follows. Responses are not prioritized, but recurring responses are denoted by asterisks () . It should be noted that some participants chose not to respond during the sessions.***

Strengths

- ***Trail system
 - ***Paved bike trails/Centennial Trail
 - *Outdoor amenities
 - *Mountain biking
 - *Accessibility to trails from houses
 - *Diversity of trails
- *Diversity of parks and users
 - *Playground equipment
 - *Centennial Park – diversity of amenities
 - Attraction to outside visitors
 - Great open land and large parks
 - Activities/events in City parks
 - Pickleball courts
 - Clean parks
- *Partnerships with user groups
 - Volunteers

Opportunities for Improvement

- ***Lack of funding
 - Department scope very broad and beyond parks and recreation
 - Undeveloped park land
 - Add public art in parks and on trails
 - Improve ADA accessibility and ADA accessibility playgrounds
 - Lack of Indoor Pool
- *Dangerous air quality for months due to wildfire smoke affects outdoor recreation activities
 - Not enough shade in parks
- Operations/Regulations in park spaces
 - Off-leash regulations and enforcement in mountain parks
 - Concerns regarding safety in parks (loitering, vandalism, etc.)
- Parks should connect via trails and walkways
 - Open space could be overused if parks used only for recreation and not as an ecosystem
- Missing marketing opportunities
 - Unclear communication process, or partnership process
 - Users unaware of opportunities

Activities/Programs That Should be Enhanced

- *Inequity between residents and nonresidents
- Reserve pavilions and pay user fees
- Cultural Arts programs
- Sports Tournaments – not enough playing fields or gymnasiums for weekend tournaments
- Walking clubs and tours, guided tours (could use art in the park)
- Interpretive signage and programs
- Special events (movie nights, racing series)
- Additional winter activities (Grooming city trails for X-country skiing)

- Skill-building opportunities (woodworking, furniture refining, art classes, interior design, cooking, sewing, photography, pottery, etc.)
- Dance classes
- Health and wellness programming

Improvements Needed at Existing Facilities

- *Complete Centennial Park Trail
- *Connector trails from park to park and neighborhoods in both City and County
- *Restrooms in highly used parks
- New and improved signage at Mount Helena Park
- Disperse access to trails at Mount Helena Park
- Batch Park ballfields need to be upgraded – trees, shelters, restrooms, etc.
- Upgrade outdoor ice skating rink
- Tennis courts need to be redone
- Upgrade County Fairgrounds – trail around property
- Create a safe Centennial Trail crossing at Henderson
- Trail lighting
- Additional support services

Additional Amenities or Facilities

- ***Create a Parks and Recreation District with dedicated funding
- ***New indoor facility with ***indoor pool (8 lane, 25 meter competition pool, leisure pool, zero depth, slides, climbing wall, lazy river, therapeutic pool), **gymnasiums, *indoor turf, **indoor walking track, indoor playground / playspace
- *Multipurpose rectangle ballfields
 - Tournament Sports Complex
 - Dedicated pickleball courts
- Dog agility obstacle course
- Public Art should be utilized to beautify and inform parks
- Interactive amenities in parks

- Motorized recreation vehicles (ATV, ORV) area at North Park
- Playground in downtown area

Underserved Portions of the Community

- Rural County residents for trails
- Urban natural parks
- Pedestrians/Walkability around Helena
- Cultural and Arts
- Motorized recreation vehicles (ATV, ORV)
- Winter park users
- Low income families

Funding Opportunities/ Partners

- Realtors, Developers, Home Builders HOAs (North Star Homeowners Association)
- Alternate providers and programmers – US Forest Service, Bike Walk Helena, Friends of Centennial Trail, State of Montana, Bike Walk Montana, Prickly Pear Land Trust
- School District
- Waukesha Community Garden
- Hotels – encourage guests to ride bikes to trailheads versus driving
- Private entities
- Montana Independent Living
- Public Health agencies
- Helena Softball Association – and other associations
- YMCA – predominately older demographics, youth sports programs
- HRSA – Helena Regional Sports Association
- User Groups – Hikers, bikers, ATV riders, runners, sports organizations, snow mobile groups, Helena Lions Swim Team
- Hospital
- Medical Health Insurance Companies

Top Parks and Recreation Priorities

- **Create a Parks and Recreation District, find dedicating funding sources
- City and County cooperative effort
- Connectivity/Walkability
- Rectangle Sports Fields
- Sustainability – Infrastructure, maintenance, water, etc.
- Accessibility to All (ADA)
- More staffing/resources
- Reassessment of general fund allocations
- Create a Parks and Recreation 501(c)(3) Foundation
- Communication with the public
- Support partnerships
- Elevate the Level of Service in existing parks to an acceptable level for the community
- Indoor Pool

E. COMMUNITY SURVEY SUMMARY

The purpose of this study was to gather public feedback on Lewis and Clark County and City of Helena parks and recreation facilities, services, and programs. This survey research effort and subsequent analysis were designed to assist the City in planning for future improvements, developments, and services.

The survey was conducted using three primary methods.

Mailed Invitation Survey

Sent to randomly selected County residents

Online Invitation Survey

Accessed through a password-protected website for residents who received the mail survey

Open link Online Survey

Open to members of the public who were not part of the invitation survey

In total, 445 county-wide invitation surveys (262 from City of Helena residents) were completed through a variety of survey approaches. In addition, 407 open-link surveys were received (completed and partially completed). The invitation sample includes responses gathered from the mailed survey and online invitation sample. The margin of error for the invitation sample is +/- 4.6%.

The analysis herein primarily focuses on responses from the invitation survey of City of Helena respondents. However, invitation sample results are compared to the open-link results throughout the report.

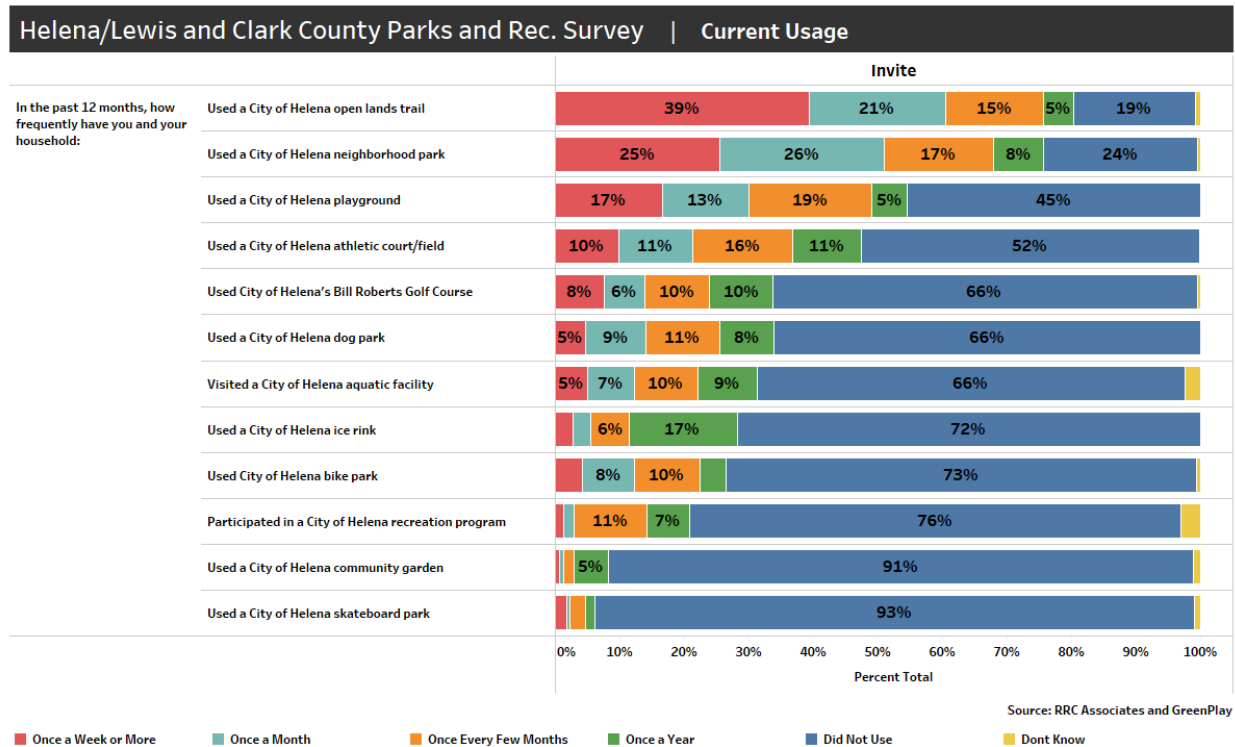
Summary of Survey Findings

The following is a summary of selected questions asked via the survey tool. More information can be found in the survey report and open comment report provided to the Department as a staff resource document.

Usage of Park and Recreation Facilities

Among invitation respondents (**Figure 13**), using a City of Helena open lands trail (80% used in past year), a City of Helena neighborhood park (76% used), and a City of Helena playgrounds (54% used) was most common. Following were and a City of Helena athletic court/field (48% used), Bill Roberts Golf Course (34% used), and City of Helena dog park (33% used).

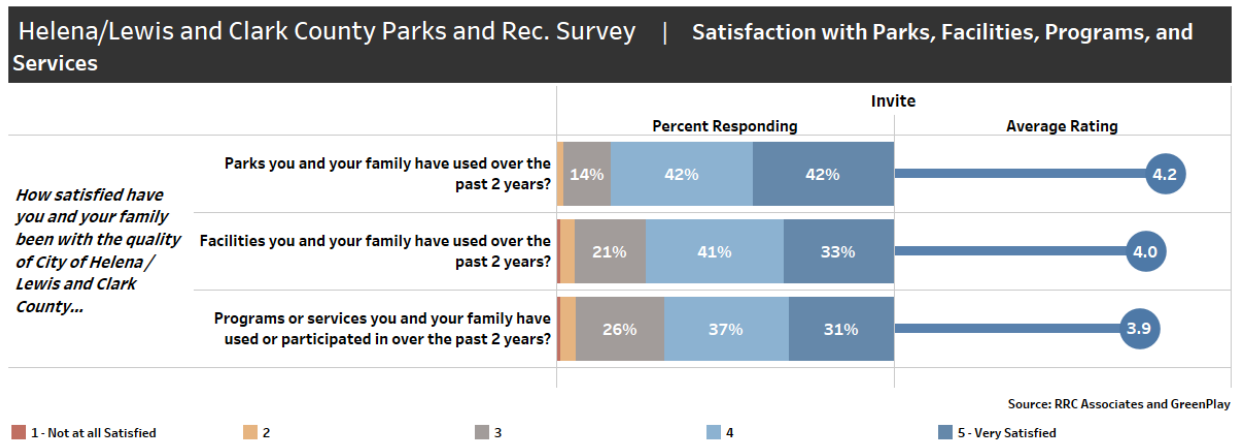
Figure 13: Usage of Park and Recreation Facilities



Satisfaction with Park/Facilities/Programs

Among invitation respondents (**Figure 14**), satisfaction with parks was rated an average of 4.2 out of 5.0, followed by 4.0 for facilities, and 3.9 for programs/services. Overall, residents have a positive satisfaction rating with most aspects of parks and recreation offerings, but there still are areas for improvement for a smaller segment of users.

Figure 14: Satisfaction with Park/Facilities/Programs



Satisfaction with Park/Facilities/Programs

An Importance vs. Needs-met Matrix compares the relative importance and degree to which needs are met for each amenity. Scores from invitation respondents are again displayed in the matrix using the mid-points for both questions to divide into four quadrants. **Figure 15** describes each of the quadrants within the matrix, **Figure 16** is a facility and amenity matrix, and **Figure 17** is a programs matrix. A red oval has been input on the matrix for added clarity. Amenities that exist within this oval are considered areas where the County should continue operations as is for the time being. Amenities that lie outside of the circle should be considered as opportunities or areas for improvement.

Figure 15: Importance vs. Needs Met Matrix Description

**High Importance/
Low Needs Met**

These are key areas for potential improvements. Improving these facilities would likely positively affect the degree to which community needs are met overall.

**High Importance/
High Needs Met**

These amenities are important to most respondents and should be maintained in the future, but are less of a priority for improvements as needs are currently being adequately met.

These “niche” facilities have a small but passionate following, so measuring participation when planning for future improvements may prove to be valuable.

**Low Importance/
Low Needs Met**

Current levels of support appear to be adequate. Future discussions evaluating whether the resources supporting these facilities outweigh the benefits may be constructive.

**Low Importance/
High Needs Met**

Figure 16: The Importance vs. Needs-met Matrix – Facilities/Amenities

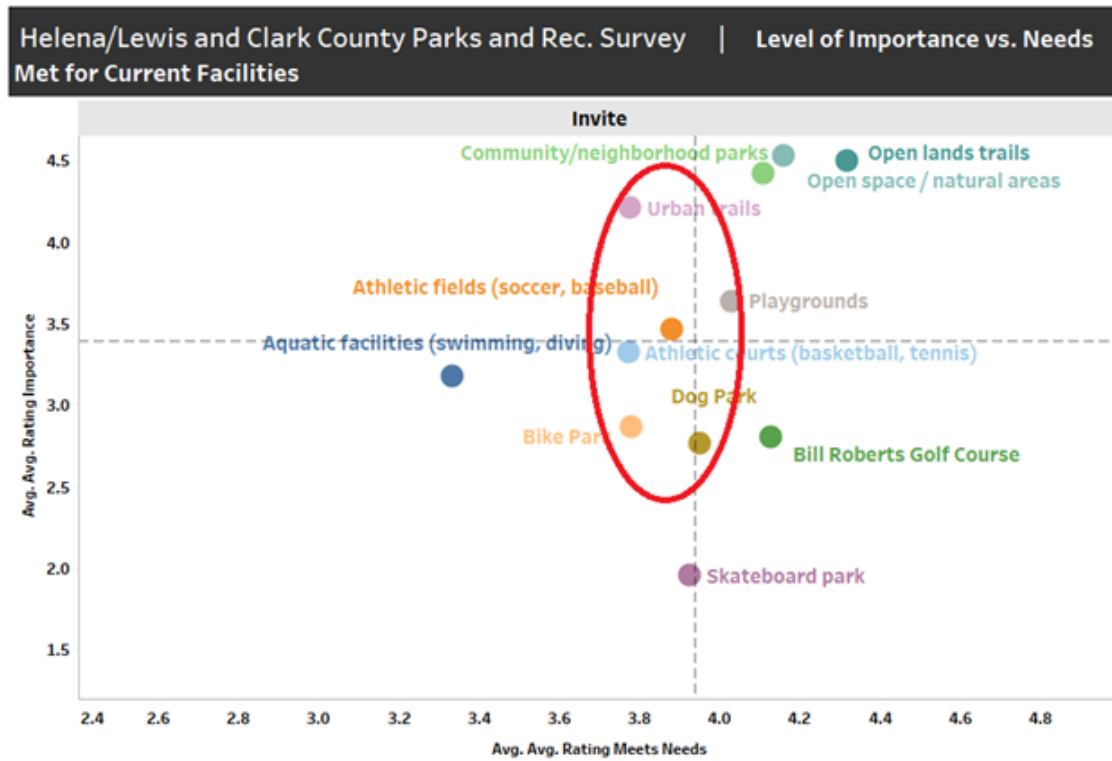
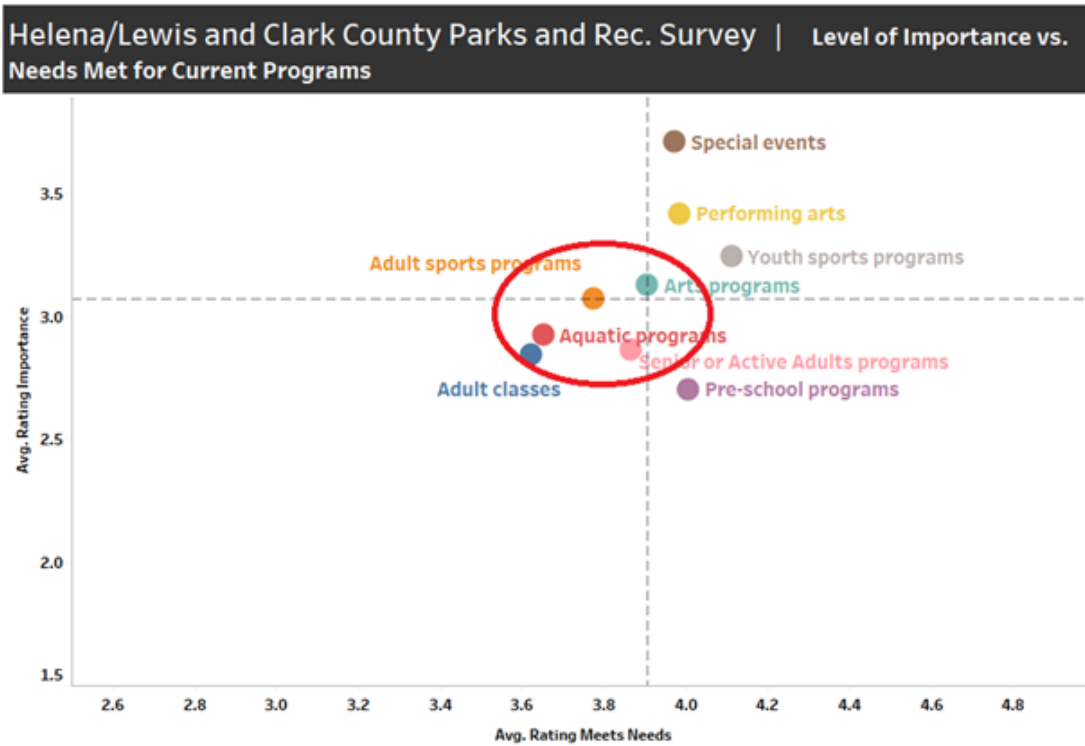


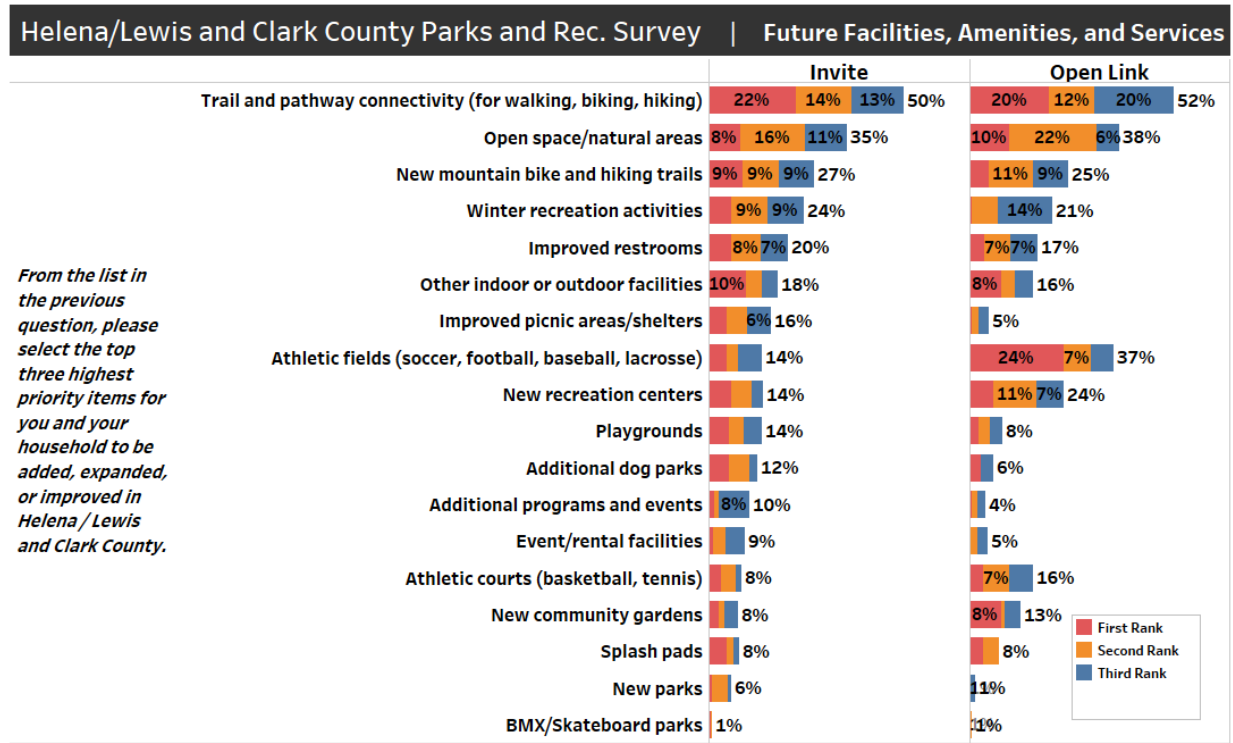
Figure 17: The Importance vs. Needs-met Matrix – Programs



Source: RRC Associates and GreenPlay

When asked to select their top three priorities for the City to add/expand/improve (**Figure 18**), invitation respondents were most likely to report trail and pathway connectivity (22% first priority; 50% total), open space/natural areas (35% total), and new mountain bike and hiking trails (27%). Open link respondents are similar in their priorities but had a much higher push for athletic fields (24% top priority, 37% total), new recreation centers (24%), and athletic courts (16%).

Figure 18: Priorities to Add, Expand, and Improve

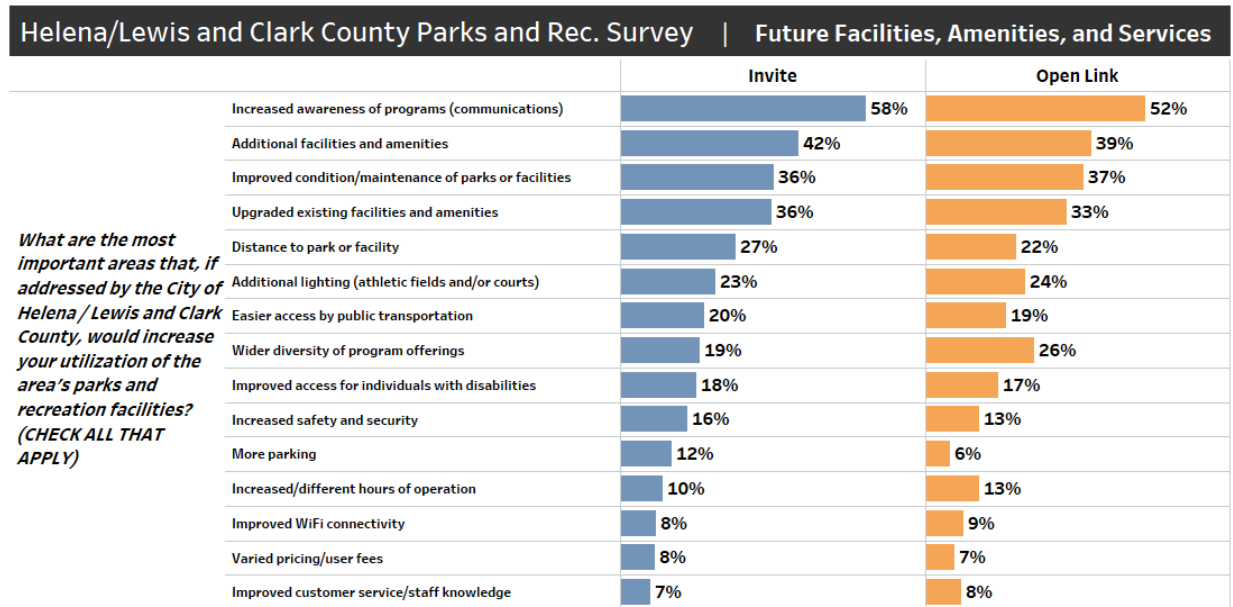


Source: RRC Associates and GreenPlay

Factors That Would Increase Usage

When asked what factors would increase their usage of City facilities (as shown on **Figure 19** on the following page), invitation respondents were most likely to highlight increased awareness of programs (58%), additional facilities and amenities (42%), improved condition/maintenance (36%), and upgraded facilities and amenities (36%). Following are the distance to park or facility (27%), additional lighting (23%) and easier access by public transportation (20%).

Figure 19: Factors that Would Increase Usage

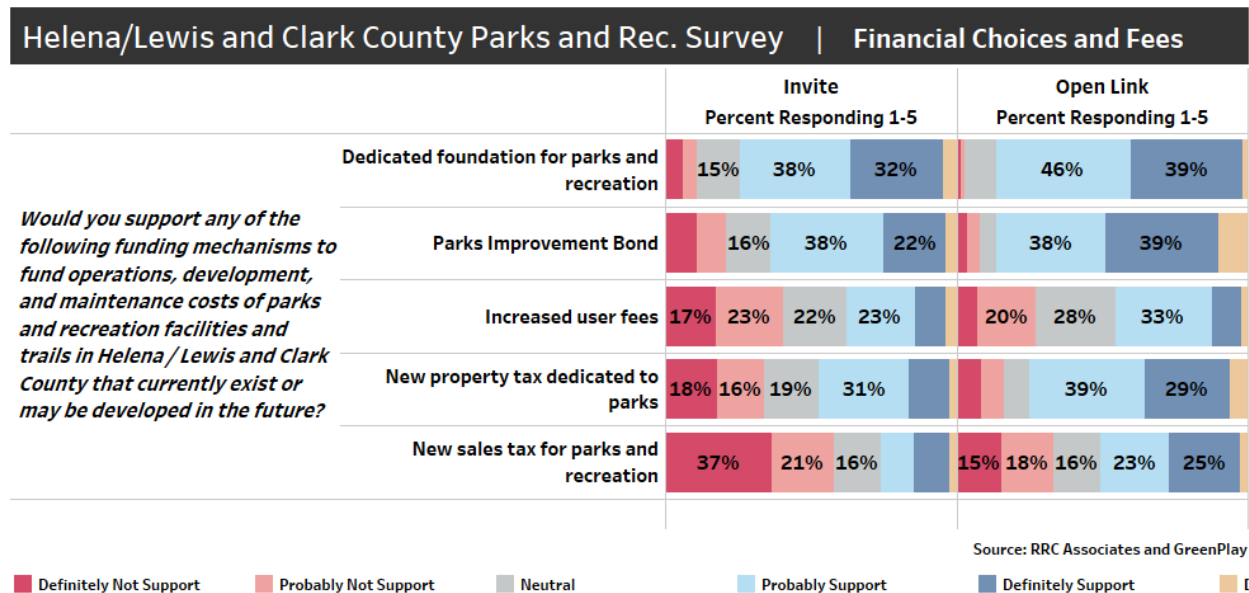


Source: RRC Associates and GreenPlay

Financial Choices/Fees

When asked about supporting funding mechanisms (**Figure 20**), invitation respondents were most supportive of a dedicated foundation for parks and recreation (70% would support) and a parks improvement bond (60% would support). New sales tax for parks and recreation (48% would not support), new property tax (34% would not support), and increased user fees (40% would not support) were less popular. Open link respondents were more supportive overall of most options.

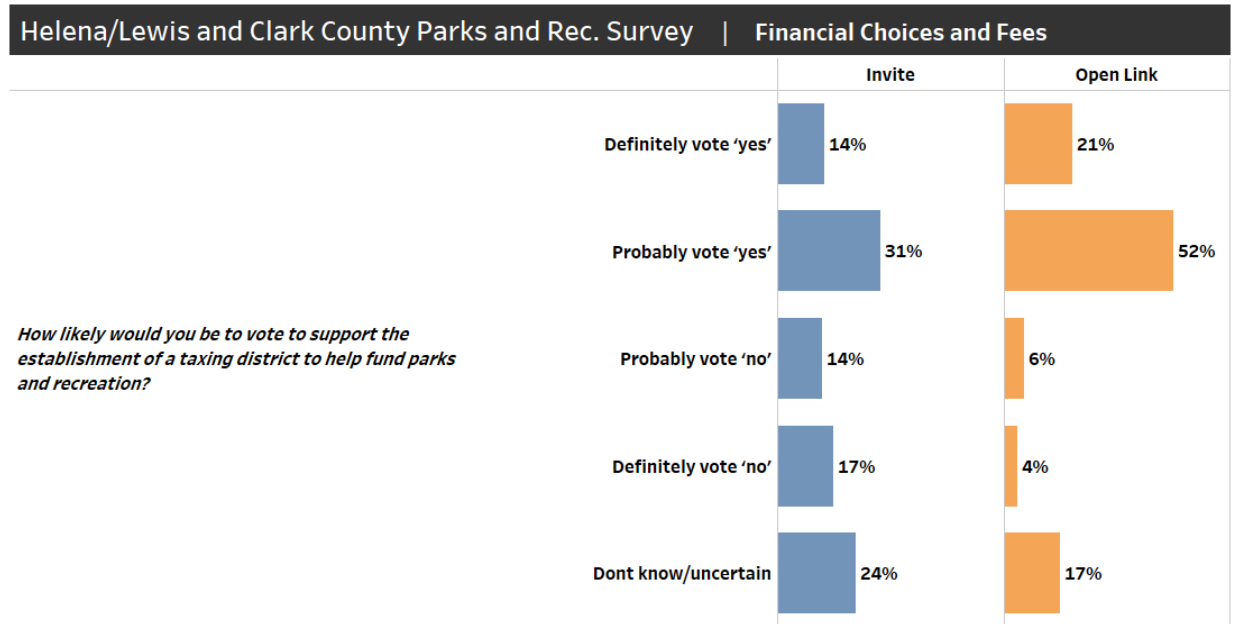
Figure 20: Level of Support for Funding



Source: RRC Associates and GreenPlay

When asked about creation of a special taxing district dedicated to parks and recreation services (**Figure 21**), 45% would support at this time with 31% who would not support. Nearly a quarter of respondents (24%) are uncertain or don't know if they would support at this time.

Figure 21: Support for a Special Tax District

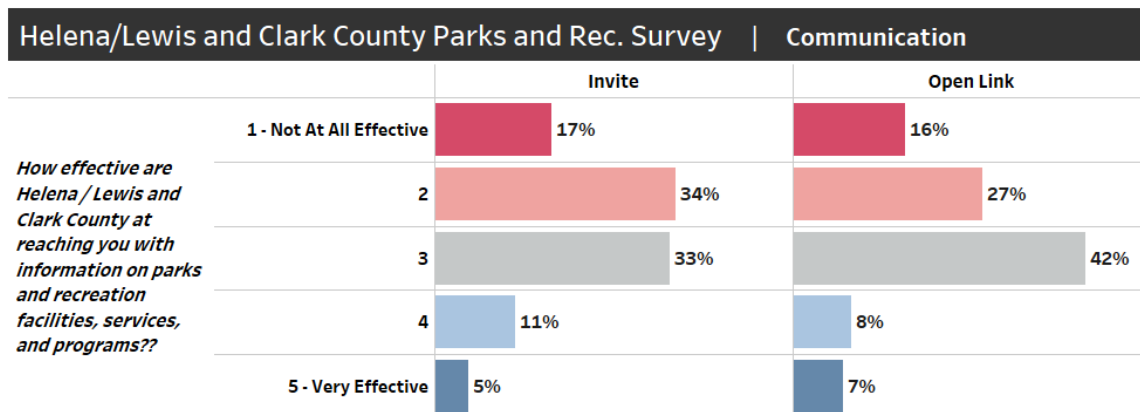


Source: RRC Associates and GreenPlay

Communication

Communication effectiveness of the City (**Figure 22**) was rated on a scale of 1 = “not at all effective” to 5 = “very effective.” In total, 16% of invitation respondents and 15% of open link respondents rated the City’s communication as effective (rated 4 or 5). In contrast, 51% of invitation respondents rated communication as not effective (rated 1 or 2) with 33% rating moderately familiar (rated 3). Open link respondents were similar, with a slightly larger percentage rating moderately familiar (42%).

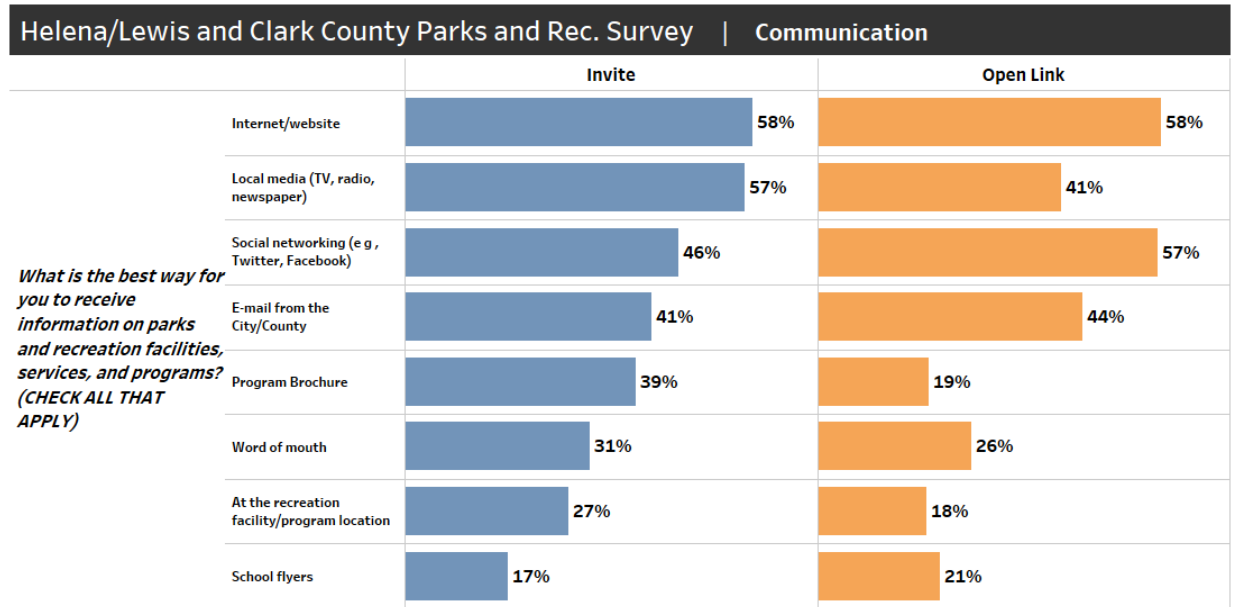
Figure 22: Effectiveness of Communication Efforts



Source: RRC Associates and GreenPlay

Respondents indicated internet/website (58%), local media (TV, radio, newspaper) (57%), and social networking (46%) as the best avenues to receive information (**Figure 23**). Following methods include e-mail from the City/County (41%), program brochure (39%), and word of mouth (31%).

Figure 23: Best Way to Receive Information



Source: RRC Associates and GreenPlay

III. SUMMARY OF KEY ISSUES

The project team used public input from focus groups, public meetings and the statistically-valid citizen survey, staff experience, consultant team expertise, and the level of service analysis to identify and prioritize the key issues pertaining to this planning effort.

A key issues matrix was provided to staff as a digital file and can be found separate of this document was provided to staff. Further description of each issue follows in **Section IV**.

The key issues are not mutually exclusive. They were categorized in like areas. This allows the team to tell a more complete story of issues within the plan. These categories, along with a brief summary of issues, are:

- Inventory and Level of Service
 - No clear vision for park system development.
 - Trail system should connect park-to-park and/or focus on commuter connections.
 - Area residents are looking for additional regional trail amenities and other outdoor opportunities.
 - Community is looking for upgrades and maintenance to current infrastructure.
 - Parks are missing key features desired by residents.

- Indoor facilities are not provided by City/County.
- Area residents are looking for additional access to water.
- Operational/Financial
 - Demand on Department resources is unsustainable.
 - Staff resources are limited.
 - Funding resources are limited.
- Programming
 - Community is looking for more programs.
- Marketing/Communication
 - Community was not fully aware of service profile.

Categorizing each issue and ranking them according to feedback, analysis, and professional experience allows the project team to tell a more complete story of opportunities within the Department. Further, it was used to develop recommendations based on the feasibility of the Department’s ability to capitalize on the opportunity. The next sections further detail these issues and provide recommended goals and action steps.



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IV. COMMUNITY NEEDS ANALYSIS

A. OPERATIONAL/ FINANCIAL ANALYSIS

Current Circumstances

The City Parks and Recreation Department works with a small staff that is tasked with operating a relatively large park system. Included in the Department's responsibilities are operational and maintenance tasks for boulevards, pathways, and other shared city spaces. Staff is also responsible for some of the recreational programming in the area, but many services are provided through partnerships with alternative providers.

The current staff is able to maintain the current level of service, but faces pressure during urgent issues due to a growing population base. Due to its location, the Department is a major service provider for residents in Lewis and Clark County and Jefferson County (a population roughly three times larger than the city's population and projected to increase faster than the city's as well).

Financially, the Department does follow a modified pyramid methodology, attempting to match user fees and tax subsidy with the individual and community benefit received from a service. Challenges facing the Department include the service profile itself, hesitation to increase fees for a public service, and defining the true cost of providing a service in the area.

Operational/Financial Analysis

The biggest issues facing the Department are due to the lack of resources, both staffing and financial, and the demand for additional services. In its current operations, the Department will not be able to sustain its high quality standards long-

term. There will be too much strain placed on the system by outside users. From the Regional Parks, Recreation, and Trails District Feasibility Study:

"Continuing current local government budget approaches will not be able to sustain existing parks and recreational programs over the long term. Expenses will increase as facilities age and suffer the effects of deferred major life cycle and maintenance costs. The reliance on volunteer labor to maintain parklands and provide scheduling and logistics is wearing down the volunteers. Revenues are not keeping up with expenses overall in the study area. The dependence on general fund revenues and subdivision 'cash-in-lieu' is a concern."

Many long-term strategies have been researched and discussed in previous years. Most recently, a study determining the feasibility of creating a parks district was conducted. This remains a strong option, as it would help mitigate the funding issue by drawing tax money from a more representative user group. However, there are many logistical issues and challenges in implementing a district.

While a district seems like the logical long-term goal for the Department, it should look at ways to consolidate operations with other public agencies in the short-term and push to generate an appropriate amount of revenue with its current infrastructure. Creating these efficiencies now also allows for a smoother operational transition in the future. The Regional Parks, Recreation, and Trails Feasibility Study defines "Alternatives for Management and Funding," including:

- A no-change scenario
- Coordinated management between jurisdictions
- Other new actions by individual jurisdictions (new taxes or funding strategies)

Each scenario is presented with definitions of the scenario, sustainability assessments, and projected costs and revenues.

From the Regional Parks, Recreation, and Trails Feasibility Study:

“Working regionally to address parks, open space, trails, etc. has potential to increase overall benefits in the region and those of individual jurisdictions as well. Regional efforts have greater likelihood of receiving certain types of grant funds. Creating a regional funding mechanism could leverage a greater array and amount of funding.

The current approach to budgeting costs and revenues for parks, trails, open space and programming is not sustainable in the long-term. Revenues are simply insufficient to cover long-term costs of maintaining existing resources over the long term. Except for a very small portion, revenues are not dedicated to parks and consequently funding is potentially unstable. The most reliable source of long-term funding would be dedicated tax revenue, established through a multi-jurisdictional Regional Special District or separate improvement districts created by each jurisdiction.”

Since the district is a long-term goal, each jurisdiction can and should take short-term steps toward consolidating operations.

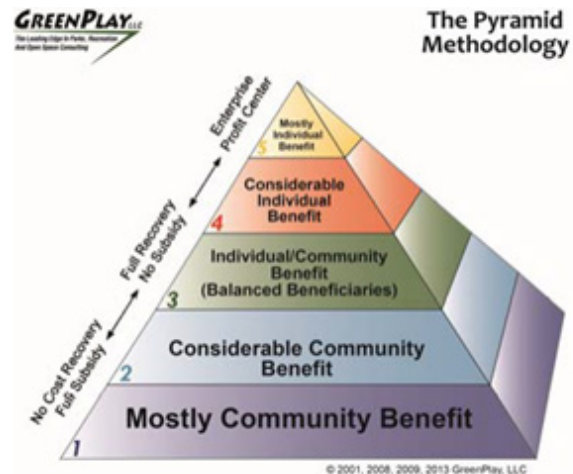
From a staffing perspective, users would benefit from joint staff within the City and County, namely, marketing staff and a recreation manager. Creating these two positions would allow the Department to manage the current demand of the system, while also allowing the County to shift recreational responsibilities away from a department without dedicated staffing. These two positions will be key in the success of joint operations in the long-term, and should be considered as short-term opportunities to build advocacy for a larger, more cohesive park system in the future.

In addition to the small tax base, the Department should look to further develop its user fees. The

foundational philosophy adopted by the City is a model that is used across the country as a way to balance the use of taxes and user fees with the respective markets in different communities.

Figure 24 is a representative model of the methodology.

Figure 24: Pyramid Methodology



This model matches the number of fees/charges or tax subsidy for each program and service area with who is receiving the benefit of the program. For example, if the community receives most of the benefit of the program or service (park provision) then more tax subsidy will be applied to its costs. Adversely, more individual benefit (lessons) will allow the department to recover, or charge for, a higher percentage of the cost to provide the service. This model allows for the volatility of a given market-place and allows for the Department to consider continuously consider investment or divestment of given programs based on the markets willingness to pay for the actual cost of operations.

Further, it allows a deeper understanding from the public and elected officials which in turn creates trust and advocacy for the system. The challenges that the Department is facing is with its implementation. The Department has not found an accurate cost of doing business, and as such, is finding challenges in communicating the need for an increase in fees. Without this key piece of information, the Department has struggled to convey its true financial situation and is hindered

by the perception that public services should be priced so that everyone can afford it, or that they should come as a free service to the public. Operating this way, and considering the additional strain on the system, which is projected to increase over time, is not sustainable. Additional information regarding this cost recovery methodology was provided to the Department as a Staff Resource Document.

Other Potential Funding Support

While fees and charges are one way to financially support the Department, there are multiple opportunities available for ongoing operations/maintenance as well as capital/project related needs. Staff conducted a funding exercise where they were given a listing of over 150 funding sources used by recreation agencies around the country. Staff was asked to sort the opportunities into four categories – In Use, Definitely Consider, Possibly Consider, and Would Not Consider. The following section lists the opportunities that the Department would consider. The exercise has been provided to the Department as a staff resource document, including definitions of each opportunity.

Opportunities to Definitely Consider

- Local Improvement Districts
- New Markets Tax Credit (NMTC)
- New Partnership Opportunities*
- New Advertising Sales
- Corporate Sponsorships*
- Naming Rights
- Gift Catalogs
- Irrevocable Remainder Trusts
- Maintenance Endowments
- Capital Improvement Fees
- Development Surcharge/Fee
- Processing/Convenience Fee
- Recreation Surcharge Fee on Sports and Entertainment Tickets, Classes, MasterCard, Visa
- Utility Roundup Programs
- Leasebacks on Recreational Facilities
- Subordinate Easements - Recreation/Natural Area Easements
- Contract renegotiation
- Rooftop gardens and park structures

- Use light, water, and motion sensors
- Use electric and hybrid vehicles
- Develop “Pack It Out” trash program
- Use greywater
- Use solar and wind energy
- Recycle Office Trash
- Clean offices less frequently
- Flex Scheduling
- Virtual Meetings
- Eliminate Environmentally Negative Chemicals and Materials
- Green Purchasing Policies
- LEED® Design Principles
- Public Education
- Incorporate Stewardship Principles in all Park and Recreation Services

Opportunities to Possibly Consider

- Sales Tax
- Daily Admission, Annual Pass Sales, and Vehicle Parking Permits
- Industrial Development Bonds
- Annual Appropriation/Leasehold Financing
- Commercial Property Endowment Model-Operating Foundation
- Irrevocable Remainder Trusts
- Life Estates
- Raffleing
- Equipment Rental
- Flexible Fees Strategies
- Franchise Fees on Cable
- Parking Fees
- Percent-for-Art Legislation
- Recreation Service Fees
- Residency Cards
- Real Estate Transfer – Tax/Assessment/Fee
- Room Overrides on Hotels for Sports Tournaments and Special Events
- Trail Fee
- Cell Towers and Wi-Fi
- Private Concessionaires
- Film Rights
- Licensing Rights
- Manufacturing Product Testing and Display
- Recycling Centers
- Surplus Sale of Equipment by Auction
- Positive Cash Flow
- Go Paperless

*A sample partnership and sponsorship policy for the Department is provided in **Appendix B**.

Operational/Financial Recommendations

- Continue to pursue strategies that move toward consolidating resources identified in the Regional Parks, Trails, and Recreation District Feasibility Study.
- Continue to evaluate and implement Cost Recovery policy and the need to increase program and services fees.
- Communicate the cost of doing business and price programs and services accordingly.
- Pursue alternative funding sources identified in the funding exercise.
- Create a full-time joint staff members.
- Evaluate and strengthen partnership agreements with other agencies.
- Develop sponsorship policy and opportunities.

B. INVENTORY AND LEVEL OF SERVICE

What is Level of Service?

Looking at the physical layout of the system and comparing it to the population centers identified in the demographics report, area residents live in close and reasonable proximity to a variety of park types. Neighborhood parks are generally the closest to residential areas, followed by community parks and regional or sports parks. National providers also extend the service profile of the area for individuals or groups that are able to access those types of amenities.

Each park type should also follow a similar pattern when being developed. For example, community parks, which are generally the closest to homes, should be smaller in relative size and contain a higher number of amenity or activity options (playgrounds, small picnic areas, a trail access, etc.), while a national park is known as a place of seclusion with much larger acreage and larger scale amenities (lakes, trails, forests, etc.).

Specialty-use parks, like memorials or sports parks, are also found within the system. These parks have a more specific draw and purpose than general amenities, like a playground or picnic shelter, and should be considered on a site-by-site basis.

Level of Service Analysis

Comparing the system to the trends report, area residents live within close proximity to many desirable opportunities (camping, open water, trails, regional biking opportunities, etc.). Service providers in the area should be looking at ways to bring those larger scale opportunities into community or neighborhood parks, like nature play opportunities, walking paths that connect to hiking paths, and local biking trails that connect to regional commuter trails. Additionally, sport-specific uses are in high demand by area residents and in line with national trends. Future development should consider space required for additional, multi-use fields or a sports complex.

When looking at the community survey and focus group responses, participants noted that they are highly satisfied with the quality and quantity of recreational services in the area, and thought it was most important to maintain and upgrade the current infrastructure moving forward before building or developing new amenities. Some of the upgrades that were noted that would improve the level of service were increased routine maintenance, picnic shelters, support services, and more trail connectivity.

Indoor facilities do not necessarily factor into a level of service analysis. However, it should be noted that the community identified that the lack of an indoor facility (with public access) does create a service gap. As a cold weather community, it is no surprise that this was identified during the community outreach portion of the project. Indoor, multi-use spaces are a key piece within recreational space that provide opportunities for a wide range of programs and can help supplement the use and demand for outdoor facilities.

While a high percentage of the population lives close to a park, distance is not the only determining factor indicating equitable and accessible service. Community members experience barriers that hinder their ease of access to parks and recreational services. Barriers may include dangerous street/railroad crossings, operational policies, awareness, and access to services like a car. There are number of open or unimproved park sites in the system, particularly at the County level. These sites should be evaluated for development to improve service to specific geographic areas within the region.

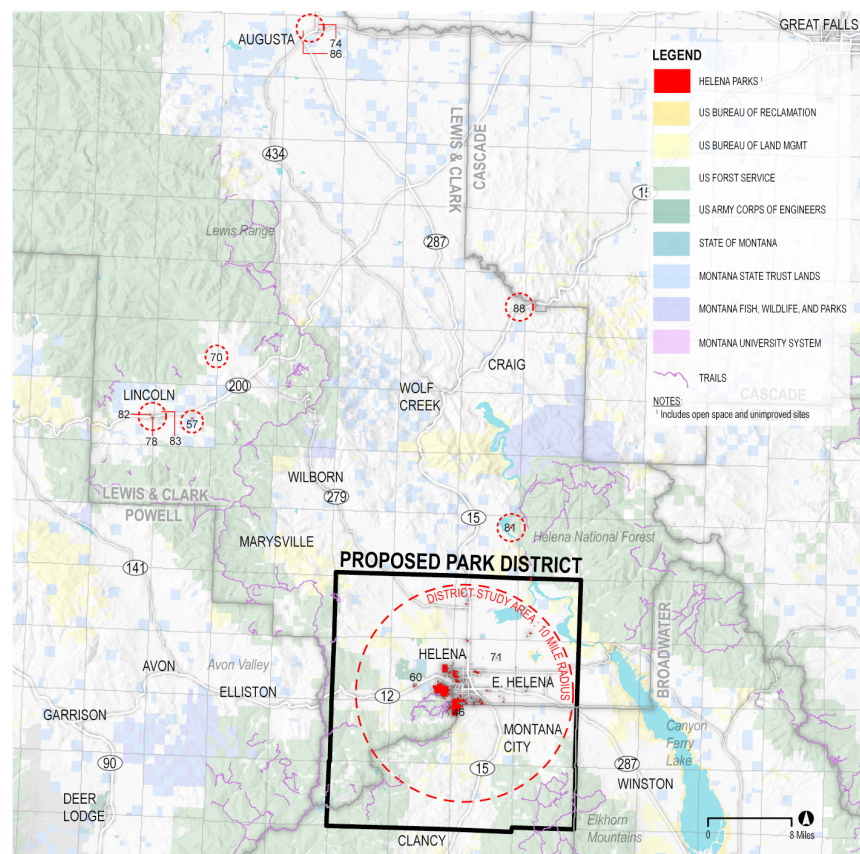
Because of this finding, and the previous operations analysis, a level of service analysis was conducted on the regional system, rather than for individual jurisdictions (**Figure 25**). (It should be noted that parks within Jefferson County were not analyzed in this study, but were included in the district feasibility study.) To analyze the level of service within the system each city- and county-owned park, within the original district boundary identified, each park was categorized based on three approximated catchment radii and then a buffer was applied to each park to spatially represent a catchment zone.

Inventory and Level of Service – District-wide

The Regional Parks, Trails, and Recreation District Feasibility Study describes how the community recreates on a regional level:

“The recreational resources in the study area are for the most part regional resources (with the exception of a few neighborhood parks.) Certainly the trails and open space are regional amenities and residents’ expressed desire for connecting trails reflects this. Residents of the area may identify their residence or workplace with a specific jurisdiction, but when it comes to recreation, the distinctions between jurisdictions is often unclear to people or simply doesn’t matter. Driving or biking from east to west or north to south across the region, most people do not care to distinguish if they are in the county, Helena, East Helena, or Montana City. For recreationists, it is the experience that is important.”

Figure 25: District Boundary within Region (Larger map available in Appendix)



The Proposed Park District, as shown in **Figures 25 – 27**, is based on the 10 mile radius generated in the Feasibility Study. The District boundary is aligned to the closest Public Land Survey System (PLSS) townships and range grid lines beyond the 10 mile radius for simplicity sake. If the City and County decide to move forward in creating a Park District, this boundary needs to be evaluated in detail and population growth trends and land ownership should be evaluated, among other features.

Park categories include:

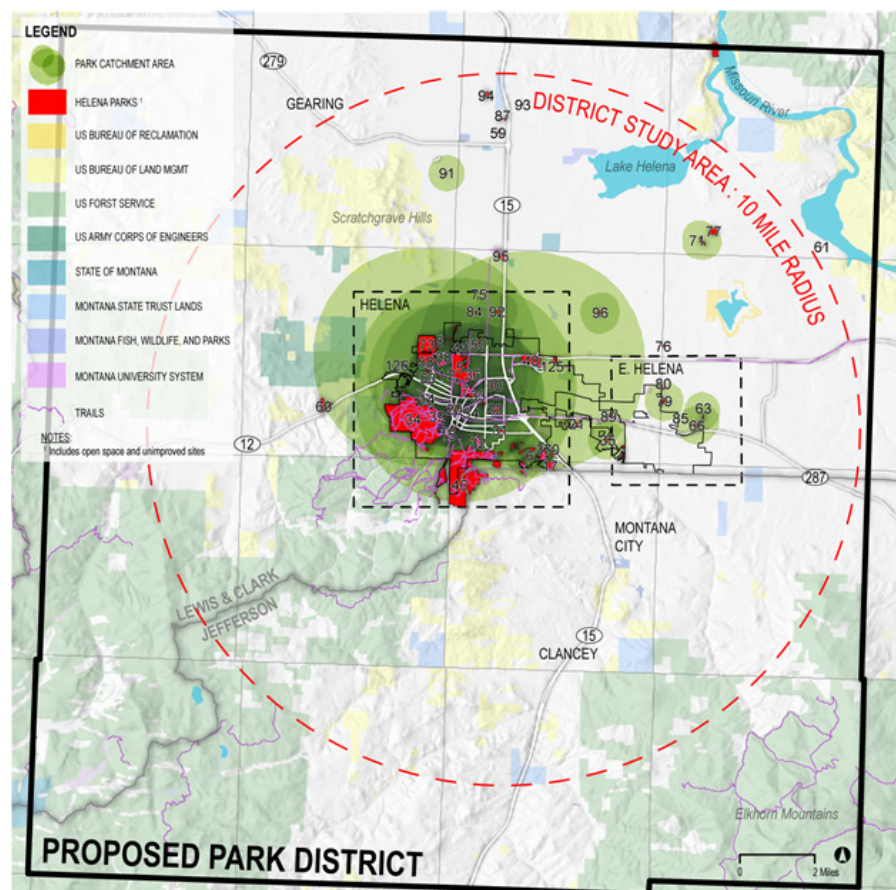
- *Neighborhood park* – A park or site that can be considered a neighborhood gathering place or is embedded within a residential neighborhood. Community members will generally walk to this type of park from their residence. Amenities in the park are generally higher density, including playground equipment, benches, smaller courts, splash pads, paved walking paths, horseshoe pits, picnic areas, etc. These parks are generally smaller than other types of parks. The catchment area for this type of park is set to a 0.5 mile radius, which can typically be covered by a pedestrian in 10 minutes.
- *Community park* – A park or site that can be considered a gathering place for multiple neighborhoods. Community members will typically drive (but sometimes walk) to these parks. Amenities may include destination playgrounds, ball/

sport fields and courts, dog parks, picnic shelters, regional trail access, etc. The catchment area for this type of park is set to 1 mile radius.

- *Regional park* – A park or site servicing a larger region. These are generally the largest parks, and contain larger amenities like multiple ball/sport fields, hiking trails, water access, and nature areas. The catchment area for this type of park is set to 3 mile radius.

After the catchment zones were applied to each park, they were overlaid on the system base map, and the resulting heat map depicts the level of service; dark colors on the map show a denser aggregation of catchment zones which in turn represent higher levels of service in the given area. **Figures 26-28** are depictions of these heat maps. Larger format resources can be found in **Appendix C**. Digital files and layers for these resources have also been provided to staff.

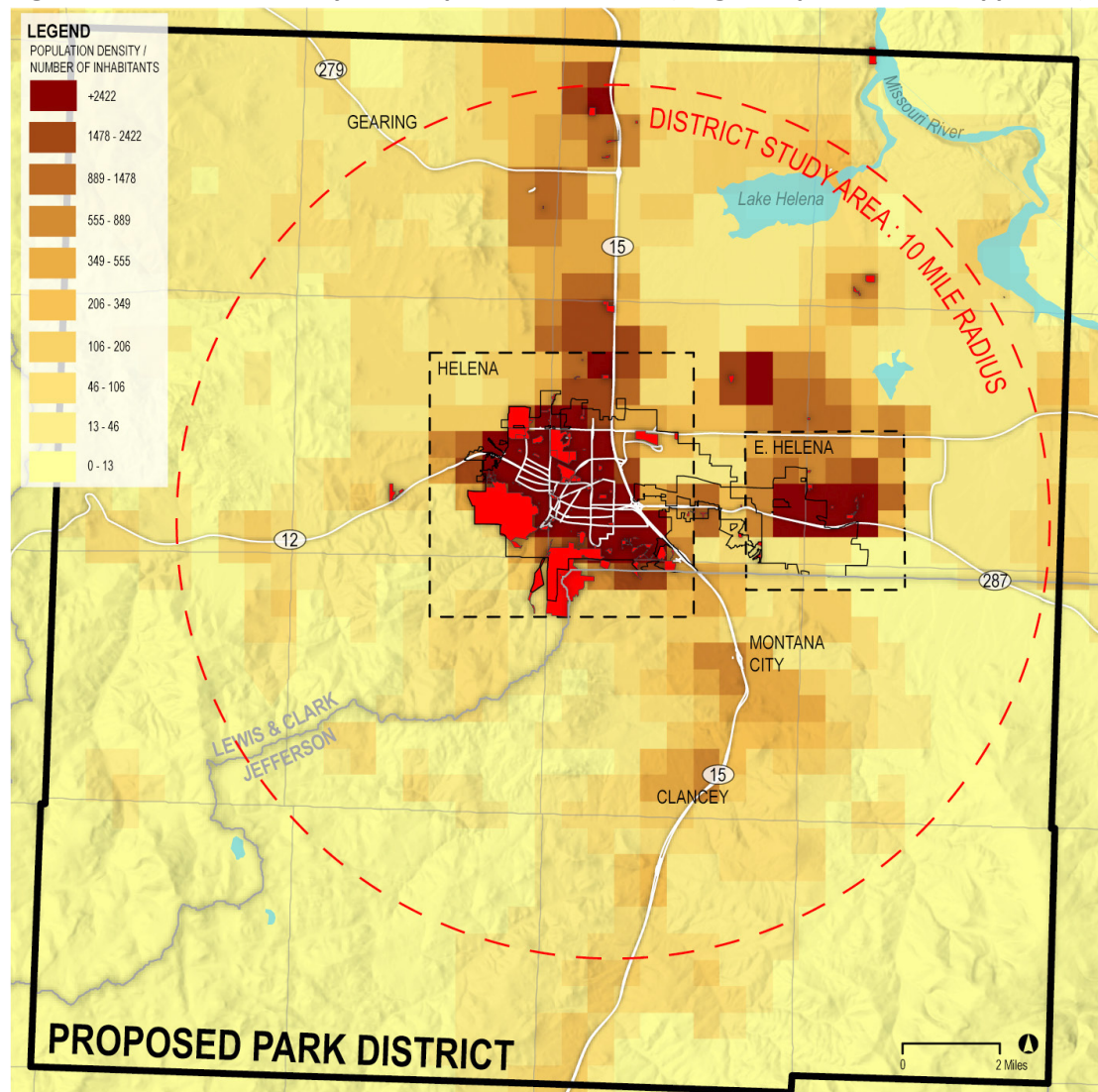
Figure 26: Park Level of Service (Larger map available in Appendix)



The goal of system distribution is not necessarily to ensure that all areas have equal access to parks within the system. Appropriate distribution should be determined by evaluating land-use, zoning, or population densities in the region. Residents in Helena receive a high level of service. They generally live in close proximity to all park types with a variety of components. Further considering the level of service provided by alternative providers, like national and state parks, area residents live in very close proximity to a wide range of recreational opportunities.

If a district is to be considered then growth or expansion of the system will likely happen in East Helena, Jefferson County, and Lewis and Clark County, as predicted in the District Feasibility Study and the demographics projection of this report. **Figure 27** depicts the population densities within the proposed district. Park impact fees, parkland dedication, and fees-in-lieu should fund much of this growth, ensuring that the community's quality of life services grow at the same rates as residential and commercial development. A district may also change the profile of services offered within the city.

Figure 27: District Boundary with Population Densities (Larger map available in Appendix)



Community parks in the city may be able to develop further into destination type parks to include larger or themes amenities, like playgrounds, public art installations, or heritage resources/walks/installations.

While the Park District is a long-term strategy to serve the residents of the region, the Department maintains the responsibility to provide a high-quality service to its residents in the short-term. In order to continue to maintain a high level of services, the Department should:

- Place a priority on addressing the aging or distressed park components within parks through the Capital Improvement Plan (CIP).

- Address barriers to access within the existing infrastructure by partnering with the City departments responsible for sidewalks and bike path development. Barriers to access include railroads, major roadways, crosswalks, etc. (Trails throughout the district are depicted in **Figures 28 and 29**).
- Partner with alternative providers to identify key regional trail connections, allowing residents to access parks outside of the city boundaries. (Trails throughout the city are depicted in **Figure 28 and 29**).

Figure 28: Trails within the District (Larger map available in Appendix)

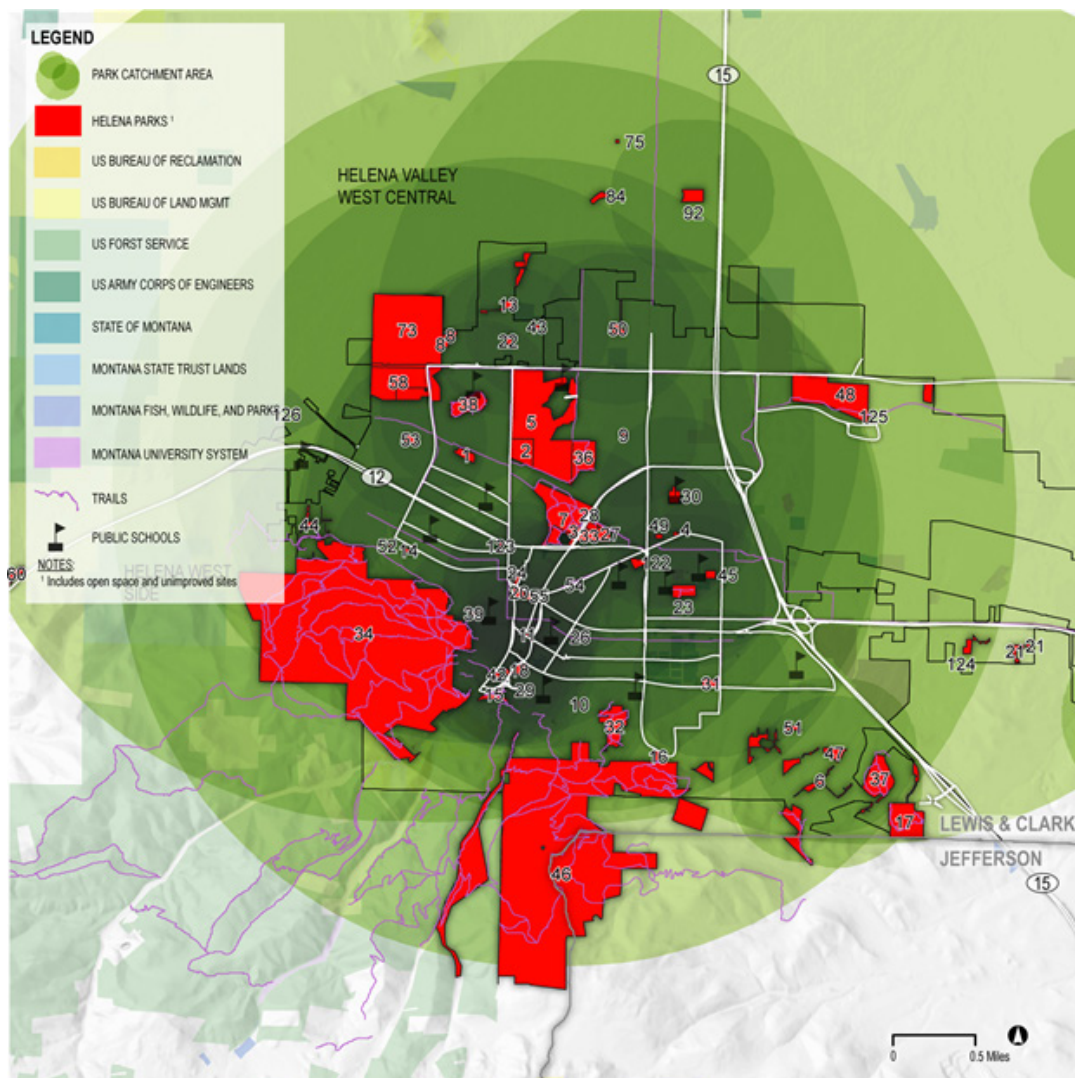
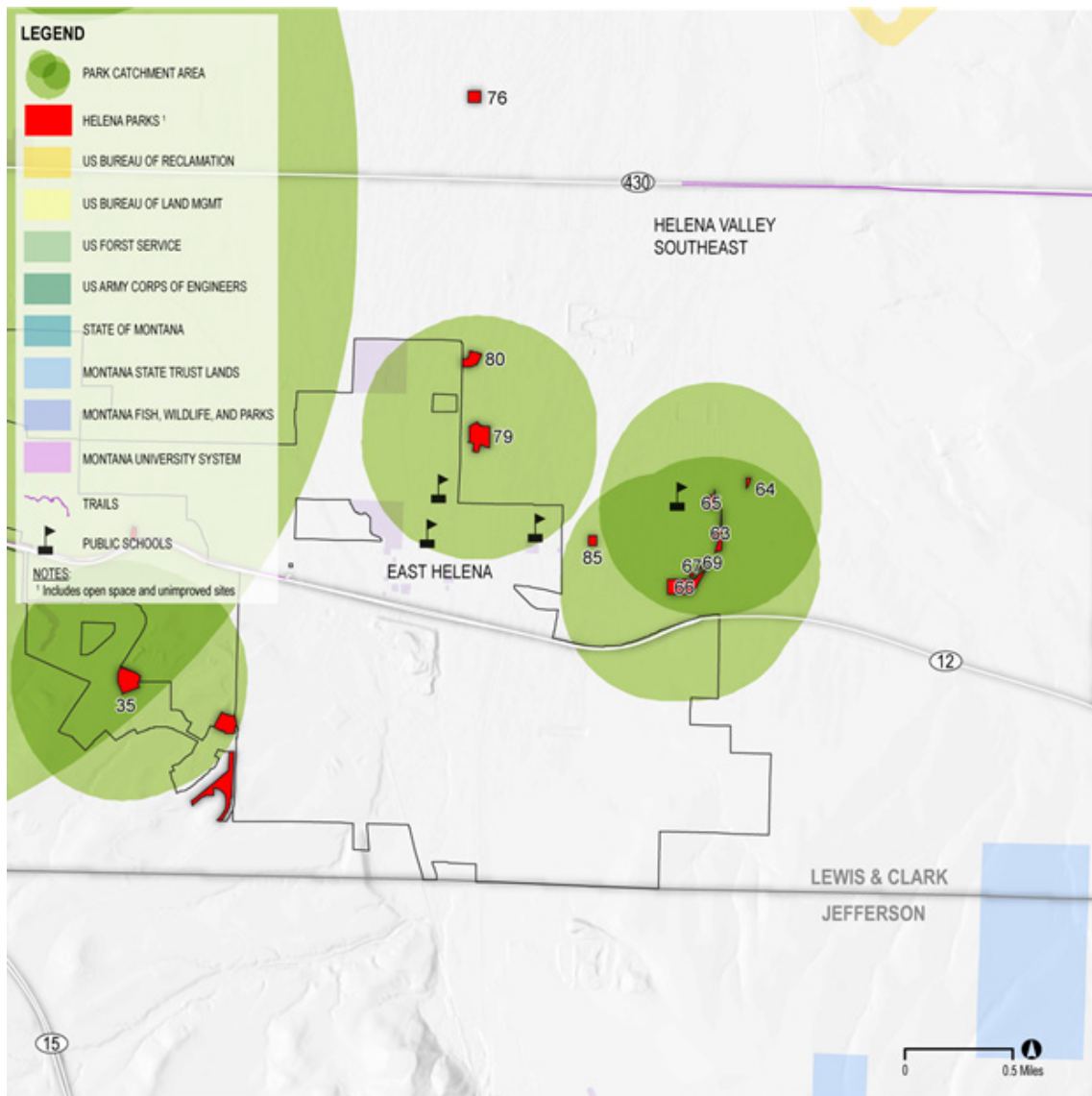


Figure 29: Trails East of City Center Larger map available in Appendix)



Having these plans in place and reviewing them on a yearly basis will allow the Department to ensure consistency in addressing maintenance standards, developing cost efficiencies, and increasing the quality of life for residents in the region.

Inventory and Level of Service Recommendations

- Focus short-term strategies toward maintenance of aging or distressed components in the park system.
- Develop way-finding opportunities in parks and online.
- Partner with other City departments to identify and plan for key barriers of access to parks and recreational components.
- Evaluate development codes to ensure appropriate growth in the community.
- Continue/strengthen partnerships with alternate trail providers and partners including the Regional Trail Steering Committee.
- Update Open Lands Plan.

C. PROGRAMMING ANALYSIS

Current Circumstances

Much of the Department’s programming focus is on the provision of the park system. The Department does offer programming, like park-based fitness classes and events, but most of the traditional recreational programming (sports, art/education classes, fitness, etc.) are provided through partnerships with organizations like the YMCA, or by the private industry in the area.

Based on feedback from the focus groups, public meetings, and survey, the community is satisfied with the diversity and quality of these efforts, but is looking for more access to indoor recreational opportunities. Without dedicated indoor space or programming staff, the Department cannot invest in new programming without taking significant resources from other core services such as operations and maintenance. There is currently a coalition of community members that are organizing around creating an indoor recreation facility.

The Department is also challenged because of the amount of people utilizing services in the area. While the population of Helena is approximately 30,000 people, it has become the public service provider to approximately 110,000 people in the area. Considering that the population in the County is expected to grow faster than the population in the City, the Department will continue to face public pressure for services it does not have the ability to support.

Recreation Programs Analysis

While the Department is looked upon favorably in providing programs and activities to the community, there is always an opportunity for improvement to the current system.

Areas that have been identified for improvement or re-evaluation include:

- Improvements in marketing and communication
- Build stronger partnerships
- Cultural and special events
- Growing the volunteer programs
- Indoor recreation programming – would require deeper partnerships
- Pickleball
- Increasing interpretive/educational opportunities to help user better understand and appreciate the land
- Changes in fee structure

The Department does not have the current resources to build additional programming into its service profile on a large, permanent scale, and it should not be considered the sole responsibility. As such, developing deeper partnerships will be key to providing more services in the area. Partnerships that need to be evaluated include Lewis and Clark County, Jefferson County, schools, alternative providers like the YMCA, sporting associations, the United States Forest Service, and other organizations that help serve the mission of the Department.

A strong short-term opportunity in the Department exists with volunteer opportunities and programs. The Department currently offers these programs to individuals, associations, and clubs, but does not have the dedicated staff required to recruit, train, and manage a larger volunteer base. This also needs to be communicated as there is a perception that the Department does not have volunteer opportunities or does not utilize the volunteer base available.

Athletic fields are a similar opportunity but are generally directed at a different demographic. While these spaces tend to show lower relative importance in the survey, they are high impact amenities, especially for youth. The community would benefit from additional fields, but the Department should consider how they would be provided, and if it is the primary provider of such a facility.

Limited staff is a significant issue facing the Department. Growth in amenities of any kind will result in the need to program, coordinate, and schedule services and activities to mitigate user conflicts. In its current form, the Department should not be looking to add amenities or program, but rather improving the quality of existing offerings and strengthening partnerships.

Programming Recommendations

- Continue to evaluate current offerings for efficiencies, and opportunities to provide more value through programming, including increased user fees.
- Develop more organized volunteer programs.
- Continue to evaluate and strengthen strategic partnerships with alternate providers.
- Support the efforts of the collaborative YMCA/HRSA indoor facility project at the best new location.

D. MARKETING/ COMMUNICATION ANALYSIS

Current Circumstances

During this study, the community seemed unaware of the entire service profile of the Department. Many participants were surprised to learn of the size, location, and breadth of the system. Though much of this can be attributed to the size of its staff, the Department could increase marketing efforts to improve the community's understanding of its services. By expanding marketing efforts, the Department could take immediate action to help raise community awareness, grow participation, and increase its overall advocacy.

Strategic Marketing and Communications

While the Department does not currently have dedicated marketing staff, it should be commended for its efforts to date, utilizing available resources and services where appropriate. This can be taken further by developing messaging and educational campaigns around the Departments core services, targeting its communication, and consolidating marketing efforts.

Marketing and communications is a business function that requires full-time attention and management, but it is often seen as a secondary service that is assigned to a staff member that is perceived to have the time or ability to manage the efforts of an entire Department. While the Department may not have the resources to dedicate staff resources to a larger marketing effort, contracted services are an option as well. The Department's first step should be to develop a strategic marketing plan, which:

1. Develops a consistent brand for the Department.

The Department already has a brand, or perception. The Department should define how it wants to be perceived and develop strategies that promote that perception. Today, marketing has evolved from a product-focused strategy to an idea or story-focused strategy. People are connecting with brands that tell the best story and with which they identify. The Department is in a unique position by being a public agency, and as such, it already authentically represents its market.

2. Develops goals for the marketing effort as a whole.

These goals should be unique to the Department. One of the biggest mistakes made in marketing is not defining goals that promote the brand, story, and authenticity of an agency. Setting goals that are not unique to the Department will make it difficult to communicate its value to residents and visitors.

3. Defines target markets and segments.

Defining the target market for the Department goes deeper than “all of Helena.” Underserved portions of the community were identified in previous sections, as well as demographic segments which are expected to grow. Focusing efforts on market segments streamlines communication, and allows the Department to communicate directly to a select group rather than having its messages muddled when trying to communicate with the City as a whole.

4. Defines the goals for each channel of communication.

Due to the nature of the Department’s services, its marketing channels can take on wide-variety of forms, including:

- Facilities and amenities
- Recreational programming
- Events, festivals, and concerts
- Environmental education and conservation
- Level of service
- Pricing
- Social media, including the website
- Print media
- Online media/video
- Mobile applications
- Online searches
- Text
- Email
- Signage/wayfinding
- Educational signage
- Ranger programs

Each channel, and subsequent goal, should be developed with specific target markets in mind. For example, Millennial populations should be engaged through fitness opportunities promoted through mobile applications.

5. Defines the content guidelines for each channel.

Content guidelines should also be developed so that messages consistently reinforce the brand, story, and goals of the marketing efforts.

6. Defines evaluation methods for marketing efforts.

Lastly, evaluation methods should be based on the brand, segments, goals, and content that is unique to the Department. To establish and reinforce the Department as an authentic brand it needs to focus on evaluating its own efforts. If efforts are evaluated based on other benchmarks, the Department may inaccurately conclude the success or failure of its effort.

Each of the items above can be read as steps of where to start, meaning that if the brand of the Department is not defined, it cannot necessarily evaluate its current efforts. Or if the Department does not have a target market then it cannot evaluate its channels. Without these steps in place, marketing efforts cannot effectively be developed or evolved.

The Department should look for ways to integrate these strategies into its current efforts. Overhauling an organization’s branding efforts is a significant undertaking. Since the Department has many developed channels, it should start by looking for ways to incorporate some of the opportunities identified by the community. For example:

- Goals could involve community education, specifically regarding historic and cultural heritage of the area, natural resources, programming opportunities, the value parks and services to the community, and the Department’s mission and core services.
- Target markets could involve the County, underserved populations, highly engaged users, partners/sponsors, non-users, specific activity groups, etc.

Marketing Recommendations

- Develop a 2-5 year strategic marketing plan.
- Provide additional marketing resources.
- Provide more communication about partners and programs.
- Continue to establish platforms for outreach/feedback.
- Continue to develop multi-cultural, art, or historical opportunities.

V. ACTION PLAN

The final deliverable for Phase 2 will result in a prioritized timetable for the development of parks, recreation, and open space, sorted in to the following priorities:

- Immediate Goals (2018)
- Short Term Goals (2019 – 2021)
- Mid Term Goals (2022 – 2025)
- Long Term Development Goals (Post 2025)

This will include new charts, graphs, maps, and other data as needed to support the plan and its presentation to the appropriate audiences.

OPERATING AND FUNDING RECOMMENDATIONS

OPERATIONS AND FUNDING			
Strategies	Primary Responsibility/ Support	Resource Impact/ Budget Requirement	Timeframe to Complete
1.1: Continue to pursue strategies that move towards consolidating resources identified in the Regional Parks, Trails, and Recreation District Feasibility Study.	Parks and Recreation Director	O&M-Staff Time	Long-Term
1.2: Continue to evaluate and implement Cost Recovery policy and the need to increase program and services fees.	Director/ Rec Manager/ Parks Superintendent	O&M-Staff Time	Short-Term
1.3: Communicate the cost of doing business and price programs and services accordingly.	Director/ Marketing team/ Park Board	O&M-Staff Time	Immediate
1.4: Pursue alternative funding sources identified in the funding exercise.	Director	O&M-Staff Time	Short-Term
1.5: Create a full-time joint staff members.	Director	O&M-\$25,000	Immediate
1.6: Evaluate and strengthen partnership agreements with other agencies.	Director/Rec Manager/Parks Superintendent	O&M-Staff Time	Short-Term
1.7: Develop sponsorship policy and opportunities.	Director/Rec Manager	O&M-Staff Time	Short-Term

LEVEL OF SERVICE RECOMMENDATIONS

LEVEL OF SERVICE			
Strategies	Primary Responsibility/ Support	Resource Impact/Budget Requirement	Timeframe to Complete
2.1: Focus short-term strategies toward maintenance of aging or distressed components in the park system.	Park Superintendent	Capital Cost Dependent on Improvements	Short-Term
2.2: Develop way-finding opportunities in parks and online.	Director/ Rec Manager/ Marketing Team	Capital Cost Dependent on Methods Used	Mid-Term
2.3: Partner with other City departments to identify and plan for key barriers of access to parks and recreational components.	Director	O&M-Staff Time	Short-Term
2.4: Evaluate development codes to ensure appropriate growth in the community.	Director	O&M-Staff Time	Mid-Term
2.5: Continue/strengthen partnerships with alternate trail providers and partners including the Regional Trail Steering Committee.	Director	O&M-Staff Time	Short-Term
2.6: Update Open Lands Plan.	Director/Park Superintendent	O&M-\$25,000	Mid-Term

PROGRAMMING RECOMMENDATIONS

PROGRAMMING			
STRATEGIES	Primary Responsibility/ Support	Resource Impact/Budget Requirement	Timeframe to Complete
3.1: Continue to evaluate current offerings for efficiencies, and opportunities to provide more value through programming; including increased user fees.	Rec Manager/ Director/ Park Board	O&M-Staff Time	Short-Term
3.2: Develop more organized volunteer programs.	Rec Manager	O&M-Staff Time	Short-Term
3.3: Continue to evaluate and strengthen strategic partnerships with alternate providers.	Director/ Rec Manager	O&M-Staff Time	Short-Term
3.4: Support the efforts of the collaborative YMCA/HRSA indoor facility project at the best new location.	Director/ Park Board	O&M-Staff Time	Mid-Term

MARKETING/COMMUNICATIONS/SERVICE DELIVERY RECOMMENDATIONS

MARKETING/COMMUNICATIONS/SERVICE DELIVERY			
STRATEGIES	Primary Responsibility/ Support	Resource Impact/Budget Requirement	Timeframe to Complete
4.1: Develop a 2-5 year strategic marketing plan.	Director/ Marketing team	O&M-Staff Time	Immediate
4.2: Provide additional marketing resources.	Marketing team	O&M-Cost Dependent on Methods Used	Short-Term
4.3: Provide more communication about partners and programs.	Rec Manager/ Marketing team	O&M-Staff Time	Short-Term
4.4: Continue to establish platforms for outreach/ feedback.	Marketing team	O&M-Staff Time	Immediate
4.5: Continue to develop multi-cultural, art, or historical opportunities.	Director/ Rec Manager/ Marketing team	O&M-Staff Time	Short-term

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APPENDIX A: DEMOGRAPHICS REPORT

A. DEMOGRAPHIC PROFILE

By analyzing population data, trends emerge that can inform decision-making and resource allocation strategies for the provision of parks, recreation, and open space management. Key community characteristics were analyzed to identify current demographic statistics and trends that can impact the planning and provision of services. The following section contains the most relevant demographics to create a community profile.

CITY OF HELENA 2018 DATA

POPULATION: 30,147

ANNUAL GROWTH RATE: 0.8%

HOUSEHOLDS IN POVERTY: 14.1%

MED. HOUSEHOLD INCOME: \$54,611

MEDIAN AGE: 42

LEWIS & CLARK COUNTY 2018 DATA

POPULATION: 68,910

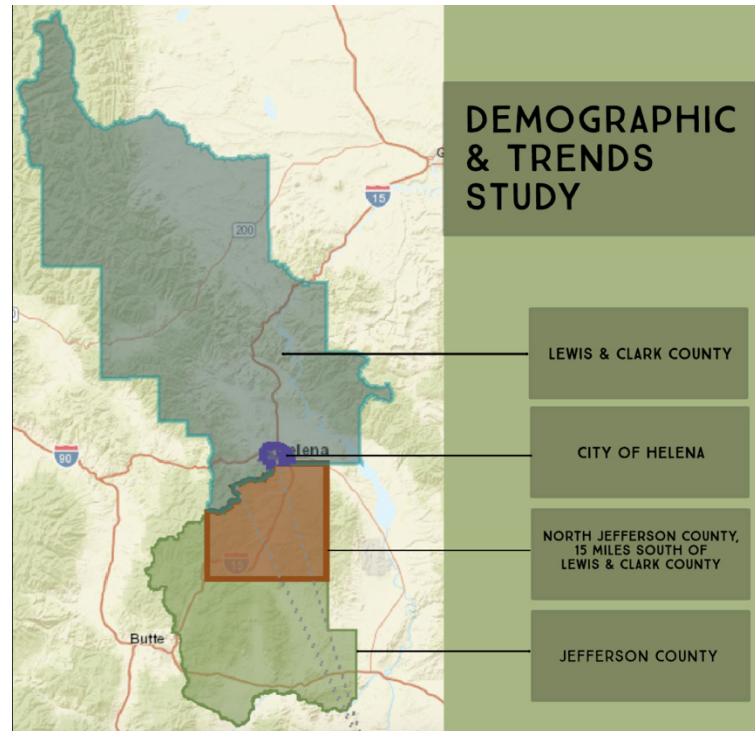
ANNUAL GROWTH RATE: 1.04%

HOUSEHOLDS IN POVERTY: 11.28%

MED. HOUSEHOLD INCOME: \$58,898

MEDIAN AGE: 42.5

Figure 30: Demographic Map and Overview of Study Areas



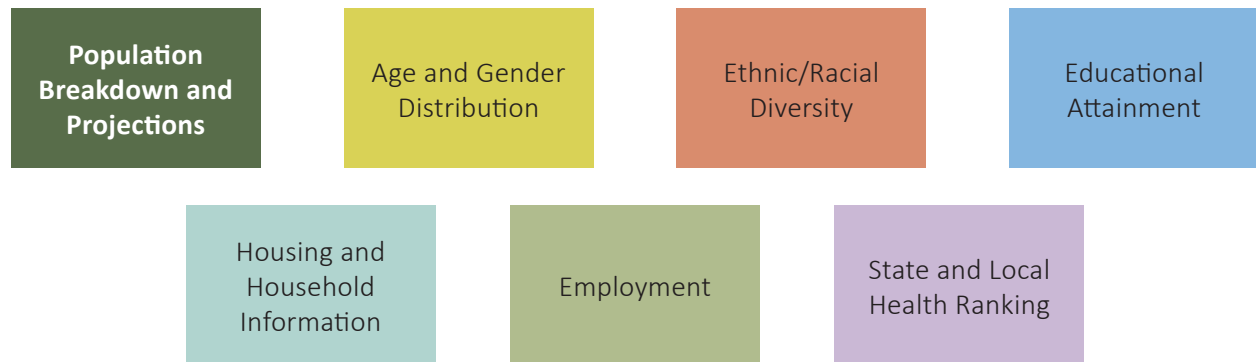
City of Helena
Area: 16.39 mi²



Lewis and Clark County
Area: 3,498 mi²

Source: Esri Business Analyst; Image: Google Maps, June 2018

This demographic profile was compiled in June 2018 from a combination of sources including the ESRI Business Analyst and 2010 U.S. Census. The following topics will be covered in detail in this report:

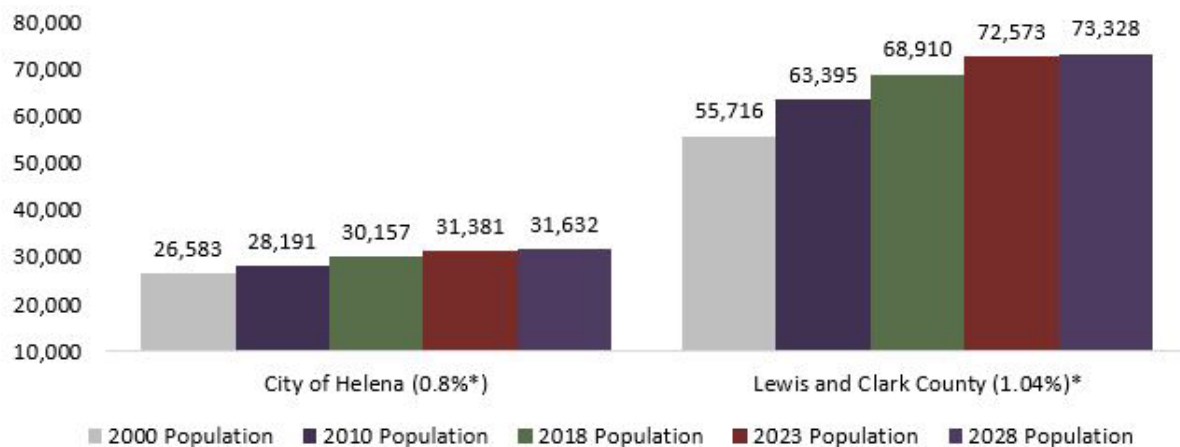


Population Projections

Figure 31 contains actual population figures based on the 2000 and 2010 U.S. Census, in addition to estimates of 2018 and 2022 population by ESRI Business Analyst. Using the average annual growth rates between 2018 and 2023, projections were calculated for 5 and 10 year increments until 2028.

Lewis and Clark County is expected experience over one percent average annual growth from 2018 to 2023; projections estimate that the population will reach over 70,000 in the next five years. The City of Helena will also grow, slightly more slowly, to just over 31,000 in 2023.

Figure 31: City and County Population Growth Trend



Source: U.S. Census Bureau and Esri Business Analyst Population Projections

*2018 – 2028 growth rate

Population Age & Gender Distribution

The City of Helena has roughly 1,000 more females (51.8%) than men (48.1%), while Lewis and Clark County is nearly balanced at 49.3% and 50.6%. The existing and projected population of different age groups, or cohorts, is illustrated in the following series of figures. As demonstrated in **Figure 32**, the city and county have very different age distributions. Knowing this can help inform in planning recreational activities for specific age groups.



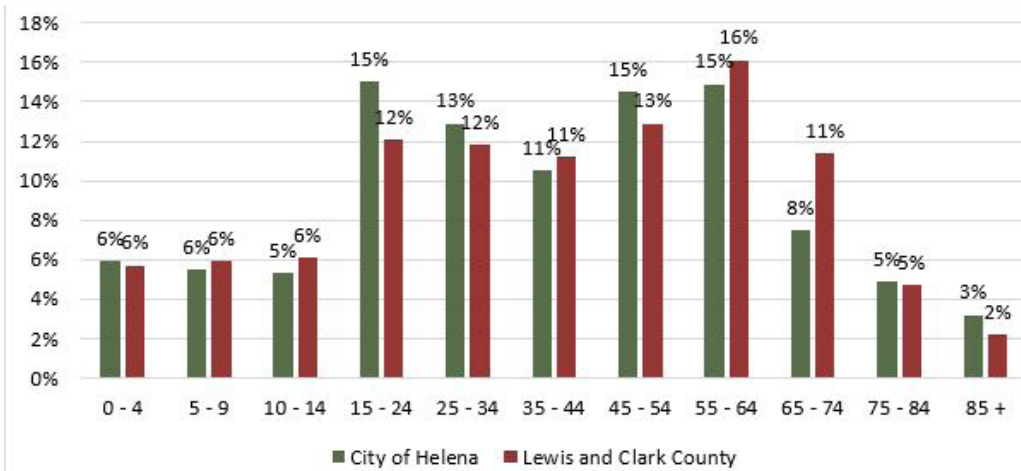
The median age between the two areas is very similar; 42.5 years is the median age in Lewis and Clark County and 42 years in the City of Helena. The major differences between the City of Helena and Lewis and Clark County is the distribution between ages 15 and 54. The City of Helena has the majority of its residents in this category (69%). Lewis and Clark County has 21.5 percent of persons under 18 years old, and over 16 percent just in the 55 to 64 age cohort.

Percent of
Persons
Under 18
Years Old

City of Helena
17.9%

Lewis and Clark County
21.5%

Figure 32: 2018 Estimated Population by Age Cohort



Source: Esri Business Analyst

Race/Ethnicity

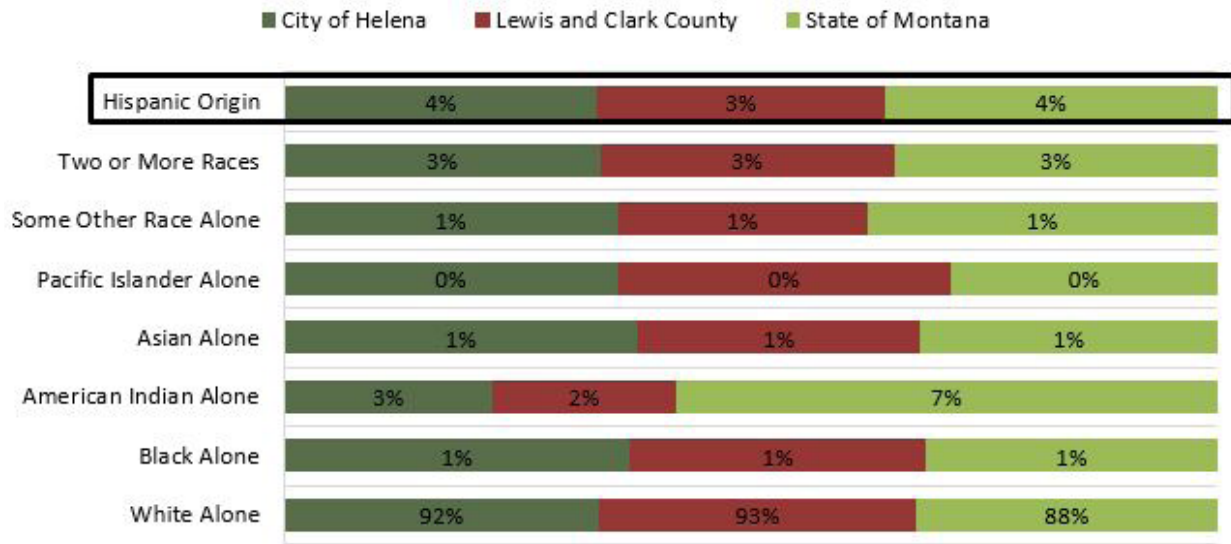
Prior to reviewing demographic data pertaining to a population's racial and ethnic character, it is important to note how the U.S. Census classifies and counts individuals who identify as Hispanic. The Census notes that Hispanic origin can be viewed as the heritage, nationality, lineage, or country of birth of the person or the person's parents or ancestors before arrival in the United States. In the U.S. Census, people who identify as Hispanic, Latino, or Spanish may be any race and are included in all of the race categories. All race categories add up to 100 percent of the population. The indication of Hispanic origin is a different view of the population and is not considered a race. **Figure 33** reflects the approximate racial/ethnic population distribution for the City and County based on the 2018 estimates from the U.S. Census. **Figure 34** shows the projected changes expected in the next five years.



Overall, the state of Montana is more diverse than the City of Helena and Lewis and Clark County. American Indian is the largest minority group in the state at 7 percent, while residents identifying as two or more races also made up about 3 percent of three of the areas.

The demographic composition of all three locations is becoming more diverse over time. It is predicted that in 2023, those identifying as “White Alone” will decrease about one percent in both the city and county. Those identifying as having Hispanic Origin is expected to increase by about one percent in the next five years in both areas.

Figure 33: City, County, and State Comparison of Racial and Ethnic Character



Source: Esri Business Analyst

Figure 34: Projected Demographic Changes from 2018 to 2023



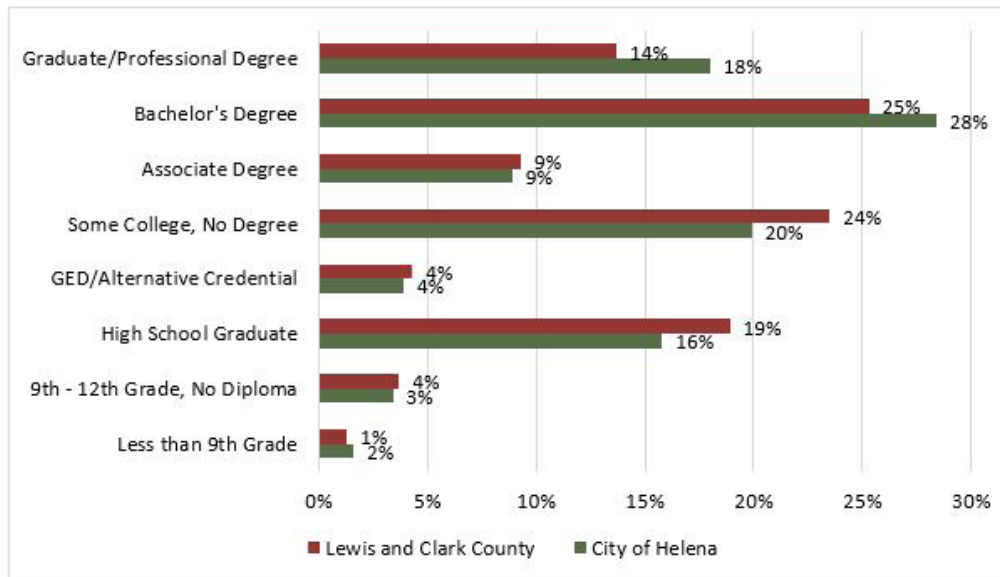
Educational Attainment

According to a Census study, education levels had more effect on earnings over a 40-year span in the workforce than any other demographic factor, such as gender, race, and ethnic origin.¹ The educational attainment for City and County residents over the age of 25 was measured, as illustrated in **Figure 35**.



The most common educational attainment for both locations was a Bachelor's degree. Nearly a quarter of Lewis and Clark County's residents had attended some college, but not received a degree. Both the city and the county, 95 percent of residents have obtained at least a high school diploma.

Figure 35: 2018 Educational Attainment of City and County Adults (ages 25+)



Source: Esri Business Analyst

Household Information

Data regarding the households, housing value, and median income was measured using ESRI Business Analyst and American Community Survey. **Table 6** breaks down the data by occupied housing units, the number of housing units, and the number of households.

¹ Tiffany Julian and Robert Kominski, "Education and Synthetic Work-Life Earnings Estimates" American Community Survey Reports, US Census Bureau, <http://www.Census.gov/prosd/2011pubs/acs-14.pdf>, September 2011.



Lewis and Clark County has about twice as many housing unit and households as the City of Helena, and a slightly higher average household size. The Owner Occupied rate is much higher in the county (57.3%) than the City (48%). The home value in Lewis and Clark County is slightly higher than the City of Helena.

Median Value of
Owner Occupied
Housing Units (2012
– 2016)

City of Helena
\$209,500

Lewis and Clark County
\$212,600

Table 6: 2018 City and County Housing Profile

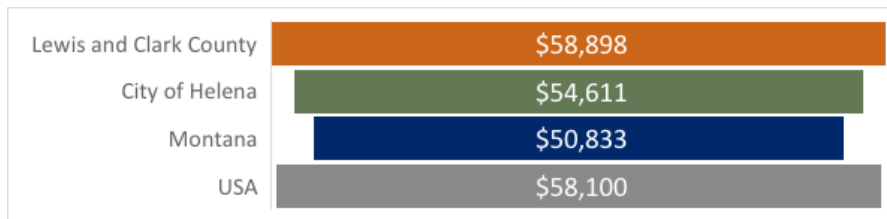
	City of Helena	Lewis and Clark County
Total Housing Units	14,423	32,925
Number of Households	13,655	28,990
Average Household Size	2.09	2.31
Owner Occupied Housing Units	48.0%	57.3%
Renter Occupied Housing Units	46.7%	30.8%
Vacant Housing Units	5.3%	12.0%

Source: Esri Business Analyst

Median Household Income

The most current data from the U.S. Census Bureau and the American Community Survey, illustrated in **Figure 36**, indicates that the median household income in the City and County was higher than that of the Montana, and about average with the median household income of the United States.

Figure 36: Median Household Income



Source: Esri Business Analyst

Employment

The majority of working residents (age 16+) in City and County were employed in jobs in the service industry (56.2%) as illustrated in **Figure 37**. It is estimated that public administration employed nearly a fifth of the residents in both locations, while retail trade also employed a significant portion of the population.



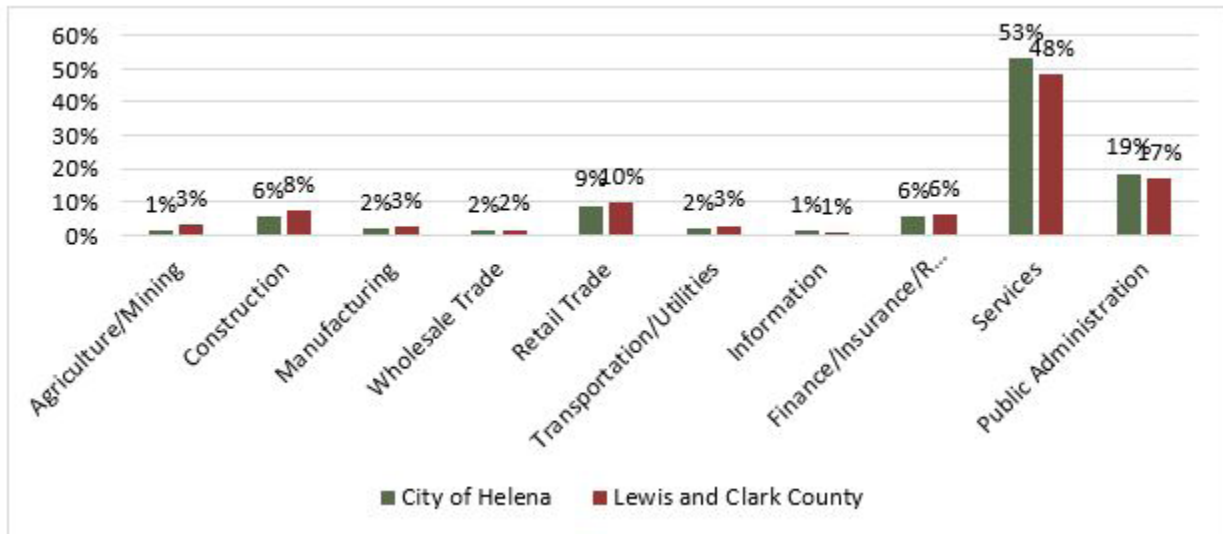
Both the city and county had between 63 and 66 percent of their population in the labor force, and both had similar workforce trends. The City of Helena has a higher percentage of residents in poverty than the county.

Residents
in poverty
(2012 to
2016)

City of Helena
16.5%

Lewis and Clark County
10.4%

Figure 37: 2018 Employment by Industry in City and County



Source: Esri Business Analyst

Health Ranking

Understanding the status of the community’s health can help inform policies related to recreation and fitness. For instance, learning that 11 percent of the City of Helena lives with a disability may help justify the need for adaptive programming in recreation, or additional accessibility in facilities and playgrounds. The American Community Survey attempts to capture six elements of a disability: hearing, vision, cognitive, ambulatory, self-care, and independent living.

CITY OF HELENA

11% with a Disability*

9.4% without health insurance*

*Under 65 Years Old

LEWIS AND CLARK COUNTY

10.2% with a Disability*

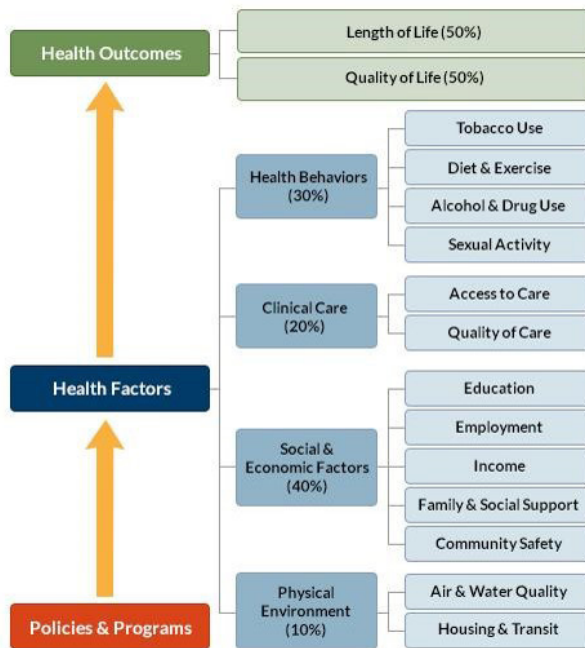
7.6% without health insurance*

*Under 65 Years Old

County Health Ranking

Robert Wood Johnson Foundation’s “County Health Rankings and Roadmaps” provide annual insight into the general health of national, state, and county populations. The 2018 rankings model shown in **Figure 38** highlights the topic areas reviewed by the Foundation. The health ranking for Lewis and Clark County gaged the public health of the population based on “how long people live and how healthy people feel while alive,” coupled with ranking factors including healthy behaviors, clinical care, social and economic, and physical environment factors.²

Figure 38: County Health Ranking



Out of the 47 Montana counties reviewed, Lewis and Clark was ranked as 7th for overall health outcomes, and 3^d for health factors.

State Health Ranking

In 2018, the United Health Foundation’s “America’s Health Rankings Annual Report” ranked Montana as the 22nd healthiest state nationally. The health rankings consider and weigh social and environmental factors that tend to directly impact the overall health of state populations. As illustrated in **Figure 39**.

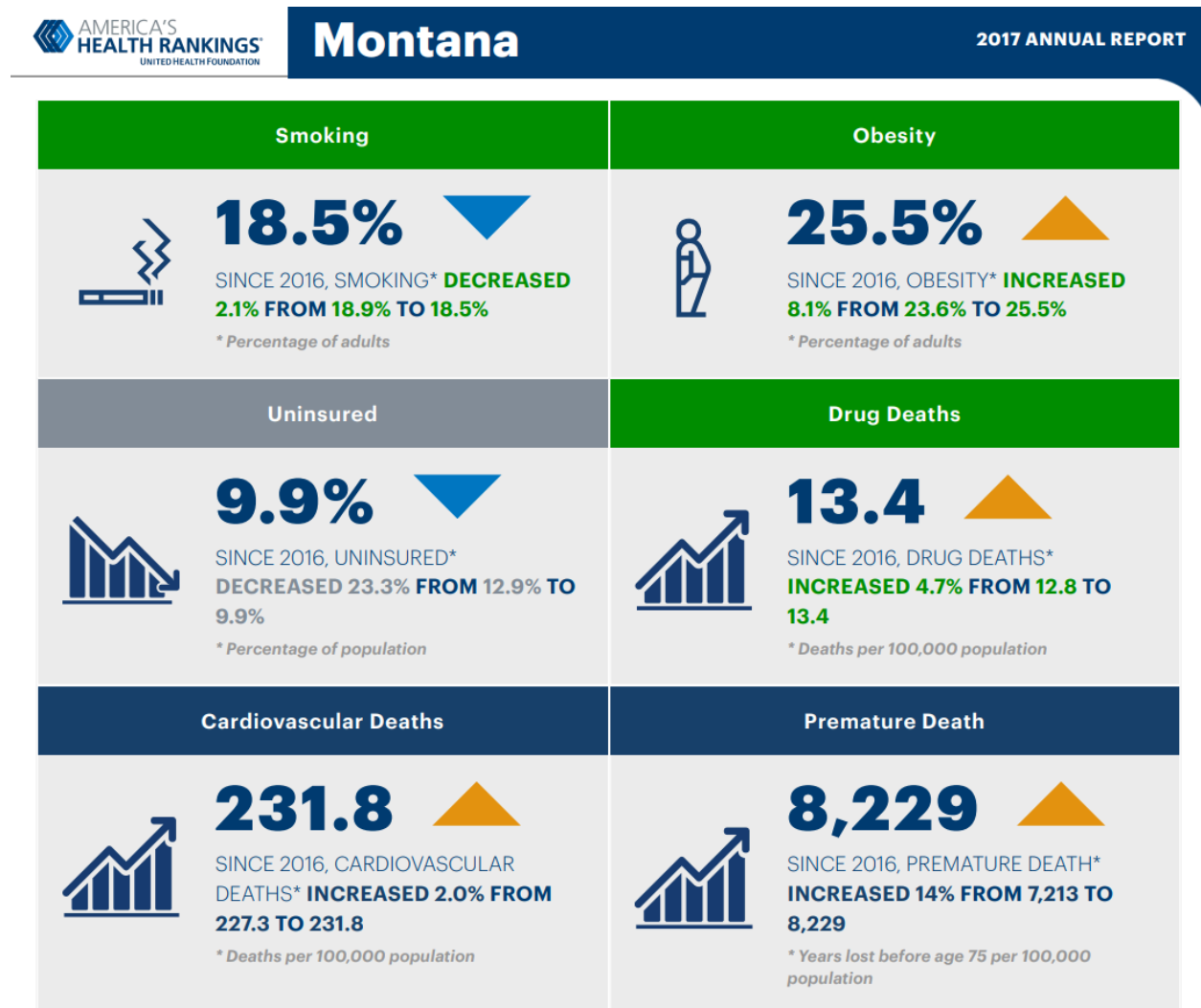
Source: Robert Wood Johnson Foundation

- Montana’s public health ranking strengths include:**
- Low levels of air pollution
 - Low prevalence of obesity
 - Low prevalence of diabetes

- Challenges to Montana’s health include:**
- Low immunization coverage among children
 - Lower number of primary care physicians
 - High prevalence of excessive drinking

² University of Wisconsin Population Health Institute & Robert Wood Johnson Foundation, City Health Rankings 2018, <http://www.Cityhealthrankings.org>

Figure 39: 2018 Montana Health Ranking Overview



Source: [United Health Foundation's America's Health Rankings Annual Report 2018](#)

A Look at North Jefferson County

A final comparison report was requested for Northern Jefferson County. The chart is below with basic demographic information in **Table 6**. Using the boundary of Lewis and Clark County, and measuring 15 miles south, this portion of Northern Jefferson County was a total 545.41 Square Miles.

Table 7: Demographic Comparison

Variable	Lewis and Clark County	Northern Jefferson County	Helena City
2018 Total Population	68,910	7,942	30,157
2018-2023 Population: Annual Growth Rate	1.04%	0.70%	0.80%
2018 Median Household Income	\$58,898	\$83,085	\$54,611
2018 Median Home Value	\$227,852	\$292,241	\$222,563
2018 Total Housing Units	32,925	3,283	14,423
2018 Owner Occupied Housing Units	18,854	2,585	6,917
2018 Renter Occupied Housing Units	10,136	440	6,738
2018 Vacant Housing Units	3,935	257	768
2018 Median Age	42.5	47.5	42.0

APPENDIX B: PARTNERSHIP/ SPONSORSHIP TEMPLATE

Administrative Partnership Policy and Proposal Format

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I. Proposed Parks Department Administrative Partnership Policy

A. Purpose

This administrative policy is designed to guide the process for the City of Helena Parks and Recreation Department (the Department) in its desire to partner with private, non-profit, or other governmental entities for the development, design, construction, and operation of recreational facilities and/or programs that may occur on City property.

The Department desires to identify for-profit, non-profit, and governmental entities that are interested in proposing to partner with the City to maintain, improve, and/or develop recreational facilities and/or programs. A major component in exploring any potential partnership will be to identify additional collaborating partners that may help provide a synergistic working relationship in terms of resources, contributions, knowledge, and political sensitivity. These partnerships should be mutually beneficial for all proposing partners including the City, and particularly beneficial for the residents of the community.

This policy document is designed to:

- Provide essential background information.
- Provide parameters for gathering information regarding the needs and contributions of potential partners.
- Identify how the partnerships will benefit the Department and the community.

Part Two: The “Proposed Partnership Outline Format,” provides a format that is intended to help guide Proposing Partners in creating a proposal for review by Department staff.

B. Background and Assumptions

Partnerships are being used across the nation by governmental agencies in order to utilize additional resources for their community's benefit. Examples of partnerships abound, and encompass a broad spectrum of agreements and implementation. Partnerships occur between public entities and private, for-profit, non-profit organizations and/or other governmental agencies.

Note on Privatization:

This application is specific for proposed partnering for facilities or programs.
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This information does not intend to address the issue of privatization, or transferring existing City functions to a non- City entity for improved efficiency and/or competitive cost concerns. An example of privatization would be a contract for a landscaping company to provide mowing services in a park. The City is always open to suggestions for improving services and cost savings through contractual arrangements. Ideas for privatization of current City functions should be outlined in a letter for the Department's consideration.

- In order for partnerships to be successful, research has shown that the following elements should be in place prior to partnership procurement:
- There must be support for the concept and process of partnering from the very highest organizational level – i.e.: City Commissioners Council, City Managers, Parks and Recreation Director, other department heads, etc.
- The most successful agencies have high-ranking officials that believe that they owe it to their residents to explore partnering opportunities whenever presented; those communities both solicit partners and consider partnering requests brought to them.
- It is very important to have a Partnership Policy in place before partner procurement begins. This allows the agency to be proactive rather than reactive when presented with a partnership opportunity. It also sets a “level playing field” for all potential partners, so that they know and understand in advance the parameters and selection criteria for a proposed partnership.
- A partnership policy and process should set priorities and incorporate multiple points for go/no-go decisions.
- The partnership creation process should be a public process, with both Partners and the Partnering Agency well aware in advance, of the upcoming steps.

C. Partnership Definition

- For purposes of this document and policy, a Proposed Partnership is defined as:
- **“An identified idea or concept involving City of Helena Parks and Recreation and for-profit, non-profit, and/or governmental entities, outlining the application of combined resources to maintain, improve, and/or develop facilities, programs, and/or amenities for the City and their residents.”**

A partnership is a cooperative venture between two or more parties with a common goal, who combine complementary resources to establish a mutual direction or complete a mutually beneficial project. Partnerships can be facility-based or program-specific. The main goal for the Department’s partnerships is enhancing public offerings to meet the mission and goals of the City. The Department is interested in promoting partnerships which involve cooperation among many partners, bringing resources together to accomplish goals in a synergistic manner. Proposals that incorporate such collaborative efforts will receive priority status.

Partnerships can accomplish tasks with limited resources, respond to compelling issues, encourage cooperative interaction and conflict resolution, involve outside interests, and serve as an education and outreach tool. Partnerships broaden ownership in various projects and increase public support for recreation goals. Partners often have flexibility to obtain and invest resources/dollars on products or activities where local government may be limited.

Partnerships can take the form of (1) cash gifts and donor programs, (2) improved access to alternative funding, (3) property investments, (4) charitable trust funds, (5) labor, (6) materials, (7) equipment, (8) sponsorships, (9) technical skills and/or management skills, and other forms of value. The effective use of volunteers can also figure significantly into developing partnerships. Some partnerships involve active decision making, while in others, certain partners take a more passive role. The following schematic shows the types of possible partnerships discussed in this policy:



D. Possible Types of Active Partnerships

The Department is interested in promoting collaborative partnerships among multiple organizations. Types of agreements for proposed “Active” Partnerships may include leases, contracts, sponsorship agreements, marketing agreements, management agreements, joint-use agreements, inter-governmental agreements, or a combination of these. An innovative and mutually beneficial partnership that does not fit into any of the following categories may also be considered.

The following examples are provided only to illustrate possible types of partnerships. They are not necessarily examples that would be approved and/or implemented.

Proposed partnerships may be considered for facility, service, operations, and/or program maintenance, improvement and/or development including associated needs such as parking, paving, fencing, drainage systems, signage, outdoor restrooms, lighting, utility infrastructure, etc.

Examples of Public/Private Partnerships

- A private business seeing the need for more/different fitness and wellness activities for the public wants to negotiate a management contract, provide the needed programs, and make a profit.
- A private group interested in environmental conservation obtains a grant from a foundation to build an educational kiosk, providing all materials and labor, and is in need of a spot to place it.
- Several neighboring businesses see the need for a place for their employees to exercise during the work day. They group together to fund initial facilities and an operating subsidy and give the facility to the Department to operate for additional public users.
- A biking club wants to fund the building of a race course through a park. The races would be held one night per week, but otherwise the path would be open for public biking and in-line skating.
- A large corporate community relations office wants to provide a skate park, but doesn't want to run it. They give a check to the City in exchange for publicizing their underwriting of the park's cost.
- A private restaurant operator sees the need for a concessions stand in a park and funds the building, or temporary installation, of one, operates it, and provides a share of revenue back to the City.
- A garden club wants land to build unique butterfly gardens. They will tend the gardens and just need a location and irrigation water.

Examples of Public/Non-Profit Partnerships

- A group of participants for a particular sport or hobby sees a need for more playing space and forms a non-profit entity to raise funds for a facility for their priority use that is open to the public during other hours.
- A non-profit baseball association needs fields for programs and wants to obtain grants for the building of the fields. They would get priority use of the fields, which would be open for the Department to schedule use during other times.
- An organization funds a new building, dedicating some space and time for public or civic meetings and receiving use of the building for a limited time commensurate with the capital investment.

Examples of Public/Public Partnerships

- Two governmental entities contribute financially to the improvement or development and construction of a recreational facility to serve residents of both entities. One entity, through an IGA, is responsible for the operation of the facility, while the other entity contributes operating dollars through a formula based on population or some other appropriate factor.
- Two governmental public safety agencies see the need for more physical training space for their employees. They jointly build a gym adjacent to City facilities to share for their training during the day. The gyms would be open for the Department to schedule for other users at night.
- A school district sees the need for a climbing wall for its athletes. The district funds the wall and subsidizes operating costs, and the Department manages and maintains the wall to provide public use during non-school hours.
- A university needs meeting rooms. They fund a multi-use building on City land that can be used for Department programs at night.

E. Sponsorships

The Department is interested in actively procuring sponsorships for facilities and programs as one type of beneficial partnership. Refer to the Department administrative ***Sponsorship Policy*** for more information.

F. Limited Decision-Making Partnerships: Donor, Volunteer, and Granting Programs

While this policy document focuses on the parameters for more active types of partnerships, the Department is interested in, and will be happy to discuss, a proposal for any of these types of partnerships, and may create specific plans for such in the future.

G. Benefits of Partnerships with City of Helena Parks and Recreation

The Department expects that any proposed partnership will have benefits for all involved parties. Some general expected benefits are:

Benefits for the City and their residents:

- Merging of resources to create a higher level of service and facility availability for residents.
- Making alternative funding sources available for public amenities.
- Tapping into the dynamic and entrepreneurial traits of private industry.
- Delivering services and facilities more efficiently by allowing for collaborative business solutions to public organizational challenges.
- Meeting the needs of specific groups of users through the availability of land for recreational, habitat improvement, and resident use.

Benefits for the Partners:

- Land and/or facility availability at a subsidized level for specific facility and/or program needs.
- Sharing of the risk with an established stable governmental entity.
- Becoming part of a larger network of support for management and promotion of facilities and programs.
- Availability of professional Department recreation and planning experts to maximize development of the facilities and programs that may result.
- Streamlining of the planning and operational efforts.

II. The Partnering Process

- **The steps for creation of a partnership with City of Helena Parks and Recreation are as follows:**
 - A. City of Helena Parks and Recreation will create a public notification process that will help inform any and all interested potential partners or parties of the availability of partnerships with the City. This may be done through notification in area newspapers, listing in the brochure, or through any other feasible notification method.
 - B. The proposing partner takes the first step to propose partnering with the Department. To help in reviewing both the partnership proposed, and the project to be developed in partnership, the Department asks for a **Preliminary Proposal** according to a specific format as outlined in *Part Two - Proposed Partnership Outline Format*.
 - C. If initial review of a Preliminary Proposal yields interest and appears to be mutually beneficial based on the Department’s Mission and Goals, and the Selection Criteria, a Department staff member or appointed representative will be assigned to work with potential partners.
 - D. A Department representative is available to answer questions related to the creation of an initial proposal, and after initial interest has been indicated, will work with the proposing partner to create a checklist of what actions need to take place. Each project will have distinctive planning, design, review, and support issues. The Department representative will facilitate the process of determining how the partnership will address these issues. This representative can also facilitate approvals and input from any involved City departments, providing guidance for the partners as to necessary steps.
 - E. An additional focus at this point will be determining whether the project is appropriate for additional collaborative partnering, and whether this project should prompt the Department to seek a **Request for Proposal (RFP)** from competing/collaborating organizations.

Request for Proposal (RFP) Trigger: In order to reduce concerns of unfair private competition, if a proposed project involves partnering with a private “for-profit” entity, and the Department has not already undergone a public process for solicitation of that particular type of partnership, the Department will request Partnership Proposals from other interested private entities for identical and/or complementary facilities, programs, or services. A selection of appropriate partners will be part of the process.

- F. For most projects, a **Formal Proposal** from the partners for their desired maintenance, improvement, and/or development project will need to be presented for the City’s official development review processes and approvals. The project may require approval by the Legal, Planning, Public Works, Budget, and/or other City Departments, and/or Review Committees, depending on project complexity and applicable Charter and municipal provisions, requirements, ordinances, or regulations. If these reviews are necessary,

provision to reimburse the City for costs incurred in having a representative facilitate the partnered project's passage through development review should be included in the partnership proposal.

- G. Depending on project complexity and anticipated benefits, responsibilities for all action points are negotiable, within the framework established by law, to ensure the most efficient and mutually beneficial outcome. Some projects may require that all technical and professional expertise and staff resources come from outside the City 's staff, while some projects may proceed most efficiently if the City contributes staff resources to the partnership.
- H. The partnership must cover the costs the partnership incurs, regardless of how the partnered project is staffed, and reflect those costs in its project proposal and budget. The proposal for the partnered project should also discuss how staffing and expertise will be provided, and what documents will be produced. If City staff resources are to be used by the partnership, those costs should be allocated to the partnered project and charged to it.
- I. Specific **Partnership Agreements** appropriate to the project will be drafted jointly. There is no specifically prescribed format for **Partnership Agreements**, which may take any of several forms depending on what will accomplish the desired relationships among partners. The agreements may be in the form of:
 - Lease Agreements
 - Management and/or Operating Agreements
 - Maintenance Agreements
 - Intergovernmental Agreements (IGAs)
 - Or a combination of these and/or other appropriate agreements

Proposed partnership agreements might include oversight of the development of the partnership, concept plans and project master plans, environmental assessments, architectural designs, development and design review, project management, and construction documents, inspections, contracting, monitoring, etc. Provision to fund the costs and for reimbursing the City for their costs incurred in creating the partnership, facilitating the project's passage through the development review processes, and completing the required documents should be considered.

- J. During the term of any partnership agreement/contract, the partner will agree to procure and maintain insurance coverage naming the City as additional insured: Commercial General Liability with a minimum combined single limit of bodily injury and property damage of \$1,000,000 per occurrence and general aggregate of \$2,000,000. The partner shall provide a Certificate of Insurance as evidence of such coverage(s) on a standard insurance certificate or its equivalent.

- K. INDEMNIFICATION: To the extent permitted by law, the partner will covenant to save, defend, hold harmless, and indemnify the City, and all of their officers, officials, departments, agencies, agents, and employees (collectively, the “City”) from and against any and all claims, losses, damages, injuries, fines, penalties, costs (including court costs and attorney’s fees), charges, liability, or exposure, however caused, resulting from, arising out of, or in any way connected with partner or its agents or invitees acts or omissions in performance or nonperformance of its obligations under the Agreement or use of the City facilities as contemplated in the partnership.

- L. If all is approved, the Partnership begins. The Department is committed to upholding its responsibilities to Partners from the initiation through the continuation of a partnership. Evaluation will be an integral component of all Partnerships. The agreements should outline who is responsible for evaluation and what types of specific measures will be used, and should detail what will occur should the evaluations reveal Partners are not meeting their Partnership obligations.

III. The Partnership Evaluation Process

A. Mission Statements and Goals

All partnerships with City of Helena Parks and Recreation should be in accord with the Department’s Mission and Goals to indicate how a proposed partnership for the Department would be preliminarily evaluated.

(Insert City Mission, if applicable.)

B. Other Considerations

1. Costs for the Proposal Approval Process

- For most proposed partnerships, there will be considerable staff time spent on the review and approval process once a project passes the initial review stage. This time includes discussions with Proposing Partners, exploration of synergistic partnering opportunities, possible RFP processes, facilitation of the approval process, and assistance in writing and negotiating agreements, contracting, etc. There may also be costs for construction and planning documents, design work, and related needs and development review processes mandated by City requirements.

Successful Partnerships will take these costs into account and may plan for City recovery of some or all of these costs within the proposal framework. Some of these costs could be considered as construction expenses, reimbursed through a negotiated agreement once operations begin, or covered through some other creative means.

2. Land Use and/or Site Improvements

- Some proposed partnerships may include facility and/or land use. Necessary site improvements cannot be automatically assumed. Costs and responsibility for these improvements should be considered in any Proposal. Some of the general and usual needs for public facilities that may not be included as City contributions and may need to be negotiated for a project include:

<ul style="list-style-type: none">▪ Facility or non-existent infrastructure construction▪ Road, street, bike path and walkway improvements▪ Maintenance to specified standards▪ Staffing▪ Parking▪ Snow removal▪ Lighting	<ul style="list-style-type: none">▪ Outdoor restrooms▪ Water fountains▪ Complementary uses of the site▪ Utility improvements (phone, cable, storm drainage, electricity, water, gas, sewer, etc.)▪ Custodial services▪ Trash removal
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3. Need

The nature of provision of public services determines that certain activities will have a higher need than others. Some activities serve a relatively small number of users and have a high facility cost. Others serve a large number of users and are widely available from the private sector because they are profitable. The determination of need for facilities and programs is an ongoing discussion in public provision of programs and amenities. The project will be evaluated based on how the project fulfills a public need.

4. Funding

Only when a Partnership Proposal demonstrates high unmet needs and high benefits for city residents, will the Department consider contributing resources to a project. The Department recommends that Proposing Partners consider sources of potential funding. The more successful partnerships will have funding secured in advance. In most cases, Proposing Partners should consider funding and cash flow for initial capital development, staffing, and ongoing operation and maintenance.

The details of approved and pending funding sources should be clearly identified in a proposal.

For many partners, especially small private user groups, non-profit groups, and governmental agencies, cash resources may be a limiting factor in the proposal. It may be a necessity for partners to utilize alternative funding sources for resources to complete a proposed project. Obtaining alternative funding often demands creativity, ingenuity, and persistence, but many forms of funding are available.

Alternative funding can come from many sources, e.g. Sponsorships, Grants, and Donor Programs. A local librarian and/or internet searches can help with foundation and grant resources. Developing a solid leadership team for a partnering organization will help find funding sources. In-kind contributions can, in some cases, add additional funding.

All plans for using alternative funding should be clearly identified. The Department has an established Sponsorship Policy, and partnered projects will be expected to adhere to the Policy. This includes the necessity of having an Approved Sponsorship Plan in place prior to procurement of sponsorships for a Partnered Project.

C. Selection Criteria

In assessing a partnership opportunity to provide facilities and services, the Department will consider (as appropriate) the following criteria. The Proposed Partnership Outline Format in Part Two provides a structure to use in creating a proposal. Department staff and representatives will make an evaluation by attempting to answer each of the following Guiding Questions.

- How does the project align with the Department's Mission Statement and Goals?
- How does the proposed facility fit into the current Department's Master Plan?
- How does the facility/program meet the needs of city residents?
- How will the project generate more revenue and/or less cost per participant than the

- Department can provide with its own staff or facilities?
- What are the alternatives that currently exist, or have been considered, to serve the users identified in this project?
- How much of the existing need is now being met within the city borders and within municipalities within the City jurisdiction?
- What is the number and demographic profile of participants who will be served?
- How can the proposing partner assure the City of the long-term stability of the proposed partnership, both for operations and for maintenance standards?
- How will the partnered project meet the Americans with Disabilities Act (ADA) and Equal Employment Opportunity Commission (EEOC) requirements?
- How will the partnered project assure compliance with all City policies and requirements?
- How will the organization offer programs at reasonable and competitive fees for participants?
- What are the overall benefits for both the City and the Proposing Partners?
- What are potential impacts to city residents and existing uses or facilities? How will these be mitigated? The Department will make the final determination as to impact.

D. Additional Assistance

The Department is aware that the partnership process entails a great deal of background work on the part of the Proposing Partner. The following list of resources may be helpful in preparing a proposal:

- **Courses are available through local colleges and universities to help organizations develop a business plan and/or operational pro-formas.**
- The Chambers of Commerce offer a variety of courses and assistance for business owners and for those contemplating starting new ventures.
- There are consultants who specialize in facilitating these types of partnerships. For one example, contact **GreenPlay LLC** at **303-439-8369** or **info@greenplayllc.com**.
- Reference Librarians at libraries and internet searches can be very helpful in identifying possible funding sources and partners, including grants, foundations, financing, etc.
- Relevant information including the 2018 Master Plan, site maps, and other documents are available electronically on the Department's website.
- City of Helena Park and Recreation Web Site, <http://www.helenaparkandrec.org>, has additional information.
- **If additional help or information is needed, please call 406-447-8463.**

Part Two

Sample Proposed Partnership Outline Format

Please provide as much information as possible in the following outline form.

I. Description of Proposing Organization:

- Name of Organization
- Years in Business
- Contact Name, Mailing Address, Physical Address, Phone, Email, Web Site
- Legal and/or IRS Status
- Purpose and Stated Mission of Organization
- Services Provided/Member/User/Customer Profiles
- Accomplishments

II. Summary of Proposal (100 words or less)

III. Decision Making Authority

Who is authorized to negotiate on behalf of the organization? Who or what group (i.e. Council/Commission/Board) is the final decision maker and can authorize the funding commitment? What is the timeframe for decision making?

What is being proposed in terms of capital improvement or development, and program needs?

IV. Benefits to the Partnering Organization

Why is your organization interested in partnering with the Department? Please individually list and discuss the benefits (monetary and non-monetary) for your organization.

V. Benefits to the Teton County/Jackson Parks and Recreation Department

Please individually list and discuss the benefits (monetary and non-monetary) for the Department and residents of the county.

VI. Details (as currently known)

The following page lists a series of *Guiding Questions* to help you address details that can help outline the benefits of a possible partnership. Please try to answer as many as possible with currently known information. Please include what your organization proposes to provide and what is requested of the Department. Please include (as known) initial plans for your concept, operations, projected costs and revenues, staffing, and/or any scheduling or maintenance needs, etc.

Guiding Questions

Meeting the Needs of our Community:

- How does the project align with parks, recreation, and open space goals?
- How does the proposed program or facility meet a need for county residents?
- Who will be the users? What is the projected number and profile of participants who will be served?
- What alternatives currently exist to serve the users identified in this project?
- How much of the existing need is now being met? What is the availability of similar programs elsewhere in the community?
- Do the programs provide opportunities for entry-level, intermediate, and/or expert skill levels?
- How does this project incorporate environmentally sustainable practices?

The Financial Aspect:

- Can the project generate more revenue and/or less cost per participant than the Department can provide with its own staff or facilities? If not, why should the Department partner on this project?
- Will your organization offer programs at reasonable and competitive costs for all participants? What are the anticipated prices for participants?
- What resources are expected to come from the Parks Department?
- Will there be a monetary benefit for the County, and if so, how and how much?

Logistics:

- How much space does your project need? What type of space?
- What is critical related to location?
- What is your proposed timeline?
- What are your projected hours of operations?
- What are your initial staffing projections?
- Are there any mutually-beneficial cooperative marketing benefits?
- How will you meet types of insurance needed and who will be responsible for acquiring and paying premiums on the policies?
- What is your organization's experience in providing this type of facility/program?
- How will your organization meet ADA and EEOC requirements?

Agreements and Evaluation to be discussed with the County:

- How, by whom, and at what intervals should the project be evaluated?
- How can you assure the Department of long-term stability of your organization?
- What types and length of agreements should be used for this project?
- What types of "exit strategies" will be included?
- What should be done if the project does not meet the conditions of the original agreements?

DRAFT

City of Helena Parks and Recreation Department Administrative Sponsorship Policy

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City of Helena and Recreation Department Administrative Sponsorship Policy

Introduction

The following guidelines in this Sponsorship Policy have been specifically designed for the City of Helena and Recreation Department (the Department), while considering that these guidelines may be later adapted and implemented on a City-wide basis. Some assumptions regarding this policy are:

- Partnerships for recreation and parks facilities and program development may be pursued based on the City of Helena Partnership Policy, encouraging the development of partnerships for the benefit of the City, citizens, and potential partners.
- Sponsorships are one type of partnership, and one avenue of procurement for alternative funding resources. The Sponsorship Policy may evolve as the needs of new projects and other City departments are incorporated into its usage.
- Broad guidelines are offered in this policy primarily to delineate which types of sponsors and approval levels are currently acceptable for the Department.
- The policy ensures that the definition of potential sponsors include non-commercial community organizations (for example: YMCAs and Universities), but does not include a forum for non-commercial speech or advertising.
- Sponsorships are clearly defined and are different from advertisements. Advertisements are one type of benefit that may be offered to a sponsor in exchange for cash or in-kind sponsorship.
- The difference between sponsors and donors must be clarified, as these terms are often confused and misused.

Structure

Part A of this document is the **Sponsorship Policy**

Part B is the **Levels of Sponsorship Tiers and Benefits**

Part C provides the vocabulary and **Glossary of Sponsorship Terms**

Part A
City of Helena Parks and Recreation Department
Administrative Sponsorship Policy

I. Purpose

In an effort to utilize and maximize the community’s resources, it is in the best interest of the City of Helena’s Parks and Recreation Department to create and enhance relationship-based sponsorships. This may be accomplished by providing local, regional, and national commercial businesses and non-profit groups a method for becoming involved with the many opportunities provided by the Department. The Department delivers quality, life-enriching activities to the broadest base of the community. This translates into exceptional visibility for sponsors and supporters. It is the goal of the Department to create relationships and partnerships with sponsors for the financial benefit of the Department.

Sponsorships vs. Donations

It is important to note that there is a difference between a sponsorship and a philanthropic donation. Sponsorships are cash or in-kind products and services offered by sponsors with the clear expectation that an obligation is created. The recipient is obliged to return something of value to the sponsor. The value is typically public recognition and publicity or advertising, highlighting the contribution of the sponsor and/or the sponsor’s name, logo, message, products, or services. The Sponsor usually has clear marketing objectives that they are trying to achieve, including but not limited to the ability to drive sales directly based on the sponsorship, and/or quite often, the right to be the exclusive sponsor in a specific category of sales. The arrangement is typically consummated by a letter of agreement or contractual arrangement that details the particulars of the exchange.

In contrast, a donation may or may not have restrictions on how the money or in-kind resources are used. This policy specifically addresses sponsorships, the agreements for the procurement of the resources, and the benefits provided in return for securing those resources. Since donations or gifts come with no restrictions (unless earmarked) or expected benefits for the donor, a policy is generally not needed.

II. Guidelines for Acceptable Sponsorships

Sponsors should be businesses, non-profit groups, or individuals that promote mutually beneficial relationships for the Department. All potentially sponsored properties (facilities, events, or programs) should be reviewed in terms of creating synergistic working relationships with regard to benefits, community contributions, knowledge, and political sensitivity. All sponsored properties should promote the goals and mission of the Department as follows:

<i>(Insert City Mission, if applicable.)</i>

III. Sponsorship Selection Criteria

Relationship of Sponsorship to Mission and Goals

The first major criterion is the appropriate relationship of a sponsorship to the Department's Mission and Goals. While objective analysis is ideal, the appropriateness of a relationship may sometimes be necessarily subjective. This policy addresses this necessity by including approval from various levels of City management staff and elected officials, outlined in **Section B**, to help assist with decisions involving larger amounts and benefits for sponsorship.

The following questions are the major guiding components of this policy and should be addressed prior to soliciting potential sponsors:

- Is the sponsorship reasonably related to the purpose of the facility or programs as exemplified by the Mission Statement and Goals of the Department?
- Will the sponsorship help generate more revenue and/or less cost per participant than the Department can provide without it?
- What are the real costs, including staff time, for procuring the amount of cash or in-kind resources that come with the generation of the sponsorship?

Sponsorships which shall NOT be considered are those which:

- Promote environmental, work, or other practices that, if they took place in the City, would violate U.S. or state law (i.e., dumping of hazardous waste, exploitation of child labor, etc.), or promote drugs, alcohol, or tobacco, or that constitute violations of law.
- Duplicate or mimic the identity or programs of the Department or any of its divisions.
- Exploit participants or staff members of the Department.
- Offer benefits which may violate other accepted policies or any City rules or regulations regarding signage on its properties. (Is there a sign policy or ordinance in City that could be put here?)

Sponsorship Plan and Approval Levels

Each project or program that involves solicitation of Sponsors should, PRIOR to procurement,

create a Sponsorship Plan specific to that project or program that is in line with the Sponsorship Levels given in **Part B**. This plan needs to be approved by the Management Team Members supervising the project and in accordance to City Partnership, Sponsorship, and Sign Code policies. In addition, each sponsorship will need separate approval if they exceed pre-specified limits. The Approval Levels are outlined below:

Under \$1,000	The program or project staff may approve this level of Agreement, with review by their supervising Management Team Member.
\$1,001 to \$10,000	The Agreement needs approval of a Management Team Member.
\$10,001 to \$25,000	The Agreement needs approval of the entire Senior Management Team and Department Director.
Over \$25,000	The Agreement needs approval of the City Commissioners/Supervisors.

No Non-Commercial Forum is Permitted

This criterion deals with the commercial character of a sponsorship message. The Department intends to create a limited forum, focused on advertisements incidental to commercial sponsorships of parks and recreation facilities and programs. While non-commercial community organizations or individuals may wish to sponsor Department activities or facilities for various reasons, no non-commercial speech is permitted in the limited forum created by this policy.

Advertisements incidental to commercial sponsorship must primarily propose a commercial transaction, either directly, through the text, or indirectly, through the association of the sponsor’s name with the commercial transaction of purchasing the commercial goods or services which the sponsor sells.

The reasons for this portion of the Policy include:

- (1) The desirability of avoiding non-commercial proselytizing of a “captive audience” of event spectators and participants.
- (2) The constitutional prohibition on any view-point related decisions about permitted advertising coupled with the danger that the City and Department would be associated with the advertising in any way.
- (3) The desire of the Department to maximize income from sponsorship, weighed against the likelihood that commercial sponsors would be dissuaded from using the same forum commonly used by persons wishing to communicate non-commercial messages, some of which could be offensive to the public.
- (4) The desire of the Department to maintain a position of neutrality on political and religious issues.
- (5) In the case of religious advertising and political advertising, specific concerns about the danger of “excessive entanglement” with religion (and resultant constitutional violations) and the danger of election campaign law violations, respectively.

Guidelines for calculating the **Levels of Sponsorship Tiers and Benefits** are provided and outlined in **Part B**.

IV. Additional Guidelines for Implementation

A. Equitable Offerings

It is important that all sponsorships of equal levels across divisions within the Department yield the same value of benefits for potential sponsors.

Sponsorship Contact Database

A designated staff person or representative of the Department will keep an updated list of all current sponsors, sponsored activities, and contacts related to sponsorship.

Purpose of Maintaining the Database:

- Limit duplicate solicitations of one sponsor.
- Allow management to make decisions based on most appropriate solicitations and levels of benefits offered.
- Keep a current list of all Department supporters and contacts.
- Help provide leads for new sponsorships, if appropriate.

For staff other than the designated staff person, access to the database will be limited to printouts of listings of names of sponsors and their sponsored events. This limited access will provide information to help limit duplicated solicitations, and will also protect existing sponsor relationships, while allowing the evaluation of future sponsorships to occur at a management level.

If a potential sponsor is already listed, staff should not pursue a sponsorship without researching the sponsor's history with the most recently sponsored unit of the City. If more than one unit wishes to pursue sponsorship by the same company, the Department head shall make a decision based on several variables, including but not limited to:

- History of sponsorship, relationships, and types of sponsorship needed.
- Amount of funding available.
- Best use of funding based on departmental priorities.

Sponsorship Committee

A committee consisting of the supervisors of each program using sponsorships and others as deemed appropriate, shall meet annually to review the database, exchange current agreement samples, and recommend adjusting benefit levels and policy as needed, and to review any incoming proposals. Changes shall not take effect before approval by the Department head.

Part B

Levels of Sponsorship Tiers and Benefits

The following tiers are presented as a guideline for types of benefits that may be presented as opportunities for potential sponsors.

Each sponsorship will most likely need to be individually negotiated. One purpose for these guidelines is to create equity in exchanges across sponsorship arrangements. While for the sake of ease the examples given for levels are based on amount of sponsorship requested, the level of approval needed from Department staff is really based on the amount of benefits exchanged for the resources. The levels of approval are necessary because the costs and values for different levels of benefits may vary, depending on the sponsorship. It is important to note that these values may be very different. Sponsors will not typically offer to contribute resources that cost them more than the value of resources that they will gain and, typically, seek at least a 2-1 return on their investment. Likewise, the Department should not pursue sponsorships unless the total value the Department receives is greater than its real costs.

A hierarchy of sponsors for events, programs, or facilities with more than one sponsor is listed below from the highest level to the lowest. Not all Levels will necessarily be used in each Sponsorship Plan. Note that the hierarchy is not dependent on specific levels or amounts of sponsorship. Specific levels and amounts should be designed for each project, event, or asset before sponsorships are procured within the approved Sponsorship Plan. Complete definitions of terms are included in **Part C**.

Hierarchy of Sponsorship Levels (highest to lowest)

Park System-Wide Sponsor ⇨
Facilities/Parks Title or Primary Sponsor ⇨
Event/Program Title or Primary Sponsor ⇨
Presenting Sponsor (Facility, Event, or Program) ⇨
Facility/Park Sponsor ⇨
Program/Event Sponsor ⇨ **Media Sponsor** ⇨ **Official Supplier** ⇨
Co-sponsor

This hierarchy will help decide the amounts to be asked of various sponsors, and will determine what levels of benefits to provide. It is important to build flexibility and choice into each level so that sponsors can have the ability to choose options that will best fit their objectives. Note that the benefits listed under each level are examples of value. The listing does not mean that all of the benefits should be offered. It is a menu of options for possible benefits, depending on the circumstances. These are listed primarily as a guideline for **maximum** benefit values. It is recommended that each project create a project-specific Sponsorship Plan for approval in advance of sponsorship procurement, based on the benefits available and the values specific to the project.

I. Sponsorship Assets and Related Benefits Inventory

TO BE DETERMINED FOR CITY OF HELENA BASED ON OFFERINGS (PROJECTS, EVENTS, ASSETS), VALUATION, AND DETERMINED BENEFITS

A tiered structure of actual values and approval levels should be determined as part of a Sponsorship Plan.

Part C

Glossary of Sponsorship Terms

Activation

The marketing activity a company conducts to promote its sponsorship. Money spent on activation is over and above the rights fee paid to the sponsored property. Also known as leverage.

Advertising

The direct sale of print or some other types of City communication medium to provide access to a select target market.

Ambush Marketing

A promotional strategy whereby a non-sponsor attempts to capitalize on the popularity/prestige of a property by giving the false impression that it is a sponsor. Often employed by the competitors of a property's official sponsors.

Audio Mention

The mention of a sponsor during a TV or radio broadcast.

Business-to-Business Sponsorship

Programs intended to influence corporate purchase/awareness, as opposed to individual consumers.

Category Exclusivity

The right of a sponsor to be the only company within its product or service category associated with the sponsored property.

Cause Marketing

Promotional strategy that links a company's sales campaign directly to a non-profit organization. Generally includes an offer by the sponsor to make a donation to the cause with purchase of its product or service. Unlike philanthropy, money spent on cause marketing is a business expense, not a donation, and is expected to show a return on investment.

Co-sponsors

Sponsors of the same property.

CPM (Cost per Thousand)

The cost to deliver an ad message to a thousand people.

Cross-Promotions

A joint marketing effort conducted by two or more co-sponsors using the sponsored property as the central theme.

Donations

Cash or in-kind gifts that do not include any additional negotiated conditions in return.
Synonyms: Philanthropy, Patronage.

Editorial Coverage

Exposure that is generated by media coverage of the sponsored property that includes mention of the sponsor.

Emblem

A graphic symbol unique to a property. Also called a mark.

Escalator

An annual percentage increase built into the sponsorship fee for multi-year contracts. Escalators are typically tied to inflation.

Exclusive Rights

A company pays a premium or provides economic benefit in exchange for the right to be the sole advertised provider, at the most competitive prices, of goods purchased by consumers within Parks, Recreation, and Forestry Department facilities and parks.

Fulfillment

The delivery of benefits promised to the sponsor in the contract.

Hospitality

Hosting key customers, clients, government officials, employees, and other VIPs at an event or facility. Usually involves tickets, parking, dining, and other amenities, often in a specially designated area, and may include interaction with athletes.

In-Kind Sponsorship

Payment (full or partial) of sponsorship fee in goods or services rather than cash.

Licensed Merchandise

Goods produced by a manufacturer (the licensee) who has obtained a license to produce and distribute the official Marks on products such as clothing and souvenirs.

Licensee

Manufacturer which has obtained a license to produce and distribute Licensed Merchandise.

Licensing

Right to use a property's logos and terminology on products for retail sale. Note: While a sponsor will typically receive the right to include a property's marks on its packaging and advertising, sponsors are not automatically licensees.

Mark

Any official visual representation of a property, including emblems and mascots.

Mascot

A graphic illustration of a character, usually a cartoon figure, used to promote the identity of a property.

Media Equivalencies

Measuring the exposure value of a sponsorship by adding up all the coverage it generated and calculating what it would have cost to buy a like amount of ad time or space in those outlets based on media rate cards.

Media Sponsor

TV and radio stations, print media, and outdoor advertising companies that provide either cash, or more frequently advertising time or space, to a property in exchange for official designation.

Municipal Marketing

Promotional strategy linking a company to community services and activities (sponsorship of parks and recreation programs, libraries, etc.)

Option to Renew

Contractual right to renew a sponsorship on specified terms.

Philanthropy

Support for a non-profit property where no commercial advantage is expected. Synonym: Patronage.

Perimeter Advertising

Stationary advertising around the perimeter of an arena or event site, often reserved for sponsors.

Premiums

Souvenir merchandise, produced to promote a sponsor's involvement with a property (customized with the names/logos of the sponsor and the property).

Presenting Sponsor

The sponsor that has its name presented just below that of the sponsored property. In presenting arrangements, the event/facility name and the sponsor name are not fully integrated since the word(s) "presents" or "presented by" always come between them.

Primary Sponsor

The sponsor paying the largest fee and receiving the most prominent identification (Would be naming rights or title sponsor if sponsored property sold name or title).

Property

A unique, commercially exploitable entity (could be a facility, site, event, or program) Synonyms: sponsee, rightsholder, seller.

Right of First Refusal

Contractual right granting a sponsor the right to match any offer the property receives during a specific period of time in the sponsor's product category.

Selling Rights

The ability of a sponsor to earn back some or all of its sponsorship fee selling its product or service to the property or its attendees or members.

Signage

Banners, billboards, electronic messages, decals, etc., displayed on-site and containing sponsors ID.

Sole Sponsor

A company that has paid to be the only sponsor of a property.

Sponsee

A project, event, or asset available for sponsorship.

Sponsor

An entity that pays a property for the right to promote itself and its products or services in association with the property.

Sponsor ID

Visual and audio recognition of sponsor in property's publications and advertising; public-address and on-air broadcast mentions.

Sponsorship

The relationship between a sponsor and a property, in which the sponsor pays a cash or in-kind fee in return for access to the commercial potential associated with the property.

Sponsorship Agency

A firm which specializes in advising on, managing, brokering, or organizing sponsored properties. The agency may be employed by either the sponsor or property.

Sponsorship Fee

Payment made by a sponsor to a property.

Sports Marketing

Promotional strategy linking a company to sports (sponsorship of competitions, teams, leagues, etc.).

Supplier

Official provider of goods or services in exchange for designated recognition. This level is below official sponsor, and the benefits provided are limited accordingly.

Title Sponsor

The sponsor that has its name incorporated into the name of the sponsored project, event, or asset.

Venue Marketing

Promotional strategy linking a sponsor to a physical site (sponsorship of stadiums, arenas, auditoriums, amphitheaters, racetracks, fairgrounds, etc.)

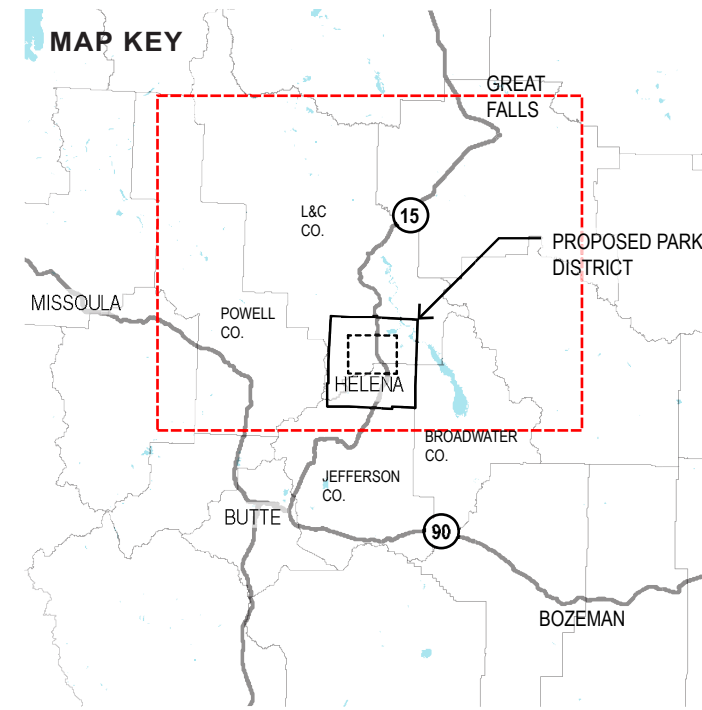
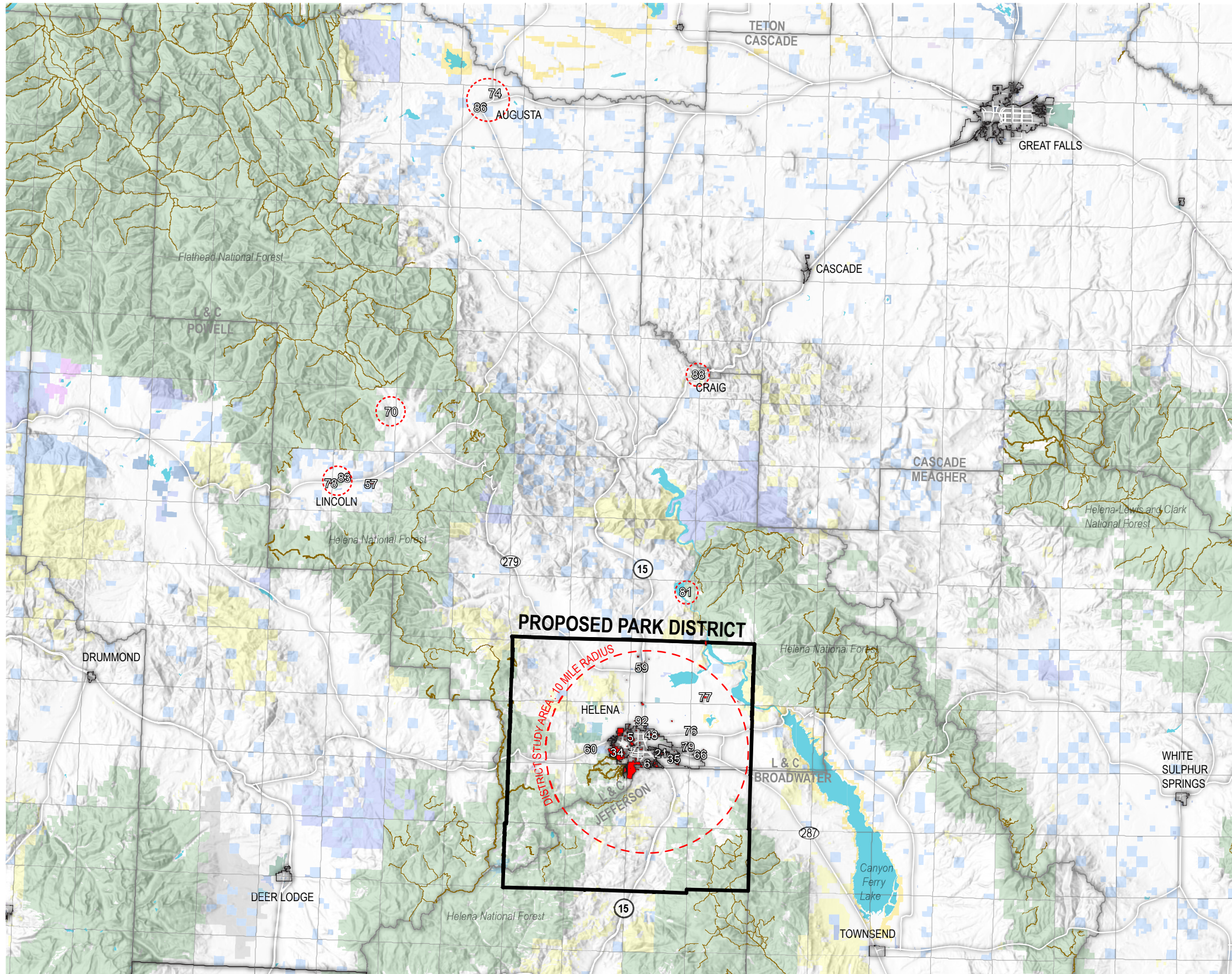
Web Sponsorship

The purchase (in cash or trade) of the right to utilize the commercial potential associated with a site on the World Wide Web, including integrated relationship building and branding.

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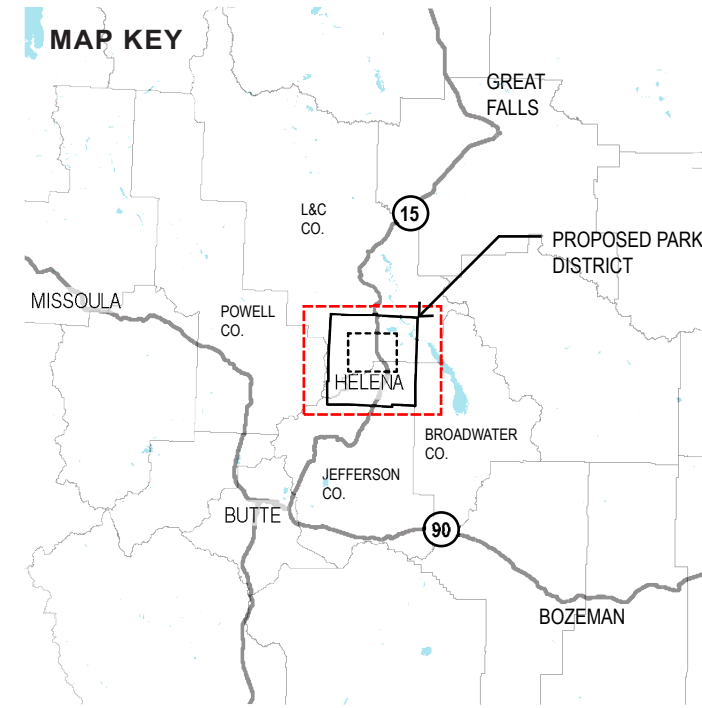
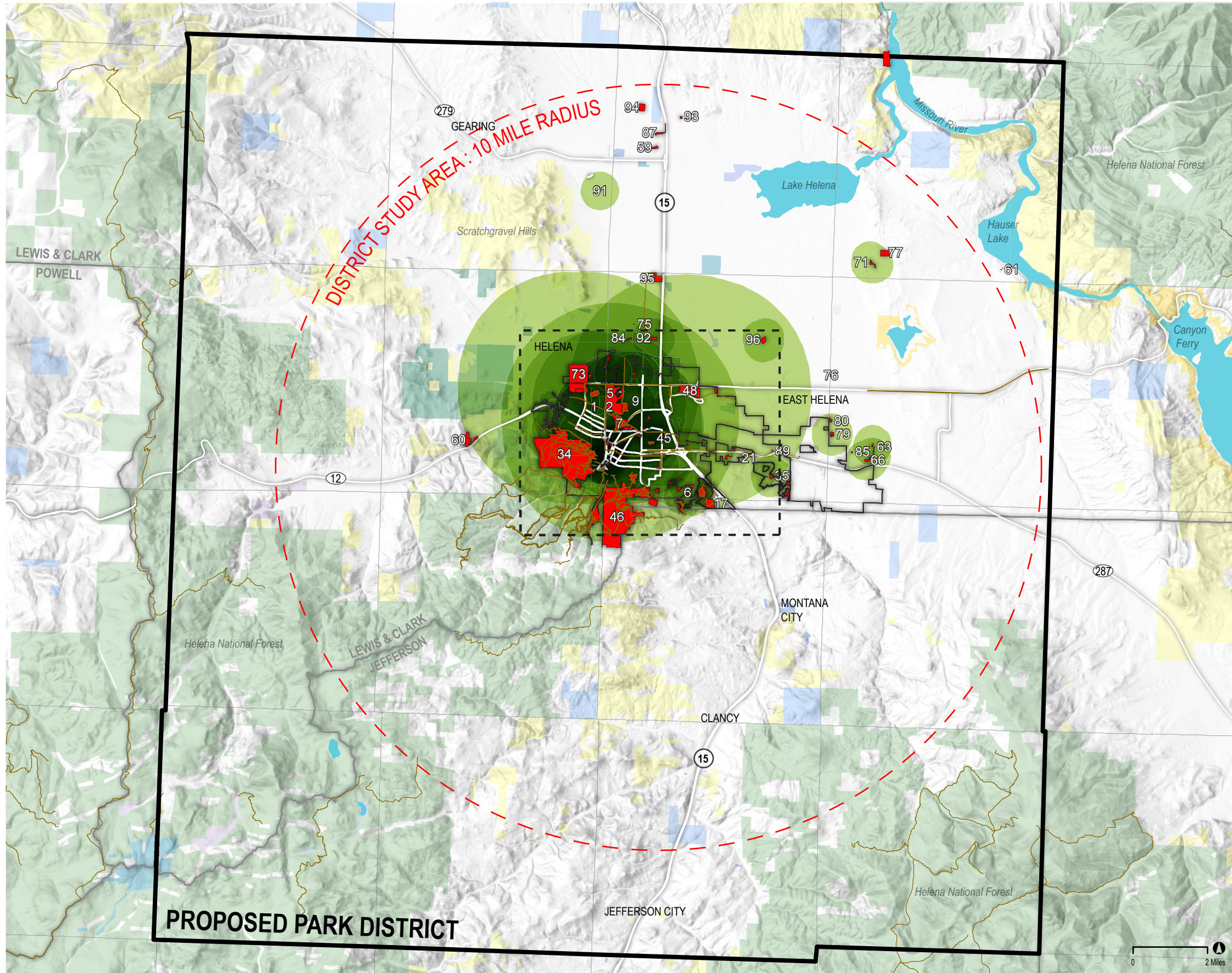
APPENDIX C: MAPPING RESOURCES

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- LEGEND**
- PROPOSED PARK DISTRICT
 - TRAILS
 - HELENA PARKS¹
 - CITY LIMITS
 - US BUREAU OF RECLAMATION²
 - US BUREAU OF LAND MANAGEMENT²
 - US FORST SERVICE²
 - US ARMY CORPS OF ENGINEERS²
 - STATE OF MONTANA²
 - MONTANA STATE TRUST LANDS²
 - MONTANA FISH, WILDLIFE, AND PARKS²
 - MONTANA UNIVERSITY SYSTEM²

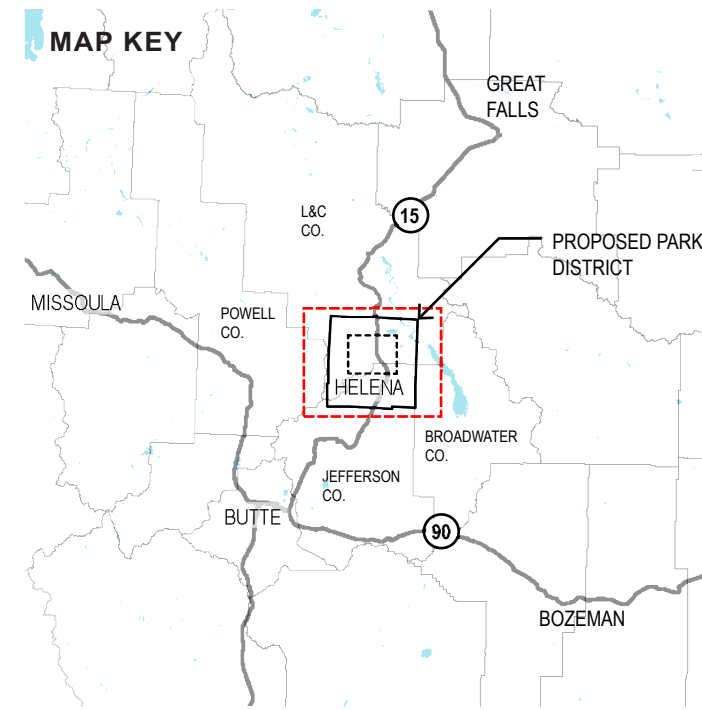
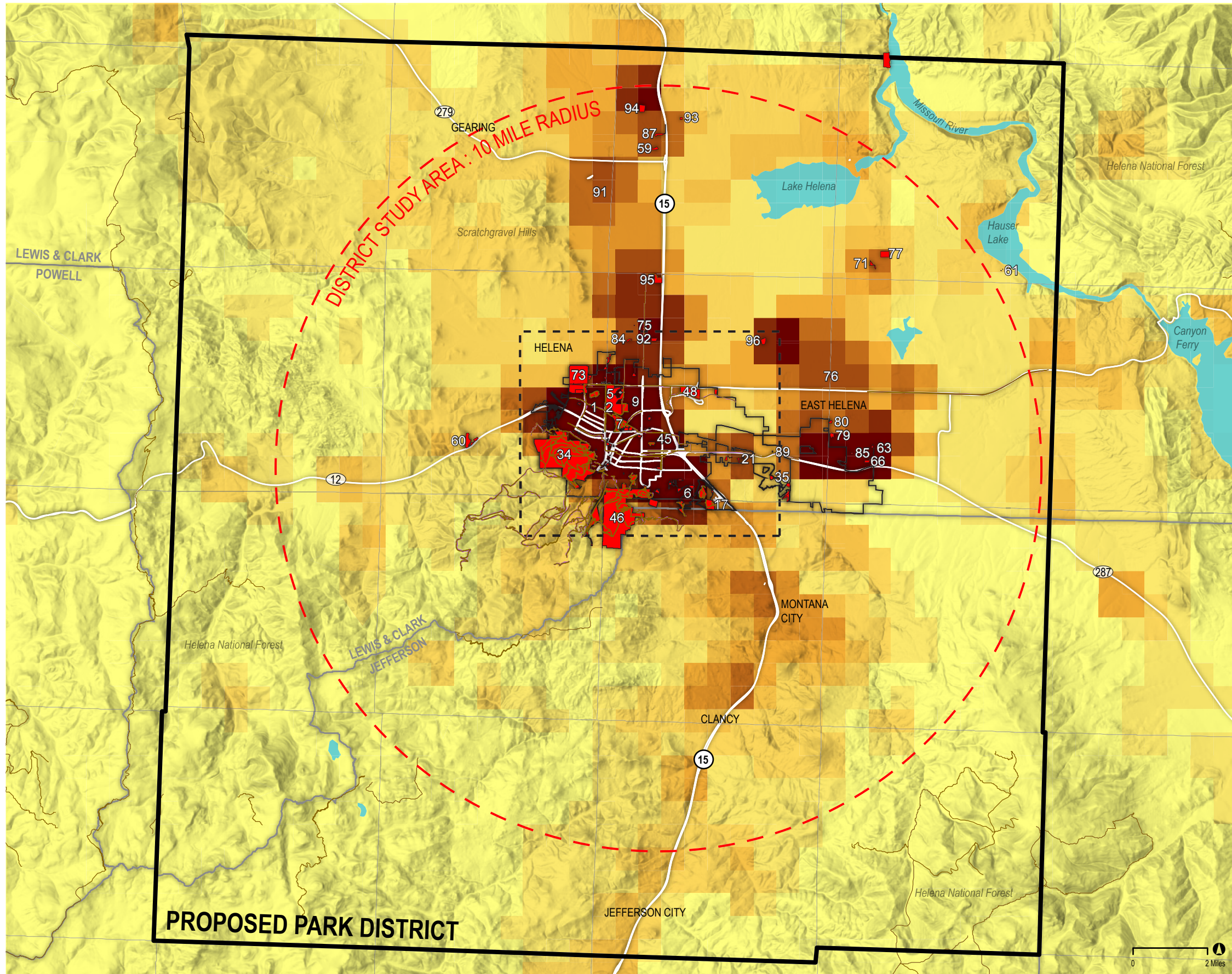
NOTES:
¹ Includes open space and unimproved sites
² Montana Public Lands: Montana State Library



- LEGEND**
- PROPOSED PARK DISTRICT
 - PARK CATCHMENT AREA¹
 - TRAILS
 - HELENA PARKS²
 - HELENA CITY LIMITS
 - US BUREAU OF RECLAMATION³
 - US BUREAU OF LAND MANAGEMENT³
 - US FORST SERVICE³
 - US ARMY CORPS OF ENGINEERS³
 - STATE OF MONTANA³
 - MONTANA STATE TRUST LANDS³
 - MONTANA FISH, WILDLIFE, AND PARKS³
 - MONTANA UNIVERSITY SYSTEM³

NOTES:

- ¹ Level of Service Park Catch Areas have been generated by buffering Regional Parks (3 mi), Community Parks (2 mi), and Neighborhood Parks (0.5 mi). Open / Unimproved, Alternate Providers, and Other site have not been buffered.
- ² Includes open space and unimproved sites
- ³ Montana Public Lands: Montana State Library



LEGEND

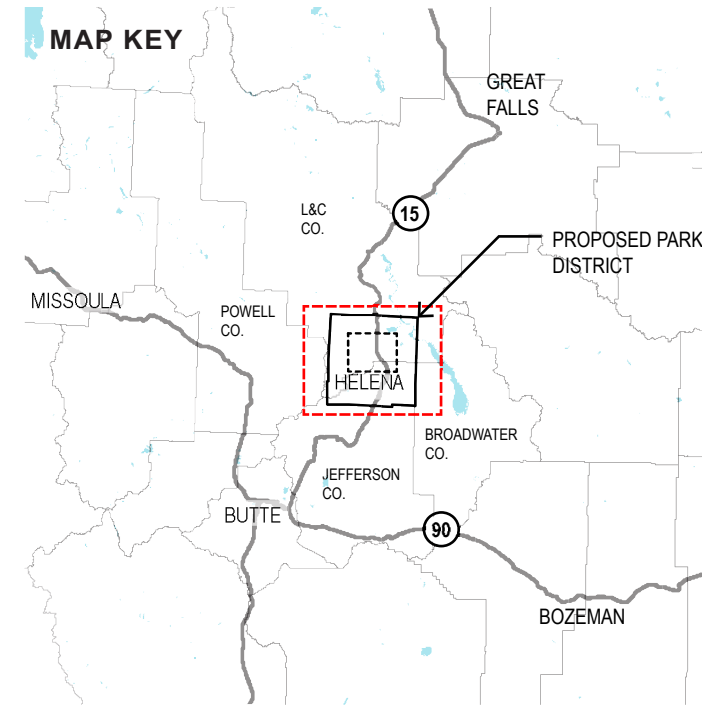
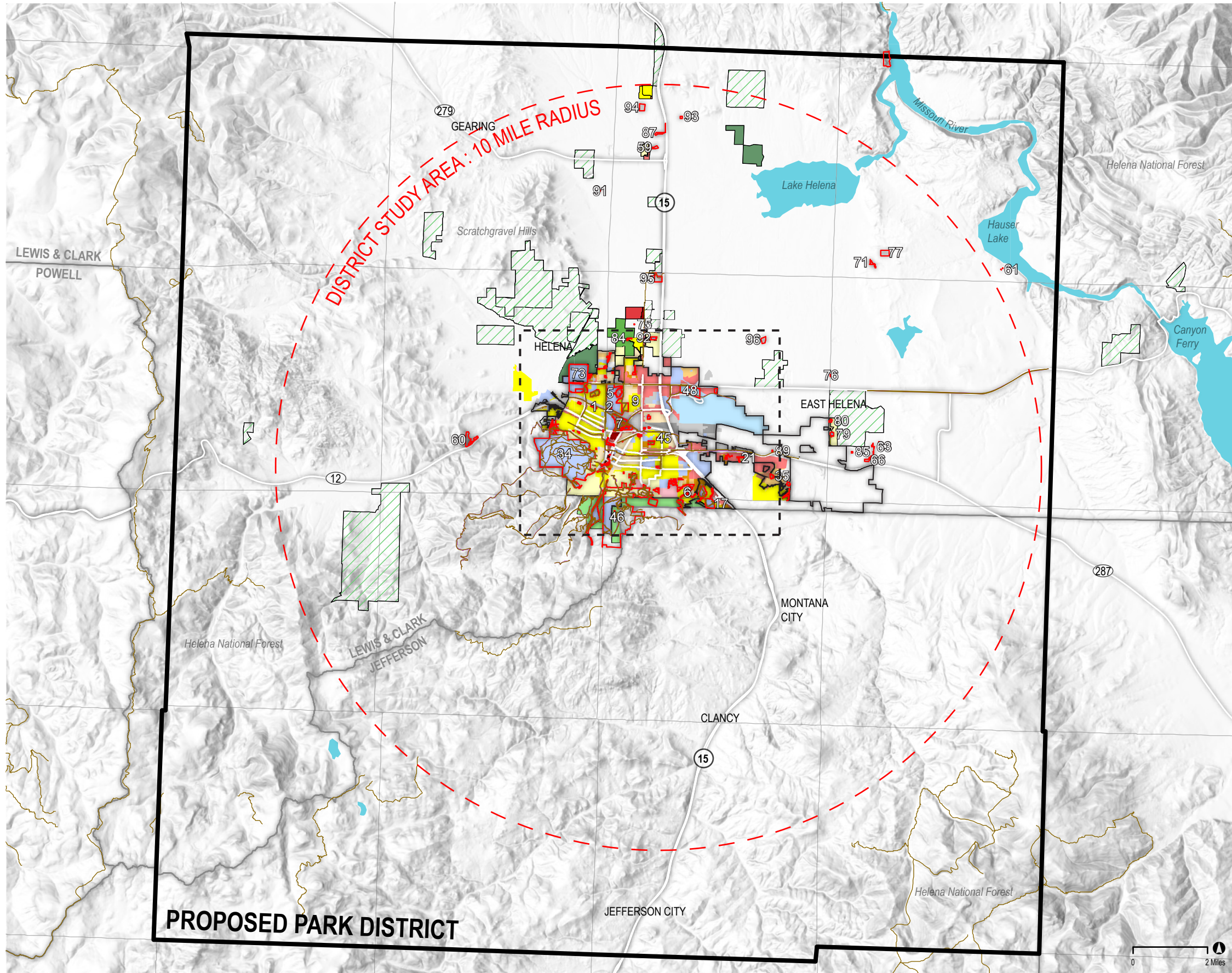
POPULATION DENSITY / NUMBER OF INHABITANTS¹

	+2422		HELENA PARKS ²
	1478 - 2422		HELENA CITY LIMITS
	889 - 1478		
	555 - 889		
	349 - 555		
	206 - 349		
	106 - 206		
	46 - 106		
	13 - 46		
	0 - 13		

PROPOSED PARK DISTRICT

TRAILS

NOTES:
¹ Montana Census Blocks with Population Data: U.S. Department of commerce, U.S. Census, 2010
² Includes open space and unimproved sites



LEGEND

ZONING CODES

OSR ¹	AIRPORT ¹
R-1 ¹	PLI ¹
R-2 ¹	CLM ¹
R-3 ¹	MI ¹
R-4 ¹	PUD ¹
R-O ¹	RRA, SAG ²
R-U ¹	A ²
B-1 ¹	CR ²
B-2 ¹	PRE-PLAN ²
B-3 ¹	HELENA PARKS ³

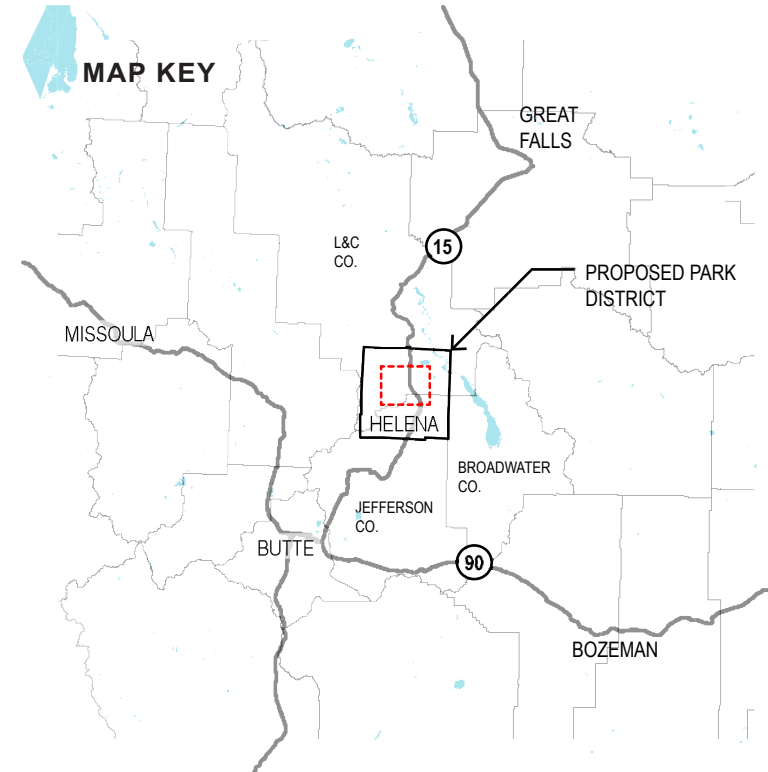
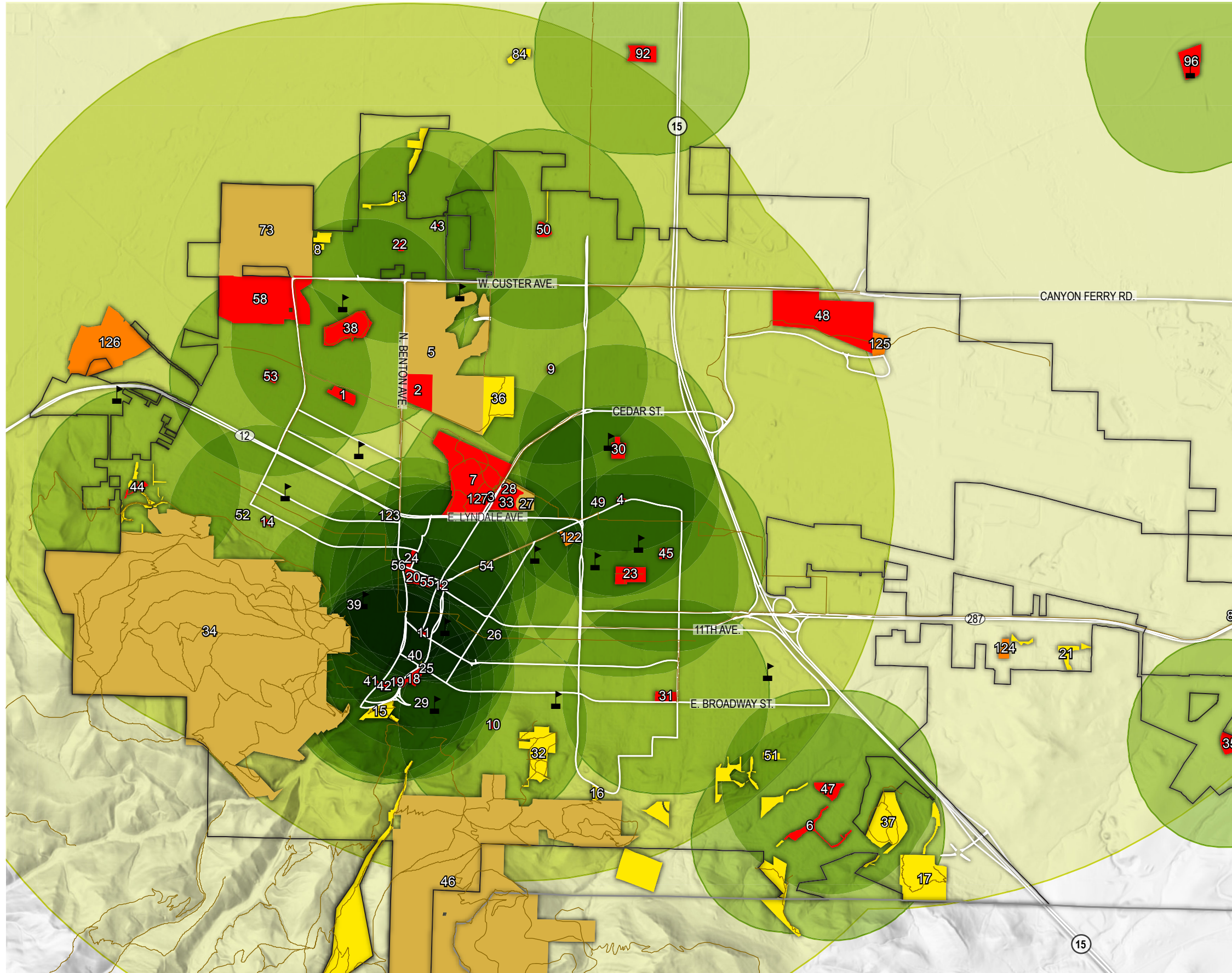
PROPOSED PARK DISTRICT
 TRAILS
 HELENA CITY LIMITS

NOTES:

¹ Helena Zoning: helenamontanamaps.org

² Lewis and Clark County Zoning: helenamontanamaps.org

³ Includes open space and unimproved sites



LEGEND

- TRAILS
- REGIONAL PARK CATCHMENT AREA¹
- COMMUNITY PARK CATCHMENT AREA¹
- NEIGHBORHOOD PARK CATCHMENT AREA¹
- HELENA PARKS
- ALTERNATIVE PROVIDERS
- OTHER
- OPEN / UNIMPROVED
- PUBLIC SCHOOLS
- HELENA CITY LIMITS

NOTES:
¹ Level of Service Park Catch Areas have been generated by buffering Regional Parks (3 mi), Community Parks (2 mi), and Neighborhood Parks (0.5 mi). Open / Unimproved, Alternate Providers, and Other site have not been buffered.

