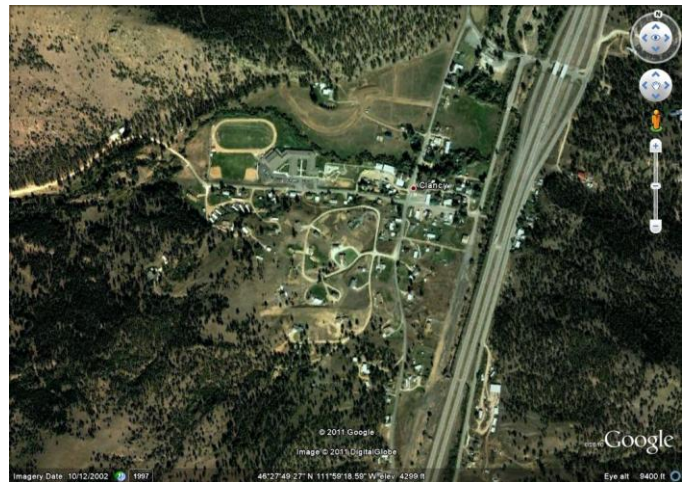


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# Greater Helena Area Sustainability Project Narrative

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Submitted to:

**Sustainable Communities Regional Planning Grant Program**  
**US Department of Housing and Urban Development**  
Opportunity Number: FR-5500-N-30PA  
Competition ID: SCRP-30

October 6, 2011

Submitted By:  
**City of Helena, Montana**

In cooperation with:  
City of East Helena,  
City of Townsend,  
Town of Boulder,  
Lewis and Clark County,  
Jefferson County,  
Broadwater County

**Greater Helena Area Sustainability Project  
Sustainable Communities Regional Planning Grant Narrative**

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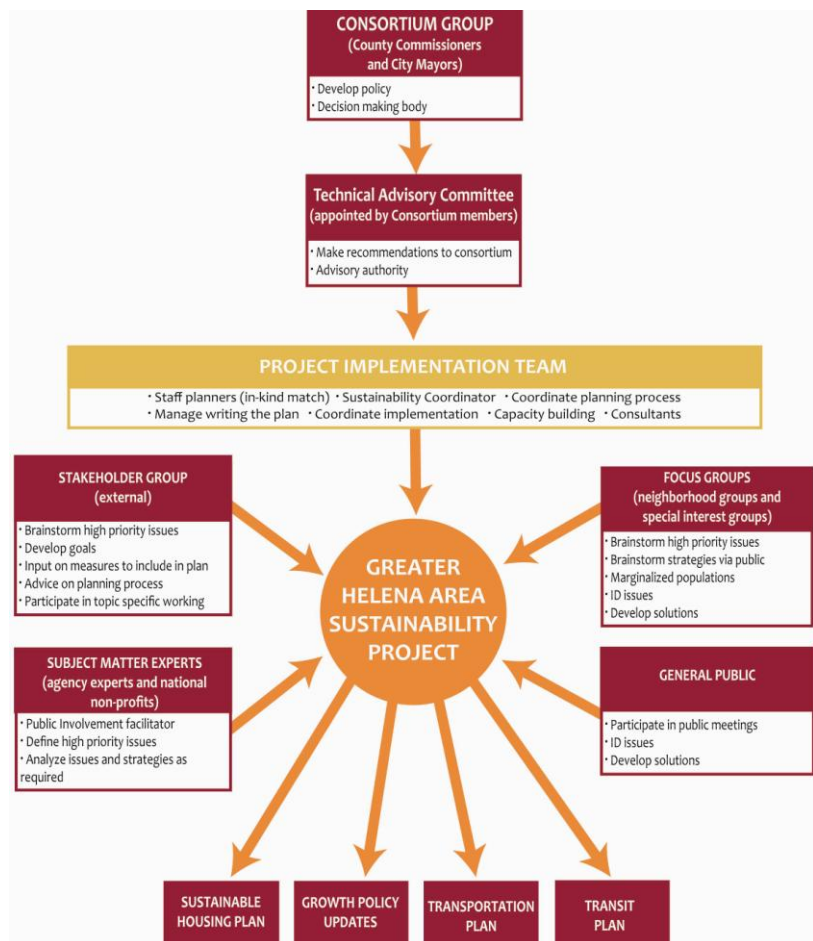
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## I) Capacity and Experience

### 1. Governance and Management

The primary objective of the Greater Helena Area Sustainability Project (GHASP) is to develop partnerships between the City of Helena and its neighboring cities and counties in order to develop common goals and a mutual understanding of transportation, housing and other infrastructure needs in the region. Our proposed governance and management structure (Organizational Chart in Appendix A) is organized to achieve this outcome. A graphic of the Work Plan can be found in Appendix B. The Project Area Map can be found as an attachment in this grant package, as stipulated.

**1.1 Background** – The recently adopted Growth Policy for the City of Helena laid the foundation for a Regional Sustainability Plan for the Greater Helena Area. The plan incorporates the ten principles of Smart Growth. It sets goals and polices related to land, transportation, housing, infrastructure investment and the environment for the City and its many partners. The Helena Growth Policy includes the designation of an urban services boundary. This boundary was developed in conjunction with Lewis and Clark County and is intended to be an area where both jurisdictions adopt joint development standards and coordinate infrastructure planning. Inter-local agreements between Helena and Lewis and Clark County exist and are important to resolving growth and infrastructure related issues. Because of the proximity of the City of Helena to Broadwater and Jefferson Counties, it is important that these agreements be extended to these neighboring counties.



Jefferson County recently approached the City of Helena about the possibility of City infrastructure being extended to the northern portion of that county. Unfortunately this did not occur because an agreement could not be reached in the timeframe necessary for the proposed development. A change in the Helena urban services boundary to include northern Jefferson County requires coordinated growth policies, a housing plan, and a transportation plan that the GHASP planning effort provides. GHASP will serve as a policy framework for the growth planning necessary for regional infrastructure services.

The City of East Helena and Broadwater County are also close neighbors of Helena with whom economic, environmental and social futures are interdependent. The City of East Helena recently completed its Growth Policy and annexed land that is adjacent to the Helena urban boundary. There is significant planning underway for the environmental cleanup of the area surrounding the long-closed

East Helena Smelter. GHASP’s Transportation Plan Update, Transit Plan Update, and Housing Plan will provide specific infrastructure plans under the guidelines established by Growth Policies newly aligned by GHASP. This would be the first such effort in the state of Montana and may serve as a model for other joint studies that transect county lines.

**1.2 Consortium Group** – GHASP will establish a decision making body made up of one elected official from each Consortium member to direct policy decisions, receive recommendations from a Technical Advisory Committee, and have final decision making authority. The Consortium Group will operate under the principles of interest based problem solving to work through historical differences and find common ground with which to move forward. The Consortium Group will establish ground rules and operating principles to effectively guide the development of GHASP. With mutually developed goals and interest based problem solving, a long term objective is for the Consortium Group to evolve into a Regional Planning Council similar to the existing Helena City – Lewis and Clark County Planning Board. A list of Consortium Members includes:

<b>Cities</b>	<b>Counties</b>
Helena	Lewis and Clark County
East Helena	
Townsend	Broadwater County
Boulder	Jefferson County

**1.3 Technical Advisory Committee** - GHASP will create a Technical Advisory Committee (TAC), an inclusive group of urban and rural governmental representatives who strategize, problem-solve and work in each of the communities. The Technical Advisory Committee will have advisory authority, making recommendations to the Consortium Group. TAC will have representatives appointed by elected officials from each consortium partner.

A list of core TAC partners may include:

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li><b>A.</b> Planning Directors</li> <li><b>B.</b> Public Works Directors</li> <li><b>C.</b> Law Enforcement</li> <li><b>D.</b> Helena Housing Authority</li> <li><b>E.</b> School Districts</li> </ul> | <ul style="list-style-type: none"> <li><b>F.</b> Intergovernmental Transit Committee</li> <li><b>G.</b> Rocky Mountain Development Council, Inc. (RMDC)</li> <li><b>H.</b> Montana Business Assistance Connection (MBAC)</li> </ul> |
|---|---|

**1.4 Project Implementation Team** – At least one staff person from each Consortium partner will be on the PIT, exposing each to new learning and promising practices, such as utilizing GIS for Landscape Suitability Analyses. Planning consultants will also be hired through a competitive Request for Proposals (RFP) process to serve on the PIT. Members of the implementation team will share knowledge and understanding as the plan progresses. The team will meet at least monthly and sometimes weekly during the preparation of GHASP. One Senior Planner from the City of Helena will be designated as the Sustainability Coordinator for the plan’s development. Members of this team will attend TAC, Focus Group, and Stakeholder Group meetings, providing continuity and keeping the project on track. PIT staff time will be used towards the in-kind match to HUD’s Regional Sustainable Communities Planning Grant.

**1.5 Subject Matter Experts** – Subject Matter Experts will be used to provide facts about specific issues. These experts may work for agencies such as the Montana Department of Environmental Quality, the Environmental Protection Agency, or HUD. They may also be private individuals or national non-profit groups. Their level of commitment to the plan is different than that of Stakeholders or Focus Groups, as they are not impacted directly by it. Their understanding of issues on a broader scale is important for understanding policy regulatory issues.

**1.6 Administrative Information Management** – Projects go smoothly when diverse groups discuss issues openly, communicate clearly, and listen. Because PIT consists of a variety of government employees and private sector consultants who do not share intranet, we propose to establish a project management website using Basecamp, an online management and collaboration tool.<sup>1</sup> This will keep key personnel responsible for grant implementation effectively coordinating cross-programmatic goals. It will also reduce email traffic, which can be discriminating to folks who are not at a computer during all working hours, as with many part-time rural planners. The site will allow file sharing, messaging, scheduling, and document management. The cost of this service is \$50 per month for the base service and allows the creation of 35 sub-projects and an unlimited number of users.

**1.7. Resource Allocation** – The Sustainability Coordinator will allocate the resources following the detailed budget and its supplementing task list.

## **2. Public Involvement Plan**

A solid public involvement strategy is critical to the success of GHASP because the Consortium Group members are elected officials who need buy-in for any plans they will support. The Project Implementation Team's approach understands, identifies and articulates issues and interests of communities and individuals who might be impacted and/or affected by the plan, working to find creative ways to solve problems. The Public Involvement Plan includes special outreach efforts to marginalized and disadvantaged populations in the planning area including Native American, disabled, low-moderate income, and elderly citizens.

Each component of GHASP (aligning growth policies, developing the regional Housing, Transit, and Transportation plans) will implement the Public Involvement Plan. The Public Involvement Plan described below is split into two phases, a Group Development/Issue Identification Phase and a Problem Solving/Decision Making Phase. Public Involvement is addressed by referencing these phases in the approaches to individual sustainability plans.

**2.1 Facilitator** - A professional facilitator will lead public outreach and participation work tasks. The facilitator will refine and facilitate the public involvement strategy, be involved in interviews with community members, and assist in defining the issues identified. A skilled facilitator is a critical component of a broad approach to public involvement.

**2.2 Public Communication Tools** - The Project Implementation Team and Facilitator will conduct small meetings, larger visioning events, and surveys to engage stakeholders and community members on sustainability initiatives important to them. Communication will utilize the following tools

- A. Newspapers
- B. Community Notices and Meetings
- C. Individual Meetings
- D. Newsletters
- E. Project Websites
- F. Web-based Surveys
- G. Social Media
- H. Additional Media Releases, particular to areas and/or issues
- I. Telephone

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<sup>1</sup> <http://basecampHQ.com>

**2.3 Target Group Analysis** – In addition to general calls for participation, a target group analysis will be conducted to identify individual and community stakeholders, predict their interests and issues, and discuss the potential roles of each in the public outreach process. This will include taking extra care to include minority stakeholders, such as Native American, low-income, and elderly populations.

#### **2.4 Public Involvement Phase I - Group Development and Issue Identification**

**A. Initial Interviews** - Conduct interviews with individuals identified in the target group analysis to develop a current understanding of public and community interests relative to sustainability, livability, and future growth. The PIT will use this information to develop Focus Groups and the Stakeholder Group.

**B. Stakeholder Group** – This is a group of Stakeholders that meets monthly during Phase I of the Public Involvement process. Its role is to make sure strategies are mutually beneficial. The following is a list of possible stakeholders in this project.

- University of Montana-Helena
- Carroll College
- Smart Growth Montana/Plan Helena
- Helena Non-motorized Transportation Advisory Council (NMTAC)
- Helena Citizen Council
- Broadwater Economic Development Council
- County Extension Agents
- Jefferson County Economic Development Council
- Aging Services
- Local Hospitals
- Trucking Industry
- Helena Indian Alliance
- Homeless Shelters
- Chamber of Commerce

**C. Focus Groups** - Focus Groups will be formed around individual issues. This is a primary effort to reach out to traditionally marginalized groups. Focus Groups are fluid and some community members will sit on multiple Focus Groups.

We anticipate groups focused on areas such as non-motorized transportation, affordable housing, disabilities, recreation, smart growth, and aging services. Unincorporated communities will also have Focus Groups. They are critical to ensuring that livability issues are understood and addressed in the plan. Existing community leaders are an important tool to organizing Focus Groups that are a true representation of population. Utilizing leaders knowledge and relationships to bring people to the table is important.

Web-based options are not a mechanism for reaching marginalized populations. People do not always have or use the internet and other new technologies, particularly aging populations. When reaching out to Focus Groups, PIT will remain flexible and apply their preferred method of communication. This can mean mail service, community liaisons, phone calls, and newspapers or community postings.

**D. Open House** - Two central principles of sustainability planning are transparency and inclusiveness. We will hold an open house and/or community meeting in each of the sub-areas (communities) for the general public to affirm the interests and livability issues. The Professional Facilitator will develop an implementation strategy for this, which may vary between meetings.

**E. Set Sustainability Goals** – The PIT will work with the general public, Focus Groups, TAC, and the Consortium Group to establish sustainability and livability goals for each particular planning effort to include tangible, measurable outcomes.

- F. Identify Issues** - Inform the public on the planning process. Listen to concerns and goals and objects and to identify critical issues that need to be addressed.

## **2.5 Public Involvement Phase II – Problem Solving and Decision Making**

- A. Interest-based Problem Solving** – Using an interest-based problem solving approach, utilizing information from individuals, the Stakeholder Group, Focus Groups, and Open Houses, TAC and PIT will reach an agreement on recommendations for the Consortium. “Interest-based” problem solving is a process that helps people deal with their differences. In this process, issues are discussed and decided on their merit rather than personal position, values, emotions, opinions, and biases. Interest-based problem solving is hard on the issues, soft on people. It enables involved parties to be fair while protecting against those who would take advantage of this. While every issue is different, the basic elements do not change.
- B. Open Houses** - We will hold two open houses during Phase II for each sub-area. The public will review constraints and express concerns in the first meeting and review, strategies, scenarios and final recommendations in the second. The Facilitator will develop an implementation strategy for this, which may vary between sub-areas.
- C. Revisit** - Members of PIT will revisit individual community members and Focus Groups throughout Phase II. The Facilitator will not necessarily partake in this. However, he or she may be utilized to train PIT members on effective ways to communicate.
- D. Make Final Decisions** – TAC, with the guidance of PIT, will use the information gained from the public involvement process to make final recommendations to the Consortium Group.

## **3. Experience**

**3.1 Staff Experience** -The Project Implementation Team’s staff members from the City of Helena have vast experience developing comprehensive planning documents. Staff members from the Counties have less experience. This is an opportunity for them to build capacity.

The City of Helena Senior Planner, Kathy Macefield, will be the Sustainability Coordinator on this project. Her experience in this type of planning is broad. As a planner for Helena she also works closely with Lewis and Clark County to coordinate efforts. She is currently responsible for maintaining compliances with statutory time frames, coordinating special projects such as updating and rewriting planning documents, technical review of land use applications, writing reports, giving public presentations, and administering grants in compliance with federal requirements. She is also responsible for successful completion of large projects with consultants and developing and conducting public outreach programs. She was the lead staff member for the long range planning efforts in the City of Helena and the Principal Planner for the City's Growth Policy.

Her resume along with other staff members working on GHASP can be found in Appendix C.

**3.2 Consultant Experience** - A significant portion, 75%, of the planning will be conducted by private consultants. The consultants will be selected through a competitive RFP process. After hearing from Stakeholders and Focus Groups, consultants will define issues, utilize Subject Matter Experts, and communicate facts to TAC and the Consortium Group for prioritization. The consultants will then develop implementation strategies to overcome issues.

In Montana there are Land Use and Transportation Planners who are committed to the Greater Helena Area and GHASP in particular. A private Transportation Planner from Montana wrote the majority of

this grant application, including the approach, schedule, and budget sections. Other planners in Montana also have a proven ability to update growth policies and transportation and transit plans, as evidenced by the recently adopted Helena Growth Policy. When necessary, national consultants will be used to develop portions of GHASP through a competitive RFP process. The City of Helena has extensive experience managing consultants.

## **II) Statement of Need**

### **1. Geography**

GHASP will bring together three geographically large and dispersed Montana Counties to create one comprehensive regional plan for sustainable development. Sustainable planning in Montana has posed significant challenges because of the large distance between small population centers, and also between small communities and major employment centers. Lewis and Clark County, Broadwater County and Jefferson County cover 6,396 square miles, an area larger than the state of Connecticut. The total population of the planning area is 80,413, according to the 2010 US Census.

Helena, located in Lewis and Clark County, is the economic hub for the region, the State Capital, and the regional trade center. The City of East Helena is an incorporated town located approximately four miles east of Helena. The East Helena smelter is now closed but the city is left with an environmental legacy that includes an Environmental Protection Agency (EPA) Superfund Site.

Boulder is the county seat for Jefferson County and it's only incorporated town with government and sewer and water infrastructure. Interstate 15 (I-15) serves as a 30 mile commuter corridor between Helena and Boulder. The towns of Montana City, Clancy, and Jefferson City fall in between and will be included in this study (sub-areas). In some areas, these towns are connected by sprawl of one house per-acre. Jefferson County borders on the City of Helena. The political and geographic differences between Helena and Jefferson County have made regional planning difficult. There is little doubt that existing policy and governance structures have contributed to the sprawling, motor vehicle oriented land use.

Townsend, 34 miles from Helena, is the county seat for Broadwater County and is it's only incorporated city. Toston and Radersburgh are other small rural towns in Broadwater County and will be included in the study (sub-areas). Being unincorporated is an impediment to basic infrastructure in Montana. Solving this issue will help provide affordable housing in towns and reduce the pattern of sprawl, which the Project Area Map clearly shows.

### **2. Housing Costs**

**2.1 Housing Plus Transportation Costs-** Data is unavailable for regional housing costs from the required source. It is unknown how many households have housing plus transportation costs greater than 45% of their income. However, the following data is available for nearby Montana cities that have similar demographics to the City of Helena:

- A.** Great Falls - 87% of population has housing plus transportation costs over 45% of income
- B.** Billings - 83.6% has housing plus transportation costs over 45% income
- C.** Missoula - 96.6 % has housing plus transportation costs over 45% of income

Because of the geography, most workers commute on a daily basis from outlying areas to Helena in single occupancy vehicles. As gas prices continue to rise, the daily cost of transportation has become a significant burden on workers. There is currently no alternative means of transportation for people in sub-areas to access the City of Helena. This is expected to be a future issue for the elderly population,

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as they will not be able to drive to reach critical services such as medical attention. Below is a table from the recent Greater Helena Transit Plan Update depicting where people live and where they work. 47% of Jefferson County commutes daily to Lewis and Clark County.

County of Work	County of Residence					
	Lewis and Clark County		Jefferson County		Broadwater County	
	(#)	(%)	(#)	(%)	(#)	(%)
Broadwater County, MT	78	<1%	11	<1%	1,397	70%
Lewis and Clark County, MT	27,170	96%	2,256	47%	403	20%
Jefferson County, MT	441	2%	1,879	39%	24	1%
Silver Bow County, MT	38	<1%	386	8%	5	<1%
Cascade County, MT	158	1%	11	<1%	6	<1%
Missoula County, MT	88	<1%	11	<1%	2	<1%
Out of State	209	1%	71	1%	25	1%

*Source: 2000 US Census of County-to-County worker flow files.*

**2.2 Housing Needs Assessment** - In 2010 the Greater Helena Area Housing Task force commissioned a Housing Needs Assessment.<sup>2</sup> Key findings included:

- A. In 2008, based on the definition of cost burden being housing costs >35% of income, the median home cost to own a home exceeded the household income for households in the area. Affordable options for low to moderate income households to purchase a home are becoming more difficult to find. In addition to homebuyers, senior citizens on fixed income are experiencing severe cost burden for rental units. This is projected to become worse over the next ten years.
- B. There is a shortage of rental units overall and especially affordable rental units for low to moderate income households. The vacancy rate in Lewis and Clark County is significantly lower than statewide or national rates. Households have a six to eight month wait for public housing units and Section 8 vouchers. However even if more vouchers became available, there is not enough rental inventory to meet the demand for units.
- C. According to projections by the Montana Board of Housing (BOH), over the next ten years 300 homeowners and 133 rental households per year will be added to Lewis and Clark County. Housing construction for homeowners should meet the demands for units. However, housing stock for renters has a severe gap in the number of rental units needed to meet the demand for every income levels. For low to moderate income households, agencies would need to increase renter assistance by 50 households per year and homeowner assistance by 75 households per year to maintain the same level of service as they are currently providing.
- D. There is a need for smaller homes and one-story homes, as the population is aging and driving the demand for units with aging-in-place features.
- E. Demographic data indicates special needs will increase over the next 20 years. The 65 and over age cohort is projected to increase from 11.7% of the population in 2000 to 24.6% of the population in 2030. The U.S. census report indicates that in 2000, 40% of the population over 65 reported some type of disability.

**2.3 Market Analysis** - In 2010, the Rocky Mountain Development Council commissioned a market analysis for the Helena Housing Authority by The Gill Group.<sup>3</sup> Average market unit rents in the area were \$620 for one-bedroom units and \$670 for two-bedroom units. Median family income was \$34,416

<sup>2</sup> Helena Area Housing Needs Assessment. Applied Communications. [www.appcom.net](http://www.appcom.net). 2010.

The Helena Area Task Force includes: City of Helena, Lewis and Clark County, Helena Association of Realtors, Helena Housing Authority, Rocky Mountain Development Council, Helena Building and Industry Association, AWARE Inc., local financial institutions, and other community partners. The study area included the City of Helena, surrounding valley, East Helena, and the north valley to Canyon Ferry.

<sup>3</sup> The Gill Group - <http://www.gillgroup.com/>

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and 51% of gross income for renters was spent on housing. The following graphic from the study shows the overwhelming majority of low and moderate income renters spend over 35% of their income on rent.

<b>HOUSEHOLD INCOME BY GROSS RENT AS A PERCENTAGE</b>		
<b>INCOME</b>	<b>Lewis and Clark County (#)</b>	<b>Helena (#)</b>
<b>Less Than \$10,000</b>		
Less than 20%	48	48
20-24%	106	97
25-29%	86	84
30-34%	44	39
35% +	1,035	816
Not Computed	210	131
<b>\$10,000-\$19,999</b>		
Less than 20%	130	120
20-24%	93	83
25-29%	198	156
30-34%	224	206
35% +	733	529
Not Computed	70	24
<b>\$20,000-\$34,999</b>		
Less than 20%	672	551
20-24%	540	435
25-29%	311	209
30-34%	113	58
35% +	145	68
Not Computed	138	81
<b>\$35,000-\$49,999</b>		
Less than 20%	655	453
20-24%	163	101
25-29%	45	40
30-34%	15	7
35% +	32	8
Not Computed	16	8
<b>\$50,000 or more</b>		
Less than 20%	761	565
20-24%	25	10
25-29%	13	0
30-34%	18	0
35% +	8	0
Not Computed	34	21
<b>TOTAL</b>	<b>6,681</b>	<b>4,948</b>

### **3. Environmental Justice**

**3.1 East Helena** – There is a disproportionate concentration of environmental or human health hazards in low-income communities or neighborhoods where historically low-income people reside. According to the US Census, the average family income in East Helena is \$35,455. This is about \$5,000 less than the Montana state average of \$40,487. The East Helena Superfund Site includes a lead smelter that operated from 1888 until 2001, the town of East Helena, several residential subdivisions, and surrounding rural agricultural lands. For more than 100 years, lead and zinc smelting operations deposited lead, arsenic, copper, zinc, cadmium, and some 15 other hazardous substances into the soil, surface water and ground water of the Helena Valley. ASARCO shut the plant down on April 4, 2001. The shutdown has been characterized by ASARCO as temporary.<sup>4</sup>

About 1,800 to 2,000 people live within one and one half miles of the smelter complex and most of the residential properties within that area were, until a yard cleanup began in 1991, contaminated with lead above health-based concentrations. Approximately 180-200 residential yards and several hundred acres of undeveloped lands remain contaminated with lead to this day. Most of the area's residences are hooked up to a municipal or community water supply system. ASARCO, the principal potentially responsible party, has cooperated with the Environmental Protection Agency in cleanups both on the plant site and in the adjoining community of East Helena. Cleanup of East Helena will allow the community to achieve a sustainable future with environmental, social and economic success.<sup>5</sup>

Prior to 1985, two-thirds of East Helena's children exhibited blood lead ratios greater than ten micrograms per deciliter and one-third exhibited ratios greater than 15 micrograms per deciliter. ASARCO is now funding a county-administered health education and abatement program, with health professionals stationed within the community and its schools. In spring 1999, EPA, the Agency for Toxic Substances and Disease Registry, the County, Department of Environmental Quality, and ASARCO reviewed the program's effectiveness using door to door surveys and other evaluation methods.<sup>6</sup> A final report is available from the County Health Department.<sup>7</sup> The program received high grades for its performance.

**3.2 Nitrate Levels** - Many one-acre parcels with individual septic and wells exist in unincorporated areas of all three counties. In some locations the nitrate levels in residential drinking water reach unacceptable levels due septic systems effecting groundwater conditions. Environmental regulations require a one-acre minimum lot size to install a septic system. Recent changes in the state regulations relative to septic systems and nitrates require even more land for a septic system to be installed, exacerbating the potential for residential sprawl. There are several financial and legal impediments to infill development and sustainable growth in Montana. Lower costs of land and fewer property taxes in rural counties are a strong impetus for residents looking to build new homes in outlying areas. Montana policy to support clean groundwater has in many ways driven land sprawl over the past 30 years. Septic systems are relatively inexpensive to install and the cost can be financed in the tax exempt mortgage of the home. GHASP will look for policy and financial solutions to reverse impediments to infill development.

Montana's Treasure State Endowment Program (TSEP) is the primary method local communities use to fund local sewer, water, storm drainage and bridge infrastructure. The bi-annual funding program derives its revenue from a trust funded by Montana's severance tax on coal. Funding levels approved by the Montana legislature for 2012-2013 are \$552,000 for biennium planning grants and \$13.9M for biennium construction grants. Statewide needs far exceed these funding levels. Funding is reactionary

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<sup>4</sup> <http://www.epa.gov/region8/superfund/mt/easthelena/>

<sup>5</sup> <http://www.epa.gov/region8/superfund/mt/easthelena/>

<sup>6</sup> <http://www.epa.gov/region8/superfund/mt/easthelena/>

<sup>7</sup> <http://www.epa.gov/region8/superfund/mt/easthelena/#12>

and prioritized for fixing existing infrastructure deficiencies and failures. Current program policy prohibits program funds from accommodating community growth, including planning for sustainable community development. GHASP will contribute to the conversation in Montana’s State Capital about infrastructure funding to support sustainable, livable and prosperous communities as well as identify other means of funding.

#### 4. Transportation Access

The recent Helena Transit Development Plan Update found that in 2005, 5.8 % of households in the Greater Helena Area were transit dependent. However the majority of this population resides in the City of Helena, where public transit options exist. The table below shows the Modes of Transportation to Work in 2000. This data does not, however, include Broadwater County. It also does not make projections based on aging populations in the sub-areas, who will not have the ability to drive for much longer. GHASP seeks to address this by planning to find access for the elderly to Helena as well as for economic development in those rural towns, so services will be closer to residents.

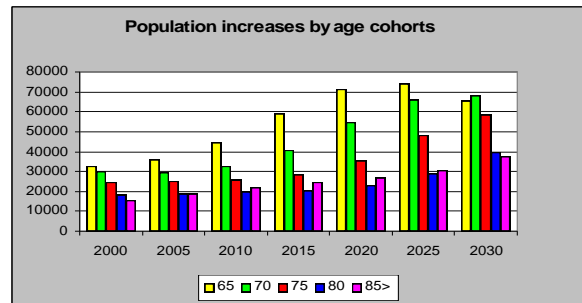
	<b>Helena City</b>	<b>Helena City</b>	<b>Lewis and Clark County</b>	<b>Lewis and Clark County %</b>	<b>Jefferson County</b>	<b>Jefferson County %</b>
Drove Alone	9,753	742%	21,570	75.9%	3,641	75.2%
Carpool	1,364	10.4%	3,439	12.1%	678	14.0%
Public Transportation (incl. Taxicab)	91	0.7%	127	0.4%	8	0.2%
Motorcycle	0	0.0%	26	0.1%	10	0.2%
Bicycle	164	1.2%	187	0.7%	13	0.3%
Walk	1,187	9.0%	1,574	5.5%	178	3.7%
Other	41	0.3%	111	0.4%	21	0.4%
Work at Home	539	4.1%	1,377	4.8%	293	6.1%
1 Average Travel Time (mins)	12.6		16.7		22.4	
<i>Source: 2000 Census, LSC, 2006,</i>						

#### 5. Marginalized Populations

The following graphic depicts racial demographics by County. This data was gathered from the Montana Office of Public Instruction.

Fiscal Year	County	Enrollment	Asian	American Indian or Alaskan Native	Hispanic or Latino	Black or African	White non-Hispanic	Native Hawaiian
2011	Broadwater	437	1.3%	5.2%	5.7%	1.0%	86.4%	.3%
2011	Jefferson	1178	1.1%	4.3%	2.1%	1.0%	91.0%	.5%
2011	Lewis and Clark	6438	1.0%	5.3%	2.8%	1.0%	89.3%	.3%

**5.1 Elderly** – The largest marginalized population in the study area is the elderly. 2003 census projections indicated that by 2030, Montana is expected to rank 3rd in the Nation in the percentage of people over the age of 65 at 25.8%. As farmers retire they are moving from their land. If they are lucky, they are able to leave it to the next generation and remain at home. Unfortunately this is not often the case, as many younger people have moved away to cities. As farmers age further, their reliance on the land becomes unrealistic. More and more they will need ADA accessible housing in towns where medical attention, fresh food, and the ability to walk or use transit is available. The map to the right, from Montana State Plan on Aging, depicts these predictions.<sup>8</sup>



According to the 2010 census, in Broadwater County only 4.8% of the population is under five years old, while 21.5% is over 65 years, a number that is anticipated to grow. This is about 8% greater than the percent of the US population over 65, which is 12.9%. Meanwhile, about 6.7% of the US population is under five years old, 2% higher than Broadwater County.

**5.2 Native Americans** – Native Americans represent about 5% of school aged children in the study area. This is lower than some other areas in Montana but significantly higher than the national average. There is no Indian Reservation included in GHASP. Native Americans in the project area live among the general population.

**5.3 Low-income** – Currently 10.3% of the GHASP area is living below the poverty line. The majority of this population is located in the City of Helena and the City of East Helena. The City of Helena and the State of Montana tend to have high percentage of people below the poverty line, when compared to the United States, however unemployment rates are usually lower than national averages.

## 6. Economic Opportunity

The only major employment center in the study area is in the City of Helena, which has a robust localized economy. This economy is based on government, transportation, communication and utilities, wholesale trade, finance, insurance and real estate and services sectors. Each of these categories has experienced reasonable growth over the past few years and appears to remain stable. Major employers are the State of Montana and the Federal Government US Forest Service.

There are trade centers in Townsend, East Helena and Boulder with some employment in retail, cement manufacturing, timber products and agriculture. For the most part, they are bedroom communities for Helena. GHASP will provide the first plan to address the issue of employment as it affects the combined cost of transportation and housing on a regional scale. A goal is to boost the economy and employment options in the rural communities as well as increase transit to and from the City of Helena.

Montana communities lack adequate funding for infrastructure to supports vital, prosperous and sustainable communities as centers of regional commerce. Incorporated and unincorporated towns usually have a state highway through town, which is paved but often does not include sidewalks. Sidewalks that exist in rural communities were often constructed 40 to 50 years ago, are in poor shape, and are inaccessible by ADA standards. The lack of infrastructure investment over the past 50 years poses a significant challenge to creating economically stable communities. Infrastructure needs are significant and addressing them appears out of financial reach.

<sup>8</sup> Montana State Plan on Aging, 2008 through 2011. State of Montana. <http://www.dphhs.mt.gov/sltc/aboutsltc/whatsnew/AgingFinalStatePlan.pdf>

## 7. Fresh Food Access

Fresh food access is a growing concern for elderly people in the outlying areas. Although most households have vehicles, many of these people are aging, on fixed incomes, and will not have this access for much longer. In Jefferson County, about 22% of low-income people live farther than a mile (likely more than five or ten miles) from grocery stores. Even in the denser Lewis and Clark County, 15% of low-income people live farther than a mile from a grocery store. The Project Area Map depicts where in the study area grocery stores can be found.

## 8. Healthy Communities

Very little information is available for the requested information in the Healthy Communities Section of Rating Factor Form 3. Montana's estimated 2007 total population is just under one million, with roughly 740,000 adults. Of those adults, approximately 39% are considered overweight and another 23% are considered obese, according to 2007 Behavioral Risk Factor Surveillance System data. Problems are also seen in factors related to obesity and other chronic diseases. Almost 20% of Montana adults report no leisure time physical activity in the past month and only one quarter report eating fruits and vegetables at least five times a day.

The National Immunization Survey shows that Montana is not meeting three of the five Healthy People 2010 goals for breastfeeding based on children born in 2005.

The problem is not limited to adults alone. 13% percent of Montana youth (9th–12th grades) are overweight, and another 10% are obese, according to 2007 Youth Risk Behavior Survey data.

- A. Only 45% are meeting current physical activity recommendation levels.
- B. Approximately one-in-five youth eat fruits and vegetables five or more times a day.
- C. Approximately one quarter drink at least one non-diet soda each day.
- D. 22% percent watch three or more hours of television each day.

Obesity also affects the state's economy. In Montana, the medical costs associated with adult obesity were \$175 million in 2003 dollars. The graphic below depicts data available from the Montana Department of Health and Human Services about the percentage of the population suffering certain conditions.

	Population	Asthma	Diabetes	Heart Disease Death/1000	Low Birth Weight
Broadwater	3316	9.2%	5.1%	234.9	3%
Jefferson	7939	9.2%	5.1%	133.9	9%
Lewis & Clark	43039	9.2%	5.1%	184.8	8%

## **III) Approach**

### **1. General Description of Proposed Plan**

**1.1 Desired Outcomes** - GHASP seeks to affect the following outcomes:

- A. Develop sustainable partnerships between the Counties, Towns and the City of Helena.
- B. Improve health, livability, and safety of residents in small rural towns.
- C. Strengthen existing towns as centers for economic activity and employment.
- D. Develop infrastructure and affordable housing in order to reduce rural sprawl and preserve agricultural land.
- E. Increase infrastructure funding to support existing towns as centers for growth to be proactive about demographic shifts, particularly increases in elderly populations, by planning for affordable, ADA accessible housing and mobility.
- F. Improve non-motorized transportation facilities and transit service in cities and towns in order to:
  - Reduce greenhouse gas emissions.
  - Reduce the cost of transportation.
- G. Provide transit connections between small towns and critical services in Helena.
- H. Create clusters of services and residential density in rural communities and Helena to support transit.
- I. Improve understanding of the connection between infrastructure investment and economic development, land use patterns, public health and livable communities.

**1.2 Components** - To achieve the goals and desired outcomes of GHASP, we propose several components to the planning process including:

- A. Sustainable Housing Plan
- B. Aligned County and City Growth Policies
- C. Regional Transportation Plan
- D. Regional Transit Plan

**1.3 Approach** - The approach for achieving the desired outcomes of this plan includes:

- A. Focus on strengthening the rural towns in the study area to enhance the safety, health, walkability and livability for their citizens.
- B. Use placemaking and town building techniques to strategically invest in infrastructure as a catalyst for economic development and to enhance livability.
- C. Develop a reasonable prediction of the number and types of housing required in each community over the next 20 years.
- D. Use GIS analysis techniques to identify land suitable for infill development.
- E. Develop estimates for the number of residential units that can be expected to develop.
- F. Develop growth scenarios for each of the counties, towns and cities.
- G. Evaluate and remove regulatory barriers that inhibit infill.
- H. Study transit options to link the towns with Helena employment and service centers including commuter vanpools and special needs transit.
- I. Implement an extensive public involvement outreach program to include community and stakeholder groups in the development of the plan using an interest-based problem solving approach with various groups.

**1.4 Existing Plans** - GHASP proposes to knit together and harmonize the multitude of planning documents that exist for each of these counties, city and towns into a regional plan for sustainable development. Existing policies and plans to be included are:

- A. Broadwater County Growth Policy Plan: Comprehensive Economic Development Strategy - July 2003
- B. Broadwater County Capital Improvement Program
- C. Jefferson County Growth Policy - June 2003/Update November 2009
- D. Lewis and Clark County: Growth Policy - February 2004
- E. City of Helena Growth Policy - May 2011
- F. Helena Transit TDP - 2007-2011
- G. Greater Helena Area Transportation Plan - 2004
- H. Helena Area Housing Needs Assessment - December 2010
- I. Helena Climate Change Task Force Action Plan- 2009
- J. East Helena Growth Policy-2009
- K. Townsend Growth Policy - 2010

A successful product will influence subsequent community-based efforts to implement GHASP, including updated zoning codes, updated zoning maps, development of regulations, and Capital Improvement Plans (CIP).

## **2. Sustainable Housing Plan**

The Housing Plan is a launching point for the overall GHASP planning process. Most of the data collected through GIS Analysis and Public Involvement will be recycled into the other components of GHASP, including the Growth Policy Updates, Transit Plan, and Transportation Plan. Specific descriptions of the tasks required to prepare the Sustainable Housing Plan are as follows:

**2.1 Project Management** – Provide coordination and management of the planning process, develop and monitor schedules, work plans, budgets, progress reports and project communications. Facilitate and drive the project to being completed on time and within budget.

**2.2 Information Gathering** – Gather the extensive information on existing conditions necessary to conduct the Sustainable Housing Plan. This includes the initial Open Houses, as described in the Public Involvement Plan Phase I.

**2.3 Public Involvement Phase I**– Conduct Phase I Public Involvement as described previously.

**2.4 Develop Community Tapestries** – Assemble neighborhood geographic and demographic information for each census zone including existing households, population and Economic and Social Research Institute (ESRI) community tapestry characteristics. The Community Tapestry segmentation system divides U.S. residential areas into 65 unique segments based on demographic variables and consumer behavior characteristics, providing an accurate and detailed description of America's neighborhoods. Tapestries will be incorporated into the GIS database and neighborhoods classified by approximate tapestry type and anticipated demographics changes to occur during the study period. Access and use of this type of information will build capacity for local planning organizations.

**2.5 Demographic Analysis** - Prepare a defensible set of estimates of what population, age and income demographics will be in the future for the study areas. All available sources of information on population counts for the areas will be used in generating the estimates. This will include a past, current and future demographic analysis, with year-by-year estimates through 2024. Both high and low growth scenarios will be developed to provide a range of projections. This effort will build from and add to the growth projections included in existing Growth Policies.

The method used will entail application of the progression population model. The front end of this estimation technique relies upon data on birth and death rates. This is combined with assumptions about area migration patterns by age. Allocations are then projected across sub-areas, towns, and

neighborhoods within the study area. Here the focus will be on identifying how future demographics will be distributed geographically within the planning area.

**2.6 Housing Needs Assessment** - Existing housing supply and demand numbers, type, and affordability will be evaluated in Helena and each of the counties and towns. Demographic projections will be used to determine the number of residents per household. Neighborhood tapestry information predicts the number of residents derived from each household and the housing types needed in the future. Projections for a high and low growth scenario will be developed to provide a range of projections.

**2.7 GIS Analysis & Map Series** – A landscaped based suitability analysis will be conducted to determine feasible locations and densities for infill development within the urban areas based on existing assets geography and land use. A GIS map series will be prepared to show key information in determining constraints and adjacencies that impact housing location planning. Maps to be prepared include:

- |  |   |
|--|---|
| <b>A.</b> Geographic Constraints (Floodplains, wetlands, steep slopes, etc.) | <b>H.</b> School District Information                               |
| <b>B.</b> Land Ownership   | <b>I.</b> Historic Resources  |
| <b>C.</b> Airports   | <b>J.</b> Superfund and Brownfield Sites, groundwater contamination |
| <b>D.</b> Soils & Agricultural Resources                                     | <b>K.</b> Existing Sewer and Water Infrastructure                   |
| <b>E.</b> Existing Housing Resources   | <b>L.</b> Wildfire Urban Interface                                  |
| <b>F.</b> Existing Land Uses including commercial services                   | <b>M.</b> Urban and Rural Fire Districts                            |
| <b>G.</b> Wildlife Habitat   | <b>N.</b> Parks & Open Space  |

**2.8 Sustainability Assessment** – Research and assess a range of environmental, economic, and social equity challenges within the study area, such as housing costs, air quality, and infrastructure capacity. Inventory and assess the greenhouse gas emissions for government operations and their individual sources, such as buildings and transportation. This assessment serves to establish greenhouse gas emissions as a benchmark measure of effectiveness (MOE) for growth scenario planning.

**2.9 Phase II Public Involvement** - Conduct Public Involvement Phase II as described previously.

**2.10 Developable Land Assessment** - Layering the GIS map series together in a subtractive process identifies existing assets to be leveraged within the sub-areas to identify neighborhoods and areas that are suitable for residential development. Sub-areas are evaluated for the feasible addition of residential units and densities. A number and type of residential units that could be added will be derived for each neighborhood based on census zones.

**2.11 Regulation Policy Review** – Review existing regulations and policies that act as barriers to infill and suggest changes to encourage and promote infill development

**2.12 Growth Scenario Planning** - Prepare and model two scenarios for household growth projections for neighborhoods in the GIS database. The City of Helena Planning Department has experience with growth scenario planning, as they have been used in previous planning efforts. Other sub-areas will build capacity by learning how to use this tool.

The first scenario will be a status quo model to evaluate future conditions if no action is taken. This will provide a benchmark to quantify and qualify tradeoffs of change based scenarios. The second scenario will focus on infill development if higher density occurs with adequate sewer, water and transportation

infrastructure. A comparison and analysis of the scenarios will be developed including population, net density and income.

**2.13 Sustainability Analysis** - Develop Sustainability Measures of Effectiveness to compare the scenarios and measure progress towards sustainability. One of the primary axioms of sound management is *you cannot manage what you cannot measure*. Community indicators will be used and sustainability benchmarks will be established by the Consortium Group to compare the land use scenarios. Quantitative measures to compare the options will also include:

- A. Transit Supportive Land Use Analysis
- B. Travel Mode Share Estimates
- C. Density – Vehicle Miles Traveled Analysis<sup>9</sup>
  - Measure CO2 levels for greenhouse gas emissions.
  - Estimate combined housing and transportation cost per household
- D. Walkability Index using Google’s walkability tool<sup>10</sup>

**2.14 Infrastructure Analysis** – Prepare an analysis of the infrastructure required to support each land use scenario including transportation, sewer and water. Provide order of magnitude planning level opinions of probable construction costs for each scenario.

**2.15 Implementation Strategies** – Develop individual strategies or measures to achieve community sustainability goals and the preferred land use scenario. Develop individual implementation plans aimed at achieving each strategy or measure. This will include:

- A. Implementation timeline
- B. Responsible department/organization
- C. Key milestones for each measure

A matrix of initiatives and goals and an implementation matrix for day-to-day to management and coordination of the plan will be created. Develop implementation activities and staffing to implement the plan and track progress.

The potential cost and effectiveness of a *Transportation Management Association* comprised of a partnership between the three counties, the City of Helena and the Montana Department of Transportation will be assessed.

**2.16 TAC Recommendations** - As described in Phase II Public Involvement, present draft growth scenarios and sustainability analysis to the TAC for review and comment. Present results of public outreach efforts. Facilitate recommendations on a preferred growth scenario for presentation to the Consortium Group.

**2.17 Consortium Group Decisions on Policy Direction** - Present draft growth scenarios and sustainability analysis to the Consortium Group for review and comment. Present results of public outreach efforts and recommendations from TAC. Work with group to develop a final housing plan to be adopted by the group. Every effort will be made to develop a plan that will have consensus support by each member of the Consortium. However, individual jurisdictions will have the option to adopt or not adopt the proposed plan.

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<sup>9</sup> <http://www.icleiusa.org/action-center/tools>

<sup>10</sup> <http://www.walkscore.com>

### **3. Align Growth Policies**

Each of the counties in this study area has an existing Growth Policy, as required by state law. Broadwater County has indicated an interest in updating their policy as part of this process. The City of Helena recently updated their policy. Lewis & Clark County's policy was prepared in 2004 and Jefferson County's policy was updated in 2009. PIT will work with the Consortium Groups to update Growth Policies to be consistent with GHASP.

Updates to Growth Plans are covered under Montana Law MCA 76-1-6. This statute outlines the requirements of Growth Policies for content, implementation and coordination between cities and counties and leaves the adoption and implementation "at the full discretion of the governing body." However, MCA 76-1-601(3) state that a Growth Plan must contain a statement of how the governing bodies will coordinate and cooperate with other jurisdictions.

The City of Helena's recently adopted 2011 Growth Policy is already aligned with Federal Sustainability and Livability goals and is the impetus for this regional plan. Chapter 11 of the Growth Policy addresses the issues of jurisdictional coordination and the desire for regional planning. Sections of the policy are germane to this discussion as follows:

"This MOU [City of Helena and Lewis and Clark County] recognizes the value of sustainable land development and its necessity in efficiently providing services and infrastructure, such as water and wastewater treatment, parks, transportation networks, and emergency services in the Helena Valley...Since both the City of Helena and Lewis & Clark County are now in the process of updating their growth policies, those documents should describe how the two jurisdictions will carry out the intent of the 2009 MOU...It would be highly beneficial for the City of Helena and Lewis & Clark County, and perhaps other adjacent jurisdictions willing and able to participate, to jointly complete the planning process set forth in this subsection. An area larger than the urban standards area may be more appropriate for this process. However, to do so may require professional planning resources beyond those currently available in the City and County planning staffs, and it may be necessary to seek assistance from state and federal governments in the form of grants to complete the task in a timely manner. It appears that state and federal grants for regional planning for sustainable communities are available at this time." <sup>11</sup>

The GHASP process will create a unified regional growth strategy that will help resolve some of the conflict that has existed between the jurisdictions in the past. The Consortium Group will operate under the principles of interest-based problem solving to work through historical differences and find common ground with which to move forward. The GIS maps developed in the landscape-based suitability analysis will be extremely useful in updating each Growth Policy and will add a depth to data and analysis that rural agencies and planners have not previously had. The process and work items for the update of each Growth Plan is as follows:

**3.1 Project Management** - Provide coordination and management of the planning process, develop and monitor schedules, work plans, budgets, progress reports and project communications. Facilitate and drive the project to be completed on time and within budget.

**3.2 Gather Information** – Gather additional information required to complete the study.

**3.3 Population** – The demographic analysis done for the GHASP Housing Plan will provide the foundation for an update to this section each Growth Policy. The following issues will be analyzed:

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<sup>11</sup> <http://www.ci.helena.mt.us/departments/community-development/planning/2011-growth-policy-adopted.html>

- |                             |                              |
|-----------------------------|------------------------------|
| <b>A.</b> GIS Maps          | <b>D.</b> Issues             |
| <b>B.</b> Population Growth | <b>E.</b> Goals & Objectives |
| <b>C.</b> Demography        | <b>F.</b> Implementation     |

**3.4 Economic Conditions** – Add economic goals, objectives and an implementation plan. Much of the economic research done for the GHASP Housing Plan will provide the foundation for an update to this section of the Growth Policy by discussing the following:

- |                       |                              |
|-----------------------|------------------------------|
| <b>A.</b> Assets      | <b>E.</b> Issues             |
| <b>B.</b> Employment  | <b>F.</b> Goals & Objectives |
| <b>C.</b> Climate     | <b>G.</b> Implementation     |
| <b>D.</b> Development |                              |

**3.5 Housing** - The GHASP Housing Plan will provide the foundation for an update to this section of each growth policy. Update the housing needs derived from the Housing Plan. The following will be included:

- |                           |                              |
|---------------------------|------------------------------|
| <b>A.</b> GIS Maps        | <b>D.</b> Issues             |
| <b>B.</b> Housing Profile | <b>E.</b> Goals & Objectives |
| <b>C.</b> Cost of Housing | <b>F.</b> Implementation     |

**3.6 Public Facilities & Services** – The GHASP Housing Plan will provide the foundation for an update to this section of each growth policy. Update public facilities needs and service enhancements that are a direct result of the Housing Plan. The following will be included:

- |                                    |                                  |
|------------------------------------|----------------------------------|
| <b>A.</b> GIS Maps                 | <b>E.</b> Fire, Police & Sheriff |
| <b>B.</b> Public Works             | <b>F.</b> Issues                 |
| <b>C.</b> Parks & Recreation       | <b>G.</b> Goals & Objectives     |
| <b>D.</b> Municipal Infrastructure | <b>H.</b> Implementation         |

**3.7 Transportation** – Conduct an analysis of the transportation infrastructure network required to create and support the preferred land use alternative developed in the GHASP Housing Plan. The following will be included:

- |  |   |
|--|---|
| <b>A.</b> GIS Maps                     | <b>F.</b> Transportation Demand Management  |
| <b>B.</b> Motorized Transportation     | <b>G.</b> Community Building Infrastructure |
| <b>C.</b> Non-Motorized Transportation | <b>H.</b> Issues                            |
| <b>D.</b> Public Transportation        | <b>I.</b> Goals & Objectives                |
| <b>E.</b> Air Transportation           | <b>J.</b> Implementation                    |

**3.8 Environment** – Update policies related to sustaining or improving environmental conditions in the study area, relying heavily on the landscape-based suitability analysis conducted with the Housing Plan. The following will be included:

- |   |  |
|---|--|
| <b>A.</b> GIS Maps                                | <b>F.</b> Wild Fire Urban Interface Fuel Loads |
| <b>B.</b> Land & Topography                       | <b>G.</b> Issues                               |
| <b>C.</b> Public Health & Safety                  | <b>H.</b> Goals & Objectives                   |
| <b>D.</b> Development Constraints                 | <b>I.</b> Implementation                       |
| <b>E.</b> Wild Fire Urban Interface Spot Fire map |  |

**3.9 Water** – Update policies related to sustaining or improving the water resources in the study area using GIS information developed during the GHASP Housing Plan process. Evaluate changing environment and political conditions related to water quantity, quality and water rights.

- A. Water Quantity
- B. Water Quality
- C. Aquifer Protection
- D. Water Rights

- E. Issues
- F. Goals & Objectives
- G. Implementation

**3.10 Culture** – Update policies related to sustaining or improving the cultural assets in the study area relying on the analysis conducted in the GHASP Housing Plan. Increase knowledge base and understanding of cultural assets as an economic development strategy. The following will be included:

- A. GIS Maps
- B. Historic Cultural Assets
- C. The Arts
- D. Recreation

- E. Education
- F. Issues
- G. Goals & Objectives
- H. Implementation

**3.11 Land Use** – Update policies related to land use based on the preferred scenarios developed during the GHASP Housing Plan process. Each jurisdiction will develop a preferred planning scenario and a status quo planning scenario. Each will have the final authority to incorporate those scenarios into their policy document. The following will be included:

- A. GIS Maps
- B. Current Land Use
- C. Future Land Use

- D. Issues
- E. Goals & Objectives
- F. Implementation

**3.12 Coordination** – Strive to create an organizational structure that will ultimately replace the Consortium Group and TAC with a council of elected officials to serve and represent their constituents on issues related to regional planning. Explore a Regional Planning Council, which the Mayor from each town and the chair of each County Commission would sit on. The group would be supported by staff on a Technical Advisory Committee, which would develop detailed proposals for the Regional Planning Council to review.

**3.13 Subdivision Review** – Update existing subdivision regulations that support the outcomes derived from GHASP.

**3.14 Future Review** – Define a timeline for implementation plan and benchmark outcomes. Set deadlines for implementation and future policy review.

**3.15 Draft Policy** – Produce a draft plan reviewed by the TAC and Consortium Group prior to publication.

**3.16 Public Outreach** - Conduct public outreach as described previously in the Public Involvement Plan. The third round of meetings will include a presentation of the draft report in response to issues presented in previous meetings.

**3.17 Final Policy Adoption** – Produce a final plan responding to public comments and direction from the Stakeholders Group and Consortium Group.

#### **4. Greater Helena Area Transit Plan**

The Helena area currently has transit service provided by the Helena Area Transit Service (HATS) and operated by the City. Helena also recently completed construction of a new transit center. A new regional transit plan will be prepared based on the outcomes of the Sustainable Housing Plan and Growth Policy update work. Specific process and work items required to produce the Transit plan are as follows:

**4.1 Project Management** - Provide coordination and management of the planning process, develop and monitor schedules, work plans, budgets, progress reports and project communications. Facilitate and drive the project to be completed on time and within budget.

**4.2 Gather Information** - Gather base information required for the development of the Transit Plan.

**4.3 Existing Conditions** – Define existing conditions for transportation supply and demand in the region. Focus on safety, mobility and needs of residents. Define existing conditions that address the following issues:

- |  |                                       |
|--|---------------------------------------|
| <b>A.</b> Transportation System Overview               | <b>G.</b> Mobility-Limited Population |
| <b>B.</b> Policy Framework                             | <b>H.</b> Low-Income Population       |
| <b>C.</b> Major Activity Centers                       | <b>I.</b> Zero-Vehicle Households     |
| <b>D.</b> Major Employers                              | <b>J.</b> Travel Patterns             |
| <b>E.</b> Demographics                                 | <b>K.</b> Work Transportation Mode    |
| <b>F.</b> Transit-Dependent Population Characteristics |                                       |

**4.4 Phase I Public Involvement** – Conduct public outreach as described previously.

**4.5 Transit Demand Assessment** – Conduct a comprehensive review of region wide transit demand with the following activities:

- |                                       |   |
|---------------------------------------|---|
| <b>A.</b> Rural Transit Demand        | <b>E.</b> Potential Employee Transit Demand |
| <b>B.</b> Program Trip Demand         | <b>F.</b> Greatest Transit Needs            |
| <b>C.</b> Fixed-Route Demand Model    | <b>G.</b> Performance Measures              |
| <b>D.</b> ADA Demand Estimation Model |   |

**4.6 Service Analysis** – Conduct a detailed transit service analysis to review existing operations and recommend improvements to the following activities. The following will be included:

- |  |                                    |
|--|------------------------------------|
| <b>A.</b> Helena Area Transportation Service | <b>F.</b> Trolley                  |
| <b>B.</b> Rural Transit Service              | <b>G.</b> Ridership Patterns       |
| <b>C.</b> Checkpoint Service                 | <b>H.</b> Vehicle Fleet            |
| <b>D.</b> Dial-a-Ride Service                | <b>I.</b> Other Capital/Facilities |
| <b>E.</b> East Valley Service                |                                    |

**4.7 Coordination** – Conduct meetings to evaluate opportunities for coordination of services with the following agencies and local area transit service providers. The following will be included:

- |  |   |
|--|---|
| <b>A.</b> Montana Department of Transportation | <b>E.</b> Rocky Mountain Development Council    |
| <b>B.</b> Transportation Technical Committee   | <b>F.</b> Spring Meadows Resources              |
| <b>C.</b> Counties                             | <b>G.</b> West Mont Habilitation Services, Inc  |
| <b>D.</b> Montana Independent Living Project   | <b>H.</b> Transportation Management Association |

**4.8 Transit Improvement Program** – Develop a five year Transit Improvement Program (TIP) that defines the investment and spending plan for transit system improvements including the following issues:

- |                                |  |
|--------------------------------|--|
| <b>A.</b> Service Productivity | <b>E.</b> Vehicle Needs & Replacement Schedule |
| <b>B.</b> Service Enhancements | <b>F.</b> Transit Center Operations            |
| <b>C.</b> Vehicle Inventory    | <b>G.</b> Transit Supportive Infrastructure    |
| <b>D.</b> Vehicle Maintenance  |  |

## H. Costs & Funding

**4.9 Financial Plan** – Conduct a detailed financial analysis that develops budgets for operations, maintenance and capital improvement costs and funding.

- |                                 |  |
|---------------------------------|--|
| <b>A.</b> Financial Status      | <b>E.</b> Operating and Financial Performance Measures |
| <b>B.</b> Operational Revenues  | <b>F.</b> Operating Effectiveness                      |
| <b>C.</b> Operational Expenses  | <b>G.</b> Financial Efficiency                         |
| <b>D.</b> Cost Allocation Model |  |

**4.10 Draft Plan** – Produce a draft plan with comments by the TAC and Consortium Group prior to publication.

**4.12 Phase II Public Involvement** - Conduct public outreach as described previously. The third round of meetings will present the draft report and respond directly to issues presented in previous meetings.

**4.13 Final Plan Adoption** – Produce a final plan responding to public comments and direction from the TAC and Consortium Group.

## 5. Greater Helena Area Transportation Plan

The 2004 Helena Area Transportation Plan documents existing transportation challenges, identifies future improvements that will be needed and provides transportation recommendations for the City of Helena and the Helena Valley in Lewis and Clark County. The existing plan follows a long standing format prescribed by the Montana Department of Transportation (MDT) and used in cities across the state. The plan does a good job addressing multimodal transportation needs, but is heavily focused on motor vehicle operations and efficiency. For example, intersection level of service is the primary Measures of Effectiveness (MOE) used to benchmark system effectiveness. A new regional transportation plan is needed that addresses community sustainability issues and benchmarks system effectiveness, using the MOE's established by the GHASP.

The Helena Transportation Plan is the only adopted joint plan by Helena and Lewis and Clark County. Helena has not undertaken formal planning efforts with the other adjacent local jurisdictions with the exception of the 1985 South Hills Planning Study. Recent agreements on the urban growth boundary mark progress in regional planning.

The need for regional infrastructure planning is substantial. The updated transportation plan should work off of the sustainability Measures of Effectiveness established in the GHASP effort. In particular, the new transportation plan should more thoroughly address greenhouse gas emissions, livability, mobility and community health issues on a regional basis. The approach to prepare the Greater Helena Area Transportation Plan follows:

**5.1 Project Management** - Provide coordination and management of the planning process, develop and monitor schedules, work plans, budgets, progress reports and project communications. Facilitate and drive the project to be completed on time and within budget.

**5.2 Gather Information** – Gather the background information required for this planning effort.

**5.3 Existing Conditions** – Define existing conditions for transportation in the region. Focus on livability, safety, and mobility of residents, access and circulation for commerce, and the regional movement of freight and goods. The following will be included:

- A. Policy Framework
- B. Inventory
- C. Safety Analyses
- D. Sustainability Analysis
- E. Mobility Analysis
- F. Commerce Analysis
- G. Measures of Effectiveness

**5.4 Phase I Public Involvement** – Conduct public outreach as described previously. The same TAC that informs the transit planning effort will be assembled for the development of this plan. Initial meetings will focus on information gathering, listening and issue identification.

**5.5 Needs Assessment** – Conduct a comprehensive review of region wide transportation needs with the following activities:

- A. Regional Linkages
- B. State & Regional Needs
- C. Commercial Needs
- D. Economic Development
- E. Community Development

**5.6 Master Street Plans** – Develop a conceptual master street plan for each town in the planning area to achieve the sustainability goals identified by the GHASP. A general development standard will be derived for each functional street type, i.e. arterial, collector and residential, based on the individual community’s vision and needs.

**5.7 Area Plans** – Develop conceptual development plans for each neighborhood area and community based on the needs assessment and Master Streets Plans for the following communities:

- A. Townsend
- B. Toston
- C. Radersburg
- D. Montana City
- E. Clancy
- F. Jefferson City
- G. Boulder
- H. Counties
- I. East Helena
- J. Helena and Helena Valley

**5.8 Transportation & Land Use Alternatives** – Evaluate and compare the Measures of Effectiveness (MOE) for each of the land use alternatives developed in the GHASP Housing Plan. Compare these to the MOE’s of the existing system.

**5.9 System Performance** - Use the Transit Plan service analysis to review existing operations and recommend improvements with the following activities.

- A. Inventory
- B. Safety Analyses
- C. Sustainability Analysis
- D. Measures of Effectiveness
- E. Findings

**5.10 Phase II Public Involvement** - Conduct public outreach as described previously. Second meeting presents results of analysis and responds directly to issues presented in the first set of meetings.

**5.11 Modal Plans & Management Plans** – Develop detailed modal and management plans or update existing plans based on the results and information developed in this planning effort. The following will be included:

- A. Transit Plan
- B. Transportation Demand Management Plan
- C. Non-Motorized Transportation Plan
- D. Parking Plan

**5.12 Recommended Improvements** – Develop a list of improvement needs for each transportation system and geographic area.

- |  |                            |
|--|----------------------------|
| <b>A.</b> Transit System                   | <b>E.</b> Towns and Cities |
| <b>B.</b> Non-Motorized System             | <b>F.</b> Helena           |
| <b>C.</b> Transportation Demand Management | <b>G.</b> Counties         |
| <b>D.</b> Transportation System Management | <b>H.</b> State Highways   |

**5.13 Financial Plan** – Conduct a detailed financial analysis that develops budgets for operations, maintenance and capital improvement costs and funding. The following will be included:

- |                       |                         |
|-----------------------|-------------------------|
| <b>A.</b> Background  | <b>D.</b> State Funding |
| <b>B.</b> Funding     | <b>E.</b> Local Funding |
| <b>C.</b> Federal Aid |                         |

**5.14 Implementation Strategies** – Develop an implementation strategy to recommend to the Consortium Group. The following will be included:

- |                            |                              |
|----------------------------|------------------------------|
| <b>A.</b> Policy Framework | <b>C.</b> Coordination       |
| <b>B.</b> Funding          | <b>D.</b> Goals & Objectives |

**5.15 Draft Plan** – Produce a draft plan with comments by the Stakeholders Group, TAC and Consortium Group prior to publication. (Phase II Public Involvement includes for a public hearing on this.)

**5.16 Final Plan Adoption** – Produce a final plan responding to public comments and direction from the Stakeholders Group and Consortium Group.

## **6. Project Implementation Schedule**

A detailed Work Plan for this project can be found in Appendix B GHASP will start immediately upon hearing news of receiving grant monies in January 2012. Delivery dates are:

- |  |  |
|--|--|
| <b>A.</b> Aligning Growth Policies - December 2012 | <b>C.</b> Transit Plan - January 2014        |
| <b>B.</b> Sustainable Housing Plan - June 2013     | <b>D.</b> Transportation Plan - July of 2014 |

Regular partner dialogues and structured peer exchange in the form of nine open houses, 36 monthly web postings, and ten newsletters.

## **7. Capacity Building**

### **7.1 External Capacity Building**

As the first regional plan in Montana it is important to share the use of successful models to other communities. This requires definitive evidence of which policies work and why. A plan for public dissemination of GHASP information is a crucial part of the implementing strategy. The Project Implementation Team, including both consultants and staff members, will write a white paper on the effectiveness of each strategy and data collection method. This information will be shared at the Montana Association of Planners, the Montana Joint Engineers Conference, and the American Public Works Association Annual Montana Conferences, Montana League of Cities and Towns, Montana Association of Counties. It is important that both the public and private sectors in Montana learn from this proto-type regional plan. Capacity building will take place during and after the completion GHASP.

## **7.2 Internal Capacity Building**

There are 160 hours allocated for training GHASP. This includes 80 training hours for Planning Directors and 80 hours for Senior Planners and Engineers combined. These trainings are critical to learning how to work together to develop regional plans as well as how to use the extensive data collected.

**A. Planning Directors** – There are four Planning Directors in the project area. One for each County and one for the City of Helena. Each will have 20 hours of training. Trainings will include:

- Regional Plan Development Training to occur at GHASP initiation.
- Landscape Based Suitability Analysis Training (using GIS to identify constraints) to occur after the GHASP Housing Plan.

**B. Planning and Engineering Staff** – There are 12 people who fall into this category with in the GHASP area. There are three for each County and the City of Helena. They will each have six hours of training.

- Land Landscape Based Suitability Analysis Training (using GIS to identify constraints) to occur after the GHASP Housing Plan.

## **IV) Match, Leveraging Resources, and Program Integration**

There are many community, public sector, private sector, and other resources that will be combined with HUD's program resources to achieve program objectives. Because of the page limit in the appendix, letters of support for this grant are not included. However letters were collected and are available upon request. Instead we have included a signed letter from Sharon Haugen, the Planning Director for the City of Helena. This letter attests to other letters of support and lists the groups that are eager to participate in this effort as well as their contact information. The letter can be found in Appendix D. Please contact them or us if you need further verification.

Rocky Mountain Development Council is a key player in this effort. They are a nonprofit 501(c)(3) human resources development council that has become particularly successful at developing and helping low-income people and seniors find affordable housing in all three counties in the project area. As part of their mission they will donate in-kind services. However, because their level of effort is undefined, it is not included in this grant as a match.

The City of Helena will contribute \$35,000 in funds to this effort and \$30,439 in-kind. The other Consortium members will also contribute \$30,439 in in-kind staff hours. The total local match for this grant application is 34% of the total GHASP cost. In the letters of support from the Consortium Group, the in-kind match is verified.

## **V) Achieving Results**

Our goals for GHASP are ambitious. The political landscape is tenuous and fraught with obstacles. Funding for GHASP is essential to formalize a nurturing partnership between the Consortium members, as it is well beyond the means for them to conduct this level of planning effort. The successful GHASP will:

- A.** Create partnerships that last. Our benchmark for success is the establishment of a Regional Planning Council that evolves out of the Consortium Group.
- B.** Demonstrate a new way to plan for compact, affordable and sustainable housing suitable for rural areas. This model can be used across the state of Montana and rural states.
- C.** Create a lasting regional Transit Management Association for the three county area.
- D.** Result in policy changes that plan for a sustainable future with a focus on funding to create vibrant communities. This includes policies for community development, transit service and infrastructure.
- E.** Provide the planning necessary for housing developments that are affordable, livable and accessible to the elderly.
- F.** Focus existing transportation infrastructure funding on building sustainable communities.