



The American Planning Association's
Professional Institute
**American Institute
of Certified Planners**

Scope of Work: **Helena Urban Standards Boundary Workshop**

APA: American Planning Association
CPAT: Community Planning Assistance Team
APA Contact: Ryan Scherzinger
County Contact: George Theborge, AICP
CPAT Leader: Joanne Garnett, FAICP
Scoping Visit: July 30, 2014
Full Team Visit: TBD

PROJECT SUMMARY

As described in the CPAT Application to APA, the "Helena Urban Standards Boundary Workshop" project consists of organizing and holding a workshop to bring together stakeholders to further implement the 2009 Memorandum of Understanding (MOU) between the City of Helena and Lewis and Clark County, in order to help mitigate development impacts while facilitating new development within the Urban Standards Boundary in a responsible manner.

The workshop will accomplish the following:

- Look at opportunities and challenges in the extension and upgrade of public infrastructure and alternative means of financing them to facilitate compact development close to Helena,
- Explore neighborhood character and use patterns in adjacent portions of the county that is in the designated growth areas to determine suitable zoning for those areas of the city and county, and
- Investigate existing and needed design standards to ensure that new development will meet annexation requirements and be sustainable.

BACKGROUND

Lewis and Clark County grew by approximately 17 percent in population from 2000 to 2013, and nearly two-thirds of that growth has occurred in the unincorporated areas of the county. Over 8,000 residential lots have been added to the Helena Valley region, again with most of them being outside city limits.

Scattered housing developments throughout the unincorporated areas exist on individual wells and septic systems. Additional concerns connected to the developments are the location of housing on top of the valley groundwater aquifers, potential for insufficient roadway capacity, strains on the local school district, and safety issues. The provision of public utilities and services has also become increasingly less cost-efficient as high density development occurs further away

Chicago office
205 N. Michigan Avenue
Suite 1200
Chicago, IL 60601-5927
p 312.431.9100
planning.org

Washington, D.C. office
1030 15th Street, NW
Suite 750 West
Washington, DC 20005-1503
p 202.872.0611

Lee Brown, FAICP
President, APA's Professional Institute,
The American Institute of Certified Planner

James M. Drinan, JD
Executive Director

from Helena's city limits. Lastly, a patchwork pattern of annexation has occurred because the City has agreed to annex adjacent developments when their septic systems and/or wells fail. This, in turn, can result in city neighborhoods surrounded by unincorporated areas and vice versa.

As a result of these issues and more, the 2009 MOU directed the City and the County to evaluate existing and future development to avoid having to retrofit subdivisions with City sewer, water, and other services. The City designated an Urban Standards Boundary to cover adjacent county properties suitable for future connection to City utilities and for annexation. However, a master plan is needed to guide these processes and delineate the standards to accomplish the goals of the MOU, as well as the development methods to promote compact development.

The 2009 MOU and the joint application to the CPAT program demonstrate the City of Helena and Lewis and Clark County's commitment to implementing smart growth solutions to address development patterns in the valley. The goals of the CPAT are to create a shared vision and set a direction for the coordinated development of land within the Urban Standards Boundary of Helena. To the extent possible, the team of volunteers from around the country, i.e., the CPAT, will comprise expertise in urban planning, public facilitation, landscape architecture, real estate development, and infrastructure. Their role is to evaluate constraints and opportunities for pursuing and achieving compact development in the Boundary area and facilitate a workshop of key stakeholders to further implement the 2009 MOU. The workshop is intended to investigate opportunities and challenges of extending or upgrading public infrastructure and financing those improvements. The CPAT's engagement with stakeholders will explore neighborhood character and land use patterns to help determine suitable zoning for the study area. The CPAT will review existing design standards and recommend additional elements needed to ensure that new development meets City requirements and sustainable principles.

Lewis and Clark County submitted an application for technical assistance from APA in December 2013. APA accepted and decided to move forward with the project in February 2014. The CPAT shall be comprised of planners who provide pro bono planning assistance and will be selected for the skills that match this project. The time and expertise of the CPAT members and that of APA staff shall be provided pro bono. Lewis and Clark County is responsible for all other costs associated with the project, including airfare, ground transportation, hotel, food and drink, supplies, and other incidentals as deemed necessary. APA will invoice the County once following the preliminary visit and a second final invoice after the full team's visit.

In July 2014, Ryan Scherzinger from APA and Joanne Garnett, FAICP and Team Leader, made an initial visit to the area in order to tour the valley and meet with city and county representatives. The full CPAT will return to Montana in the coming months (dates TBD) and will conduct a stakeholder workshop in a concerted effort to reach the project goals described above.

SCOPE SUMMARY

The CPAT will visit Lewis and Clark County for approximately five days. During those days, the CPAT will dedicate their activities to fulfill the scope of work as described below, with an emphasis on local assessments, best practices analyses, stakeholder workshops, and public outreach.

The tasks that follow are intended to be accomplished through the combined efforts of the CPAT and County and City staff. Tasks include, but are not limited to the following:

Task 1: Existing Conditions Materials | City/County staff

City/County staff will supply all information regarding demographics, infrastructure, Capital Improvement Plans, aquifer map, base maps, subdivision regulations, applicable State Statutes that impact local government planning, county and city growth policies, a map locating subdivisions in the Urban Standards Boundary, annexation policies, related planning documents, and any other material that describes the existing conditions in the Helena Valley.

Task 2: Memorandum of Understanding (MOU) | CPAT & City/County staff

CPAT members will review the MOU and conduct a preliminary assessment of next steps needed for its full implementation. Information about previous attempts to implement the MOU and lessons learned from those efforts (for example, the work of the Development Standards Working Group) will be shared by City/County staff.

Task 3: Assessment of Development Constraints | CPAT

The CPAT will review local road capacity, water and sewer availability, rural fire protection, school enrollments, groundwater, and other items identified by City/County staff as constraints to local development.

Task 4: Stakeholder List | City/County staff

City/County staff will compile a list of participants that includes a broad representation of elected and appointed officials, developers, neighborhood associations, school district, fire and safety, citizen groups, and others.

Task 5: Media Relations | City/County staff with assistance from CPAT

Examples include posting updates on city and county websites, social media, press releases, interviews, and community calendar postings.

Task 6: Orientation Tour | City/County staff

City/County staff will facilitate a tour of the Helena Valley for CPAT members, focusing on key areas that will provide background for later discussions.

Task 7: Interviews | *City/County staff with CPAT input*

City/County staff will schedule one-on-one (and small groups, where appropriate) interviews with key City and County staff members and key stakeholders for additional background.

Task 8: Summary of Findings | *CPAT*

The CPAT will prepare an analysis of opportunities and constraints to pursuing compact development within the Urban Standards Boundary. The summary will describe best practices for achieving the desired results of the MOU and begin to develop action steps and measures of success.

Task 9: Stakeholders Meeting | *CPAT & City/County staff*

City and County staff will arrange the location and notification to the stakeholders. The CPAT will create the agenda with City/County staff approval. The workshop will help the CPAT: (a) understand and establish the common ground shared by participants, as well as philosophical differences that need to be bridged; (b) find areas of consensus; (c) have open discussions about financial implications; (d) bolster support for compact development; and (e) establish an overall commitment to implementing the MOU. The workshop provides a forum for participants to: analyze public infrastructure and its financing; consider community design standards needed to achieve the goals of a shared vision; and study land use to identify locations where zoning changes may be needed.

Task 10: Meeting Assessment | *CPAT*

The CPAT will compile their observations from the meeting and focus on identifying areas where general agreement on potential solutions exist and what items need a resolution in order to move forward.

Task 11: Process Development | *CPAT*

The CPAT will conduct an analysis of all background materials, consider best practices, and draw from their collective knowledge to determine next steps to successfully implement the MOU and recommend standards for future Urban Standards Boundary expansion. The CPAT will present a draft summary of the results to staff for discussion and modification as necessary.

Task 12: Implementation Strategies | *CPAT with City/County staff input*

Upon general agreement about the findings in Tasks 10 and 11, the CPAT will outline action steps to provide a framework and a recommended timeframe for implementing the MOU. Topics will include: joint planning for infrastructure extension and financing; the annexation process; design standards within the Urban Standards Boundary; zoning recommendations; and other items as identified by the CPAT.

**Task 13: Preliminary Report Presentation | CPAT**

The CPAT will present their findings and recommendations for implementation to the Stakeholders and elected officials for additional feedback.

Task 14: Final Report | CPAT

The CPAT will prepare a final document that includes:

- Summary of key findings of Tasks 1-13
- Identification of action steps and timeframes
- Recommended design standards for Urban Standards Boundary area
- Infrastructure financing tools
- Incentives and funding sources for development
- Additional topics as identified by this assessment

Major Deliverables by the CPAT

- Summary of initial findings (Task 8)
- Facilitation of Stakeholders Meeting (Task 9)
- Written assessment of meeting (Task 10)
- Draft process development (Task 11)
- Strategy identification (Task 12)
- Preliminary report presentation (Task 13)
- Final report document (Task 14)

Tentative Timeframe

- ~~January~~ ^{February 1 through February 14} 2015 – CPAT visit to Helena Valley. Stakeholders meeting held, and preliminary report outlined.
- ~~January~~ ^{February} 2015 – Presentation of draft results to stakeholders and elected officials
- **Spring 2015** – Submittal of final CPAT report

Please read and sign below.



I, George Theborge, AICP (Planning Director, Lewis and Clark County), as the primary community contact for the Helena Urban Standards Boundary CPAT Project hereby attest that I understand the scope of work as outlined above. I understand the joint effort required to complete the scope of work and commit the resources of the local persons mentioned in the outlined tasks (i.e., City of Helena and Lewis and Clark County staff). I understand the CPAT's right to alter the scope of work as needed to fulfill the primary objectives of the overall project. I understand our obligation to cover all direct costs of the project (for CPAT volunteer members and APA staff), which will include: airfare, ground transportation, hotel accommodations, food and drink, supplies, and any other direct costs associated with the project. 6

George Theborge, AICP
Planning Director, Lewis and Clark County, MT