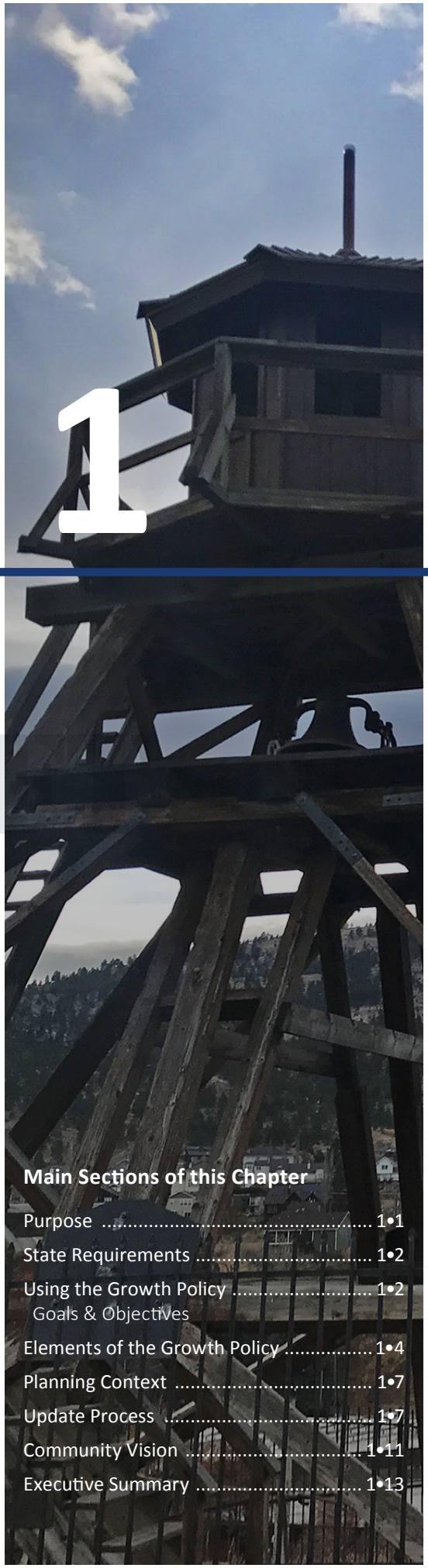
Introduction 1



Purpose

This Growth Policy is the objectives foundation for the City of Helena, helping guide, in coordinated fashion, decision-making across a wide range of topics toward specific, desired outcomes. It serves multiple needs and functions, including:

- **Legislative** – This plan meets requirements of 76-1-601, MCA, Montana's Growth Policy statute, and promotes consistency of implementing regulations;
- **Community intent** - This plan articulates community intent, expressed as objectives regarding matters of interest to the general public, private enterprise and local agencies. This offers a degree of predictability for all who rely upon or interact with the City;
- **Service provision** – This plan facilitates coordinated, timely and efficient provision of public facilities and services;
- **Educational** – This plan helps inform residents, agencies, and economic interests regarding Helena's demographics, needs, priorities and objectives;

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Main Sections of this Chapter

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- **Orderly growth** – This plan provides a means to guide annexation, allowing logical expansion of the city and the efficient, economic provision of public services.

The City's budget, capital facilities plans (CFP), transportation plans and service standards are all based on and should be consistent with Growth Policy objectives. Other plans, including parks plans, downtown plans and subarea plans also tie back to this document, providing more highly detailed plans for action. This Growth Policy is also intended as an instrument to help maintain sustainable conditions for the community, recognizing a wide range of objectives and actions within local control and addressing emerging conditions associated with regional and global climate change.

In accordance with Federal civil rights law and as a matter of policy, the City of Helena strives to provide equal opportunity for all residents regardless of circumstance.

State Requirements

This Growth Policy is based upon Montana law (76-1-601 MCA) and serves as the basis for the City of Helena's zoning and subdivision regulations and other City Codes. It may be used to guide decisions related to City budgeting, the capital improvements program (CIP) and annexation. This Growth Policy is intended to be reviewed and updated every five years as required by Montana law (76-1-601 (3)(f)).

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Topical coverage in this growth policy correspond to requirements as described in Montana law. This document does not provide the level of detail to serve as an infrastructure plan described in 76-1-601 (4) (c) MCA.

Any City action intended by this Policy is subject to Commission approval and financial constraints.

Using the Growth Policy

Towns and cities generally employ two types of instruments to guide and enact legislation. Though each is intentionally distinct, they must be well-coordinated and complementary:

- Policy Documents – Such as this Growth Policy, to set direction;
- Regulatory Documents – Such as zoning or development regulations, to implement objectives.

As a policy document, this Growth Policy does not hold legal sway over City activities or automatically extend into land-use regulation. Instead, growth policies are used to guide and help determine implementation mechanisms, such as zoning and subdivision regulations. Typically, growth policies serve as a long-term statement of land use and do not

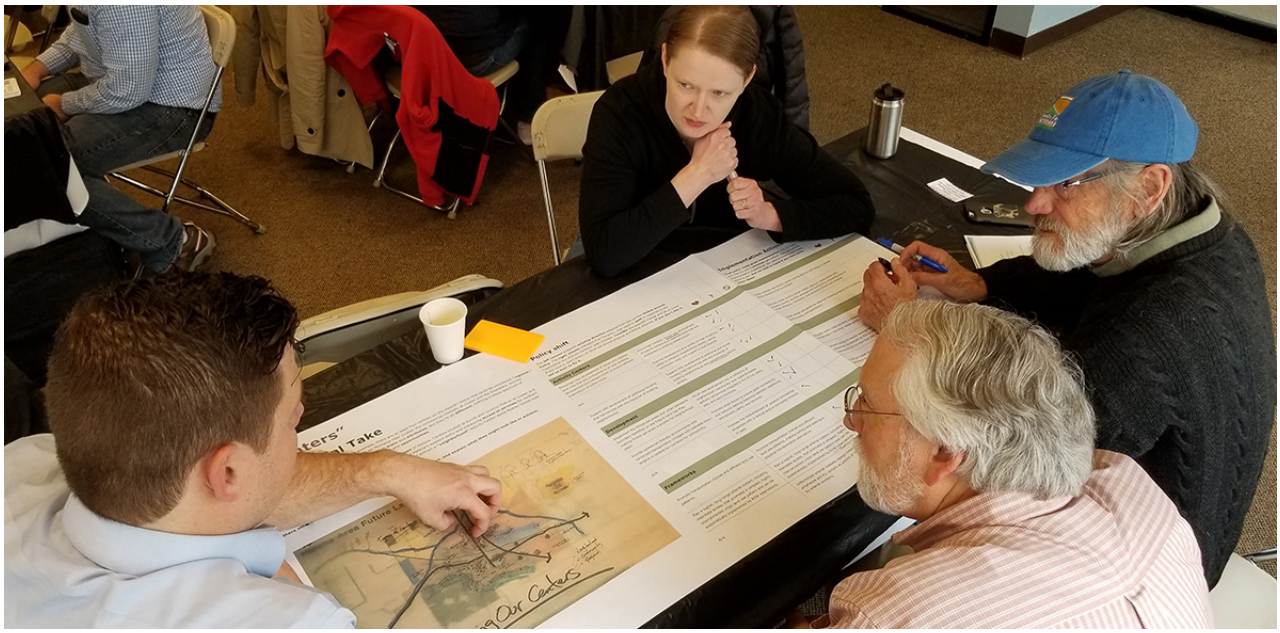

Figure 1.01 – *The update process reviewed and updated the 2011 Growth Policy's objectives framework, explored by chapter topic. New strategies to shape the character of developing areas were also included. (Image: SCJ Alliance, Inc.)*

have immediate effect on land use. The growth policy anticipates future changes of some existing land uses, presenting a generalized picture of an area's dominant land use character and trends and can reflect the transition of an existing land use to a new one. The growth policy attempts to show how current trends and logical progressions in land uses can be managed over a relatively long timeframe.

In contrast, the zoning ordinance reflects the growth policy and regulates land development and the use of established zoning districts. The zoning map is a parcel-specific statement reflecting boundaries and present and proposed uses of lands. As a legal statement, the zoning map has immediate force and effect.

Given the relationship between the growth policy and zoning, the zoning map should not be a copy of the future land-use map. Because the growth policy's future land-use map is generalized, it is not intended to show the location of small-scale land uses. The growth policy does, however, contain information and policies (objectives) that can help determine specific rules and decisions about the location of individual land-use proposals.

In cases where the growth policy recommends a land use designation that differs from the existing land use or zoning, it is appropriate to let the existing zoning or use remain, provided that the zoning is gradually revised over time to phase in the desired future land use pattern.

Other regulatory documents include subdivision regulations to guide the division of land, the extension of water, sewer and streets, and the acquisition of parkland. City codes address a variety of requirements, such as infrastructure, lighting, noise, and building, which can be established to implement the growth policy.

Additional steps may be essential, including development of implementing studies, plans, simple inventories, or updates to create consistency between the growth policy and regulatory documents. In addition, this document's actions table should be reviewed by the Planning Board on an annual basis to evaluate progress.

Goals & Objectives

Goal and objective statements are typically expressed in written form, but may also exist as maps or diagrams, such as in land use mapping. Other charts and supporting information are provided to show conditions or projections that shaped plan objectives.

This plan's use of the terms “Goal” and “Objective” largely track those provided in the Montana Growth Policy Resource Book, but add a third category – “Action” – to articulate more specific, task-oriented implementing steps. For purposes of this document, these three key terms are defined as:

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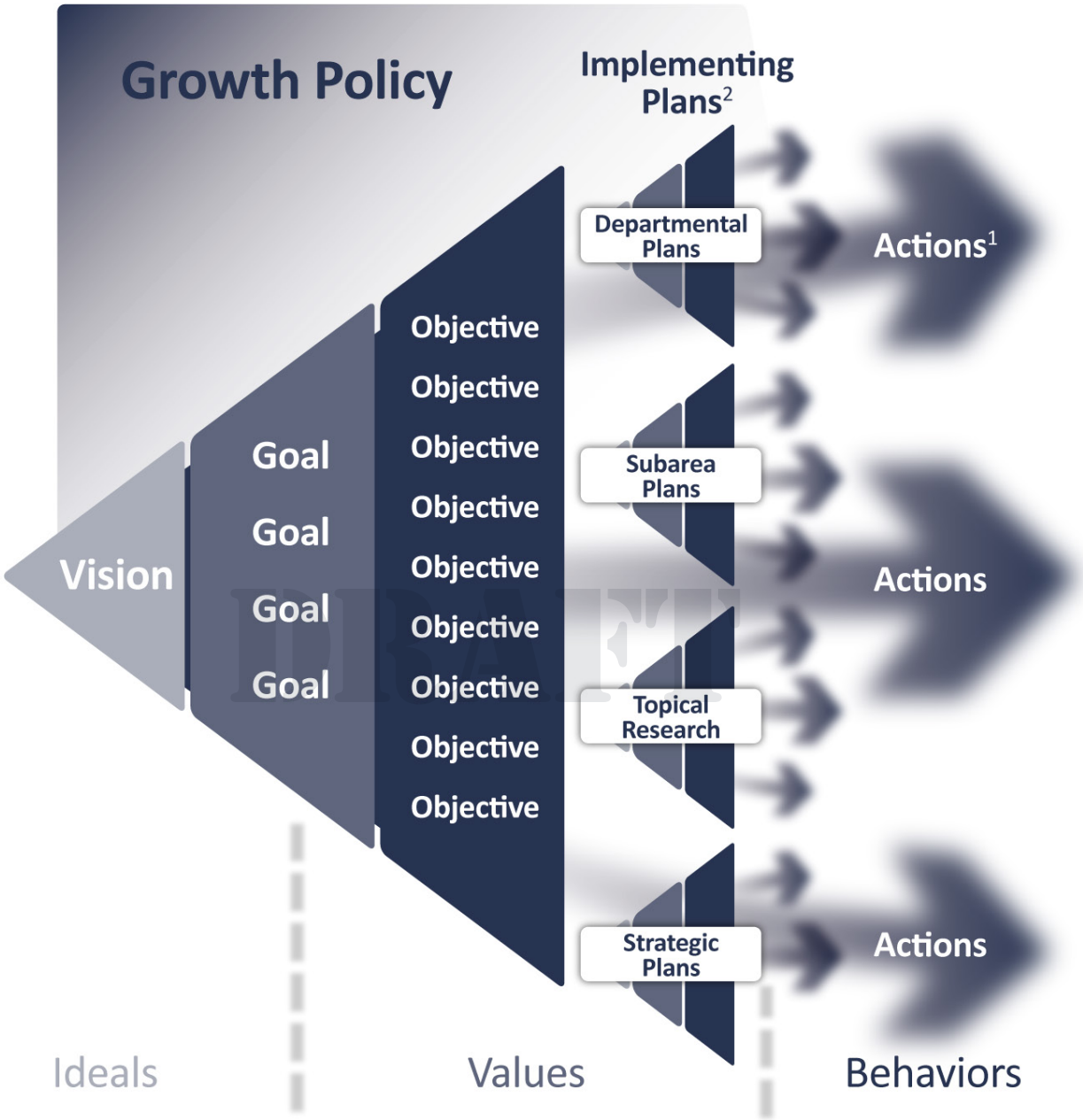
- **Goal** – Broad statements indicating a general aim or purpose to be achieved. A goal is a direction setter, an ideal future end, condition, or state related to the public health, safety, or general welfare toward which planning and implementation measures are directed;
- **Objective** – An objective is a topic-specific statement providing guidelines for current and future decision-making. It indicates a clear commitment of the local legislative body. An objective is an extension of a plan’s goals, reflecting topical nuance as well as an assessment of conditions;
- **Action** – Actions are budgetable steps envisioned or undertaken to implement plan objectives. Actions may include the development of more detailed and localized plans, work to implement objectives, formal agreements, regulations or other strategies.

Figure 1.02 illustrates how the above features are related, flowing from vision through increasingly defined goals, objectives and various types of implementing plans and actions the City may undertake.

Elements of the Growth Policy

The following is a list of the elements (chapters) included in the Helena Growth Strategy. Each features a topical focus; articulates conditions and



[1] *Actions include programs, capital investments, regulations, etc.*
[2] *Examples only. Implementing plans may include a wide variety of plan types*

Figure 1.02 – *Growth Policies are organized as tiered systems, expressing community desires from broad-brush ideals (vision) through specific action items the City may lead (actions). Other types of plans are sometimes prepared to identify or help implement actions, taking vision, goal and objective cues from the growth policy. (Image: SCJ Alliance, Inc.)*

key objectives the community intends to address, and references relative objectives and action items from the full objectives framework.

1) Introduction – Including a brief description of the plan, its purpose and components, and the community vision.

2) Population & Economy – Presents an overview of economic and demographic conditions for Helena, introducing goals and objectives that promote a healthy economic future for the city.

3) Land Use – Providing an overview of existing development patterns and trends, descriptors for land use types keyed to a Future Land Use Map, and land-use related goals and objectives from the plan's overall objectives framework.

4) Housing – Providing summary information regarding housing conditions and needs in Helena, plus all housing-related goals and objectives from the framework.

5) Public Facilities & Services – Outlines conditions regarding water, wastewater treatment, police and fire protection, parks, schools, library, and other related services. Lists services-oriented goals and objectives.

6) Transportation – Describes the community's transportation infrastructure, identifies priorities and lists transportation-related goals and objectives.

7) Natural Environment – Describes natural resources and hazards in Helena, framing the subsequent listing of goals and objectives designed to protect such features.

8) Community Culture & Design – Describes key districts, cultural assets and other features tied to Helena's quality of life and civic identity. Lists related goals and objectives.

9) Coordination & Implementation – Describes the various ways the City coordinates with other agencies regarding land use decisions and service provision. Introduces key implementation tools at the City's disposal, and lists a range of actions and activities needed to implement the plan's goal and objectives framework.

10) Subdivision Review – Per Montana Code Annotated (MCA) 76-1-601, defines and describes review criteria for subdivision proposals.

This document also includes appendices including (A) the overall goal and objectives framework, and (B) the Downtown Neighborhood Plan (referenced as an adopted part of this document).

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Planning Context

This growth policy bases much of its objectives framework on population and growth rate forecasting, working to anticipate and provide for such growth in ways that support overall community goals.

Population projections are made for each county in Montana by the Montana Census and Economic Information Center.[1] Lewis and Clark County's population is projected to grow from 66,290 people in 2017 to 72,056 people in 2040 based on projections at the county level. While official projections are not made for the City of Helena itself, this plan assumes that the ratio of city population to county population (45.8%) will remain the same in 2040 as it was in 2017, suggesting the population of the City of Helena will to increase from 30,345 in 2017 to 32,989 persons by 2040.

This forecast provides a working target for City plans regarding land and service demands, future revenue estimates, and budgeting priorities. Other trends, such as housing and employment growth, are described in corresponding elements.

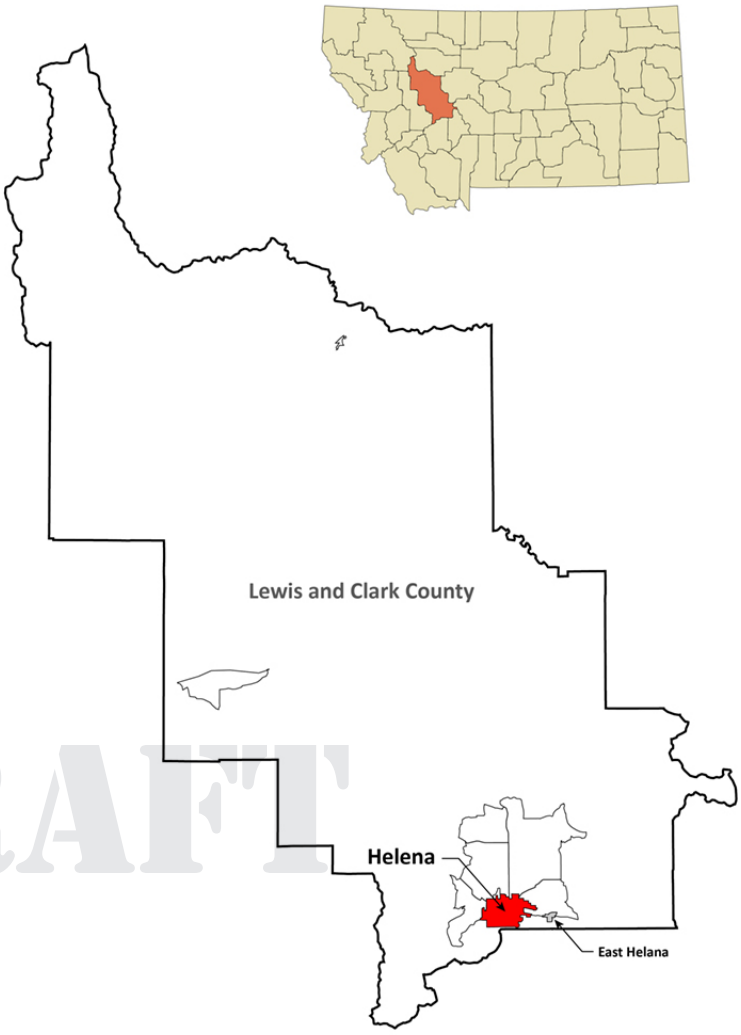

Figure 1.03 – *Vicinity map, City of Helena. (Image: SCJ Alliance, Inc.)*

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Update Process

The City of Helena has participated in several comprehensive planning processes since the 1960s. The City's first official Growth Policy was adopted in 2001, and amended in 2008. Led by progress and evolving conditions, a more detailed plan was developed and adopted in 2011, which provided the foundations for this 2019 update.

Plans from other Montana agencies and City departments were also reviewed and, as relevant, incorporated into this document, including the:

- 2004 Lewis and Clark County Growth Policy;

1 *https://ceic.mt.gov/Maps/Demographics/Population*

- 2015 Helena Valley Area Plan;
- 2014 Greater Helena Area Long Range Transportation Plan;
- 2018 Downtown Helena Master Plan;
- City of East Helena Growth Policy;
- 2014 Helena Tri-County Region Comprehensive Economic Development Strategy;
- 2018 Tri-County Housing Needs Assessment, and others.

Focus groups, surveys, and community workshops were used to shape and guide development of this plan. Table 1.01 details many of the activities used to engage the Helena community in developing this current update.

Community Vision

The following pages provide Helena's Community Vision, providing a foundation for the goal and objectives framework.

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Table 1.01 - *Public Engagement Summary*

Orientation Interviews
Consultants began the update process with a two full days of orientation interviews, conducted with several residents, business owners, and representatives from public service providers and civic organizations. Results of these conversations established an initial understanding of relevant topics and issues the planning process would need to address and resolve.

Working Group
The City convened a growth policy working group, drawing members from the City and County planning board, zoning commission, agency staff, the development community, and community organizations. This group worked with the consultant team and City staff to review results from the public engagement process and draft materials as they were developed throughout the policy's update. They met six times to discuss community priorities and the full spectrum of policy recommendations. The group offered suggestions and refinements, discussing the implications of the proposed new growth policy and the conditions under which they believe they could succeed.

The working group's advice and recommendations shaped the growth policy's goals, objectives, and implementation proposals. Members took a pragmatic look at the growth policy's ideals, helping to refine them into action steps that more closely fit the community's ability to put them in place.

Project Website
The City provided a web page within its website to make available project information. The page featured a project calendar, process results, and links to related projects and information. The site also included a link to the City's Facebook™ page and other social media channels, encouraging public participation at various planning events and public comment on the plan's direction.

Storefront Studio
The City hosted a four-day "storefront studio" on the pedestrian mall downtown, with consultants and staff on-hand to speak with the public and integrate public comments and suggestions into plan policy and strategy. The studio was open to the public each of the four days, with more than 100 people visiting the displays, speaking with the planning team, and commenting on ways in which the plan might address their hopes and concerns. The studio was also converted into a gallery for First Friday, welcoming the public as part of the community's celebration of the arts.

Results showed that topics such as downtown revitalization, resource conservation, open space preservation, small-town quality of life transportation system safety, housing availability, and a hope that Helena's neighborhoods continue to be vital are important to the community. As a result, the growth policy evolved to reflect these ideals, refining the vision, goals, and strategic framework to respect these and other community priorities.

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Vision Workshop
At the conclusion of the studio's first day, the City hosted a community workshop to review, evaluate and refine the vision from the previous version of the growth policy. While most of the ideals found in the earlier plan still seemed relevant and on target, participants were eager to incorporate a more closely-tailored story for the community's neighborhoods and in helping the city develop more character-rich places and features.

Implementation Workshop
At the studio's conclusion, the City hosted a Saturday afternoon workshop presenting recommended shifts to growth policy goals and objectives and suggested implementation actions to achieve them. The workshop, working from the preferred planning direction developed in the studio, presented an integrated policy framework identifying necessary shifts, asking for participant comment and refinements. This information propelled preparation of the updated growth policy, including those action items participants endorsed.

Mini-poll
The City sponsored a "mini-poll" to probe the community's values and priorities related to the growth policy. The questionnaire was available on the City's website, at the storefront studio, and was handed out in paper form throughout the process, presenting questions to gauge the community's general inclinations in how Helena should manage its growth. Mini-poll results paralleled direction voiced in the storefront studio and at later public events, indicating general preferences to enhance neighborhoods within the city, make housing more accessible to folks earning a living in Helena, support a variety of modes of travel, and support the success and prosperity of downtown.

Importantly, results confirmed that residents appreciate the fact that Helena includes many distinct neighborhoods – each with unique identities, characteristics, aspirations, and needs. Most residents also expressed appreciation for the overall quality of Helena's schools, helping them identify Helena as a true "home town" with excellent quality of life features.

Table 1.01 - *Public Engagement Summary* *(continued from pg.1•9)*

"Pop-up" Studios & Open Houses
The City sponsored two days of "pop-up" studios and two evenings of open houses, where the planning team visited local parks, schools and shopping centers to "bring the plan to the people." Visitors had an opportunity to learn about the growth policy's proposals, the trade-offs implied in policy shifts, and the new community vision. Conversations with passers by ranged across all of the growth policy's topics and resulted in revisions and fine-tuning to the growth policy's recommendations. Open house participants considered and vetted the "neighborhood center" approach and offered support for increasing the complexity, intensity and land use diversity in identity-rich "nodes" at various places in town.

More than 100 people visited the pop-up studios and open houses during the two days.

Home Show & Farmers Market
In late March, City staff attended the annual two-day Home Show in support of the Growth Policy, exhibiting maps, the questionnaire and process materials for discussion. Helena Building Industry Association (HBIA) donated use of a booth for the event, allowing staff to engage city and county residents regarding the concept of a centers-based development pattern and other topics including annexations, infrastructure expansion, other planning efforts and the urban standards boundary (USB).

Staff also attended the Helena Farmers Market over the course of the summer, exhibiting maps, draft plan excerpts, and worksheets from the storefront studio. Other departments were also represented , presenting information on plan-related topics like downtown parking, park access, and open space.

Joint PC/CC Work Session
City staff and the consultant team presented the growth policy's conceptual recommendations at a joint work session with the working group and City Commission (CC) representatives. The group discussed the growth policy's vision, goals, objectives and implementing actions. During the conversations, the group worked through the detail embedded in several of the more significant recommendations, suggesting revisions as appropriate. The group agreed with the plan's emphasis on neighborhoods, connections to the surrounding open lands, continued collaboration with Lewis and Clark County, enhancement of the community's parks and open spaces, improvements to the non-motorized transportation experience, and the downtown's revitalization.

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Community Vision

The following vision statement is derived from goals contained in Helena's 2011 Growth Policy. Appropriately, it provides an aspirational, broad-brush summary of community objectives across a range of topics, providing anchor for this plan's objectives framework. It also includes language identified as "community values," describing ideals associated with a range of plan-related topics.

Vision

Helena celebrates its past, enjoys its present and is planning its future to ensure that its growth is beneficial, its environment is clean, and its economic stability assured while maintaining its outstanding natural setting, quality of life and sense of community.

The City of Helena strives to be a community recognized for:

- *A healthy, vital economy that benefits all;*
- *Quality municipal services;*
- *Balanced and beneficial growth;*
- *A world-class natural setting and recreational opportunities;*
- *Clean, safe and sustainable natural resources;*
- *A vibrant arts, cultural and civic environment;*
- *A vital, active downtown, rich in history and a source of intense community pride;*
- *Citizen involvement and engagement in all matters.*

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Community Values

Community: *Helena is a safe and secure place to live, work and play, with a stable and friendly environment that encourages citizen involvement.*

Leadership: *Helena values leadership that respects differing views, models integrity and implements community goals.*

Environment: *Helena is an environmentally aware community that preserves, conserves and appreciates its distinctive open spaces, natural resources, habitats, parks and outdoor recreation.*

Economic Development: *Helena encourages economic development that safeguards the environment, while promoting community prosperity.*

Diversity: *Helena is a community for all people, offering diverse cultural and educational opportunities, with varying land uses and unique neighborhoods.*

Accountability: *Helena is dedicated to promoting fiscal responsibility, managed growth, responsive community services and an open and fair government.*

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Executive Summary

This Growth Policy aims to optimize Helena's growth and change in multiple ways, strategically coordinated to ensure day-to-day decisions and implementing actions advance the community's long-term vision. The following paragraphs provide a high-level summary of the goals and objectives contained in the Goals and Objectives table (Appendix A), roughly associated by topic.

Population & Economy

For purposes of this plan, Helena expects relatively modest growth, projecting the population of the city to increase by approximately 3,000 persons by 2040. The city's aging population, roughly mirroring that of the region and the US, suggests economic strategies that leverage this trend, including supporting healthcare, service and housing policies. In this light, land use strategies such as the Neighborhood Centers concept introduced in Chapter 3 make additional sense. Other approaches supported by this plan include:

- *Additional economic "clustering", which encourages grouped location of allied business types, helping improve efficiencies and creating localized business dynamics;*
- *Land use and zoning patterns that provide businesses with ample locations situated near infrastructure, quality housing and basic resources;*
- *Sustaining the area's scenic, cultural and recreational attractions, keeping life here special and attracting new energies supporting growth and a robust regional economy;*
- *"Green" building and renewable energy investments, offering strong potential to provide jobs, reduce energy costs, and strengthen the community's sustainability.*

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Land Use

Two key concepts informing many, if not all of Helena's Growth Policy objectives revolve around focusing growth patterns within the city, promoting infill and advancing the Neighborhood Centers concept. These two concepts, putting development where infrastructure is already in place – has the potential to serve mid- to long-term needs ways that:

- *Promotes fiscal sustainability through reduced service costs;*
- *Helps preserve more of the area's open-space and recreational features;*
- *Enhances civic activity and character;*
- *Supports economic growth;*
- *Reduces vehicular miles traveled and improves transit viability;*
- *Boosts housing diversity, addressing demographic and economic demands;*

- *Accommodates Helena's growing population without relying on expansion into the surrounding countryside.*

Housing

Helena's housing-related objectives tie closely to its land use goals, seeking to improve both quality and affordability of housing by diversifying the city's housing stock. Infill and mixed-use concepts are also seen as critical to affordability by providing housing where basic needs are in close proximity – allowing residents the ability to lead a more social, less car-dependent lifestyle.

Public Facilities & Services

Public facility and service objectives in this Growth Policy are rooted in efficient, timely and cost-effective provision. As such, the City recognizes the inherent value compact land use strategies provide, seeking tight integration of service provision and desired growth patterns. In addition, this plan's objectives support:

- *Strategic investment, preferring incremental, targeted maintenance and system upgrades to help systems last longer, optimizing the investments the City makes in its infrastructure.*
- *Ongoing support for the parks and open space system, enhancing one of the key "identity" features of the city, encouraging active, social lifestyles and reinforcing what is special about Helena.*

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Transportation

An important principle in Helena's Growth Policy concerns arranging the transportation network to take full advantage of and facilitate land use complexity. This dictates a high degree of "connectivity," where blocks are shorter, street intersections more frequent, and street design accommodates shared use by multiple modes. The system envisioned in this Growth Policy provides opportunity for all to travel safely and efficiently, on-pace and in concert with demand and the community's long-term objectives. In addition, transportation objectives:

- *Recognize the tight relationship transportation function and design plays in the overall efficiency, beauty and value of the community, setting the stage for and supporting desired land use patterns.*
- *Seek to coordinate with parks system and open space planning, helping facilitate and activate existing and future trail networks.*

Natural Environment

This Growth Policy acknowledges the basic fact that Helena's natural environment has and will always provide both setting and sustenance for those that live here – insisting that residents and agencies alike maintain thoughtful, conservation-minded approaches to growth. Objectives in this plan set the stage for this, supporting work to balancing considerations

including air and water quality, outdoor recreation, energy conservation, hazard reduction, and habitat preservation with growth.

Community Culture & Design

Affirmed by scores of participants leading this update, objectives in this Growth Policy recognize the incredible value inherent in Helena's community culture and physical character. For this reason, objectives describe:

- *Land use patterns that add to local "livability," including the location, scale and access to schools, houses of worship, parks and open spaces, environmentally sensitive areas, medical facilities and other institutional uses;*
- *Ongoing support for a wide range of arts and cultural assets, educational and recreational opportunities;*
- *High aesthetic standards, including the preservation of the historic downtown as the spiritual "heart" of Helena;*
- *An engaged, fully-involved public, enhancing not only decisions made over time, but also encouraging residents to become an active part of the community's culture – carrying forward a legacy of contributions made by those living here since people first arrived in the area;*
- *Preservation of Helena's unique setting, which offers breathtaking views and ready access to outdoor recreation.*

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Coordination & Implementation

Another key theme enabling much of this Growth Policy concerns collaboration. Whether economic or land use policy, success with housing, effective service provision, optimized transportation, environmental stewardship or cultural growth, effective partnerships are essential. Helena – and the region at-large – is growing and evolving, with fresh challenges both immediate and long-term. Striking an appropriate, sustainable balance among all issues is a complex task, and it's one where collaboration is key. Helena's Growth Policy embraces this need, promoting collaborative efforts on numerous fronts and encouraging community involvement along the way.

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