

Request for Proposals

2025 Growth Policy Update/Land Use Plan Conversion

Community Development Department
316 North Park Avenue, Room 445
Helena, Montana 59623
406-447-8490





City of
Helena

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1 NOTICE

Notice is hereby given that the City of Helena, Montana, (approximate population of 34,000) is seeking proposals from qualified consultants to provide professional services for the review and conversion of the 2019 City of Helena Growth Policy into a Land Use Plan (LUP) in alignment with the Montana Land Use Planning Act (MLUPA) established during the 2023 Montana Legislative Session with passage of Montana Senate Bill 382. This will entail a general review and, where necessary, updates to elements of the Growth Policy, and, as part of the document conversion, introduction of newly required elements or statistical information, inclusive of future population and housing need projections for a defined 20-year period.

The selected consultant will work in close collaboration with City of Helena staff on this effort. The specific scope of work and deliverables expected are discussed in detail within this RFP.

2 AGREEMENT FOR SERVICES AND COMPENSATION

One consultant will be selected as the finalist and offered an opportunity to negotiate an agreement with the City. If an appropriate agreement cannot be reached with the highest-ranked consultant, the second-ranked consultant may be invited to negotiate an agreement with the City, and so on.

The City of Helena has not established a budget for the project and will instead base the final budget on the proposals submitted by qualified consultants. As part of consultant proposals, a project cost estimate must be submitted, detailing costs associated with required project tasks. A fee for services shall be agreed upon between the City and the highest-ranked consultant based on the scope of services proposed, and an Agreement for Professional Services entered into between the parties upon satisfactory agreement to the scope of services and an associated competitive budget.

3 SCOPE OF WORK AND DELIVERABLES

3.1 GENERAL SCOPE OF WORK

The selected consultant shall complete a 5-year review of the existing 2019 City of Helena Growth Policy, which was drafted (2019) and adopted (2020) in conformance with Section 76-01-601, Montana Code Annotated. As part of this effort, the consultant will then analyze the need for edits to the document to incorporate data, narrative, and maps required of a Land Use Plan as detailed in Montana Senate Bill 382, passed May 17, 2023, and known as the Montana Land Use Planning Act. MLUPA supersedes the requirements of MCA §76-01-601 and sets forth new required components of a comprehensive plan for jurisdictions of a certain population size, such as Helena. The selected consultant, with the assistance of City staff, as needed, will determine areas needing minor updates or the full incorporation of new components to the LUP to complete the update and conversion of the Growth Policy. Where there are new, recommended material edits

within the LUP, it is expected that new goals and outcomes will be established and accompanied by a specific policy or policies to be implemented upon adoption of the LUP.

The City maintains substantial data down to the parcel level and will provide all maps and data sets needed throughout this process through the City's Planning Division staff and/or the City-County GIS Department. The City will also provide the selected consultant with copies of all relevant plans as needed including any neighborhood plans as well as infrastructure and transportation plans.

3.2 PLANNING EFFORT COLLABORATION AND COORDINATION

There are various planning efforts underway that the City envisions the need to collaborate and coordinate with various consultants and/or City/County staff. Collaboration and coordination is paramount so that the duplication of planning efforts is kept to the absolute minimum while ensuring all efforts are maximizing their set-aside project budgets. Part of this collaboration and coordination will be to coordinate schedules and timing of plan completion. Collaborative and coordinated planning efforts should include:

1. Joint City/County Infrastructure Study (*County lead—RFP to be issued imminently*)
2. Long Range Transportation Plan (*larger MPO designation efforts – City lead*)
3. Lewis and Clark County Growth Policy Update (*County lead*)
4. Sixth Ward/Railroad District/Midtowne Neighborhood plan (*City lead*)

3.3 LAND USE PLAN CONTENTS

The LUP must contain the following, at a minimum, as required by Section 9 of Montana Senate Bill 382 from the 2023 Legislative Session:

1. Inventories and descriptions of existing conditions of housing, local services and facilities, economic development, natural resources, environment, and hazards, and land use within the jurisdictional boundaries of the LUP
2. A description, map, and analysis of how the City will accommodate its projected population over the next 20 years and the expected impacts of the development in the areas of housing, local services and facilities, economic development, natural resources, environment, and hazards.

Inventories and descriptions in the plan must be based on up-to-date surveys, maps, diagrams, charts, descriptive material, studies, and reports necessary to explain and supplement the analysis of each section of the LUP, with demographics provided by:

1. The most recent decennial census or census estimate of the United States census bureau; and
2. Population projections for a 20-year period based on permanent and seasonal population estimates as outlined in Section 9(4), SB 382.

Information pertaining to required LUP elements follows below.

3.3.1 Housing

The LUP must identify and analyze existing and projected housing needs for the projected population of the City and provide regulations that allow for the rehabilitation, improvement, or development of the number of housing units needed, as identified in the LUP and future land use map, including:

1. A quantification of the jurisdiction's existing and projected needed housing types, including location, age, condition, and occupancy required to accommodate existing and estimated population projections;
2. An inventory of sites, including zoned, unzoned, vacant, underutilized, and potential redevelopment sites, available to meet the City's needed housing types;
3. An analysis of any constraints to housing development, such as zoning, development standards, and infrastructure needs and capacity, and the identification of market-based incentives that may affect or encourage the development of needed housing types; and
4. A detailed description of what actions the City may take to accommodate the projected needed housing types.
5. If, after performing the analysis required herein, it is determined that the total needed housing types may not be met due to lack of resources, development sites, infrastructure capacity, or other documented constraints, the City shall establish the minimum number of housing units that may be rehabilitated, improved, or developed within the jurisdiction over the 20-year planning period and the actions the City may take to remove constraints to the development of those units over that period.

3.3.2 Local Services and Facilities

The LUP must:

1. Determine the existing and anticipated levels of public safety and emergency services necessary to serve the projected population of the City, including law enforcement, fire protection, emergency management system agencies, and local health care organizations;
2. Contain an inventory and map of existing fire protection, law enforcement, and emergency service areas and anticipated response times, a description of mutual aid or cooperative service agreements, and the location of hospitals or clinics in the City;
3. Identify capital and service improvements for fire, law enforcement, emergency services, and health services for the City necessary to meet the projected population;
4. Determine the existing capacity, existing deficiencies, planned expansion, and anticipated levels of utility services necessary to serve the projected population in the City, including water, wastewater, and storm water systems, solid waste disposal, and other utility services, as identified by the City;
5. Contain an inventory and map of all utility service areas, system networks, and facilities;
6. Identify local utility capital and service improvements for the City necessary to meet the projected population;

7. Determine the existing capacity, existing deficiencies, planned expansion, and anticipated improvements to the transportation network serving the City necessary to serve the projected population in the City;
8. Contain an inventory and classification map of all existing and planned roads within the City, including major highways, secondary highways, and local routes, all non-motorized routes, including bike lanes and pedestrian thoroughfares, and all public transit systems and facilities; and
9. Identify planned capital and service transportation improvements necessary to serve the projected population.
10. This analysis requires coordination with school districts within the City to determine the existing capacity of, planned expansion of, and anticipated improvements necessary for the local K-12 school system to serve the projected population in the City, inclusive of a request that the local school district provide any inventory and maps of existing K-12 educational facilities within the City and identification of any capital and service improvements necessary to meet the projected population.
11. The City may include an analysis of existing capacity and service levels, planned expansions of, and anticipated improvements necessary to provide other services to the projected population in the City.

3.3.3 Economic Development

The LUP must:

1. Assess existing and potential commercial, industrial, small business, and institutional enterprises in the City, including the types of sites and supporting services needed by the enterprises;
2. Summarize job composition and trends by industry sector, including existing labor force characteristics and future labor force requirements, for existing and potential enterprises in the City;
3. Assess the extent to which local characteristics, assets, and resources support or constrain existing and potential enterprises, including access to transportation to market goods and services, and assess historic, cultural, and scenic resources and their relationship to private sector success in the City;
4. Inventory sites within the jurisdiction, including zoned, unzoned, vacant, underutilized, and potentially redeveloped sites, available to meet the City's economic development needs;
5. Assess the adequacy of existing and projected local facilities and services, schools, housing stock, and other land uses necessary to support existing and potential commercial, industrial, and institutional enterprises; and
6. Assess the financial feasibility of supporting anticipated economic growth in the City.

3.3.4 Natural Resources, Environment, and Hazards

The LUP must:

1. Include inventories and maps of natural resources within the City, including but not limited to agricultural lands, agricultural water user facilities, minerals, sand and gravel resources, forestry lands, and other natural resources identified by the City;

2. Describe the natural resource characteristics of the City, including a summary of historical natural resource utilization, data on existing utilization, and projected future trends;
3. Include an inventory, maps, and description of the natural environment of the City, including a summary of important natural features and the conditions of and real and potential threats to soils, geology, topography, vegetation, surface water, groundwater, aquifers, floodplains, scenic resources, wildlife, wildlife habitat, wildlife corridors, and wildlife nesting sites within the jurisdiction; and
4. Include maps of, identify factors related to, and describe natural hazards within the City, including flooding, fire, earthquakes, steep slopes and other known geologic hazards and other natural hazards identified by the City, with a summary of past significant events resulting from natural hazards that includes:
 - a. A description of land use constraints resulting from natural hazards;
 - b. A description of the efforts that have been taken within the local jurisdiction to mitigate the impact of natural hazards; and
 - c. A description of the role that natural resources and the environment play in the local economy

3.3.5 Land Use and Future Land Use Map

1. A LUP must include a future land use map and a written description of the proposed general distribution, location, and extent of residential, commercial, mixed, industrial, agricultural, recreational, and conservation uses of land and other categories of public and private uses, as determined by the local government.
2. The future land use map must reflect the anticipated and preferred pattern and intensities of development for the jurisdiction over the next 20 years, based on the information, analysis, and public input collected, considered, and relevant to the population projections for and economic development of the jurisdiction and the housing and local services needed to accommodate those projections, while acknowledging and addressing the natural resource, environment, and natural hazards of the jurisdiction.
3. The Future Land Use Map and the written description must include all items outlined under Section 14(4) of SB 382.

3.3.6 Implementation

The implementation section of the land use plan must include:

1. An analysis of whether any inconsistencies exist between current zoning regulations and the LUP and future land use map, including a map of the inconsistencies. If inconsistencies exist, the City shall identify:
 - a. Specific implementation actions necessary to amend the zoning regulations and the zoning map to bring the zoning regulations and zoning map into substantial compliance with the LUP and future land use map;
 - b. A schedule for amending the zoning regulations and zoning map to be in substantial compliance with the LUP and future land use map, in accordance with the deadlines;
 - c. A schedule for adopting a capital improvements program or for amending an existing capital improvements program to be in substantial compliance with the LUP and future land use map;

- d. A schedule for expanding or replacing public facilities and the anticipated costs and revenue sources proposed to meet those costs, which must be reflected in a jurisdiction's capital improvement program;
- e. If applicable, a schedule for updating the plan for extension of services required in §7-2-4732 to be in substantial compliance with the LUP; and
- f. A schedule for implementing any other specific actions necessary to achieve the components of the LUP, including a timeframe or prioritization of each specific public action; and
- g. Procedures for monitoring and evaluating the City's progress toward meeting the implementation schedule.

3.4 CONSULTANT RESPONSIBILITIES

The selected consultant will be responsible for the following project items:

1. Providing both draft and final LUP documents.
2. Conducting data gathering, developing goals and objectives, and assisting in formulating implementation strategies, as needed, to update existing plan elements and/or draft new sections of the LUP.
3. Providing a community engagement strategy, to include anticipated or proposed opportunities for solicitation of input from the community in alignment with the City's Public Participation Plan. This will include the creation of, or assistance in the creation of, a project-specific website to keep the community apprised of project activities and allowing for public comment collection.
4. Facilitating public meetings as part of the public engagement process.
5. Ensuring integration with adopted City plans and policies.
6. Coordinating with City staff on the creation of project branding and a project webpage.

3.4.1 Anticipated Meetings

There will be meetings with City staff, elected or appointed officials, stakeholders, and the general public that the selected consultant will be required to attend and—in most cases—facilitate. In some instances, two (2) or more of these meetings may be combined into a single day in order to save on travel expenses. The final number of meetings will be determined once the process for the LUP update has been decided between staff and the selected consultant, and will be reflected in the final scope of work and implementation timeline for the project. An anticipated list of required meetings is as follows:

1. Initial meeting with City Staff to discuss project methodology.
2. Introductory meeting with the Planning Commission to discuss goals and process.
3. Presentation of final LUP document to both the Planning Commission and City Commission.
4. Public Engagement Meetings driven by the goals and objectives for public engagement as outlined in the Public Participation Plan. For example:
 - a. Neighborhood/community meetings
 - b. Working Group
 - c. Focus Group

- d. Work Sessions:
 - i. Planning Commission
 - ii. City Commission

3.4.2 Public Engagement Process

The City of Helena is in the process of adopting a Public Participation Plan, as required under Senate Bill 382, a draft of which is available upon request to prospective consultants and available on the City's Community Development Department webpage. It requires an inclusive and transparent planning process with wide ranging public input through a robust engagement effort. As part of this effort, City staff will establish a working group of key government and external stakeholders to help guide the LUP conversion effort. In addition to the key working group, several focus groups will be established to provide subject matter expert perspectives on matters such as housing and local services. It will be City staff's responsibility to meet and facilitate these group discussions and provide the consultant with comments from these key stakeholders. The chosen consultant will work with City staff to assist in preparing meeting materials and establishing facilitation methods but will not be required to attend the meetings.

3.5 PROJECT DELIVERABLES

The consultant will provide editable digital copies of all preliminary draft LUP documents to the City, and the final LUP shall be provided as three (3) hardcopies and one editable digital file. All documents shall be provided to the City at least 20 (twenty) working days before any public meetings or hearings with Helena City officials. Upon conclusion of the contract, all data and working documents will be provided to the City of Helena in Microsoft Word, Adobe PDF, or .mxd file formats on an external hard drive.

All draft and final documents delivered to the City of Helena must comply with the Americans for Disability Act. Documents that will be posted online shall be screen reader friendly with the most recent WCAG guidelines.

3.6 PROGRESS UPDATES

The selected consultant will be expected to submit progress reports to City staff monthly throughout the project. These reports should detail recent work completed, upcoming tasks and deadlines, upcoming meetings, and any issues that have arisen that might impact project scope or timeline.

4 RFP SUBMITTAL REQUIREMENTS

All submitted proposals must be in the format specified within this RFP. Five (5) hardcopies must be submitted in a sealed envelope that is clearly labeled with the RFP title, company name, and consultant contact person. An electronic copy of the proposal must also be included with the submission.

Proposals must be received no later than 5PM (MST) on November 16, 2023. Late submittals will not be accepted for review, and it is the sole responsibility of consultants to ensure timely

submission to City Community Development Department Planning Division staff. Following close of the RFP submission window, City staff will convene an evaluation committee to thoroughly review qualified proposals and inform the top candidate(s) of the need to complete a formal interview.

Digital copies of proposals may be submitted to: citycommunitydevelopment@helenamt.gov.
Hardcopy proposals may be submitted to:

City of Helena Community Development Department
316 N. Park Avenue, Room 402
Helena, MT 59623

Proposals may be withdrawn either personally or by written request at any time prior to the due date stated above for receiving proposals. The City is not responsible for costs associated with preparing proposals in response to this RFP.

5 RFP OUTLINE AND CONTENTS

5.1 PROPOSAL SUBMISSION

The proposal submission must be:

- No more than 50 single-sided bound pages, inclusive of a cover page and back page;
- No smaller than 12-point font;
- Responsive to all required information noted within this RFP; and
- Signed by an authorized agent.

5.2 PROPOSAL ELEMENTS

The proposal must include, at a minimum, the following elements:

- Cover Page
 - Table of Contents
- Statement of Non-discrimination.
- Project Summary
 - The general process and methodology that will be used;
 - General schedule of the project;
 - Outline of services to be provided; and
 - A description of how the proposed scope of work will be achieved.
- Major Tasks Outline

- Break down the project’s major phases with a timeline for each phase, including anticipated hours for each phase by project team member.
- Company Description (not to exceed 4 pages)
 - Include a brief history of the company and highlight the relevant work experience, with particular emphasis on those of a similar scope/scale (note: may include projects currently underway).
- Project Team (not to exceed 4 pages)
 - A list of company employees assigned to this project, credentials for each, and referencing relevant work experiences.
 - Anticipated work areas for each project team member.
- References (Not to exceed 4 pages)
 - Submit a minimum of 3 references from governmental entities (to include municipal, county, state, or tribal governments), providing the following for each:
 - Name of Entity/Agency
 - Contact name, title, phone number, and e-mail
 - Project name, start/end dates
 - Summary of project
 - Links to work products completed, where available
- Total Costs and Expenses
 - Provide a spreadsheet with total costs for the entire scope of work and services performed, inclusive of printing, travel, and staff time, etc., and a requested payment schedule.

6 PROJECT SCHEDULE AND TIMELINE

Once a consultant has been selected and a contract negotiated, the anticipated project timeline is up to 18 months to create a draft ready for presentation at a public hearing. Public hearings required for adoption of the LUP may necessitate draft document changes, which will be the responsibility of the consultant for incorporation into the final document. The City anticipates going to a public hearing before the Planning Commission in summer 2025 with City Commission final approval no later than late fall 2025.

7 RFP PROCESS SCHEDULE

Publication of RFP	October 5, 2023
Last Day to Submit Proposal	November 16, 2023
Evaluation of Proposals	November 21, 2023

Notify Consultant of Interviews	November 22 2023
Interview of Top Consultant(s)	November 19–December 1, 2023
Notification of Selected Consultant	December 4, 2023
Negotiation of Contract	December 5–December 19, 2023
Project Commencement	December 20, 2023

8 SELECTION CRITERIA AND SCORING

A committee comprised of City staff as well as both elected and appointed officials will review all submitted proposals and score them based on the following criteria. Submittals that do not meet the minimum requirements set forth in this RFP will not be considered. Once scoring is complete, City staff will contact the finalists to arrange interviews.

Personnel Qualifications	25 maximum
Organizational Capacity	15 maximum
Related Experience	20 maximum
Quality of Proposal	20 maximum
Local Knowledge	15 maximum
Present and Projected Workload	5 maximum
Proposal Total Score	100 Points maximum

9 QUESTIONS AND INQUIRIES

All inquiries, questions, or requests for additional information related to this RFP must be directed to Chris Brink, Community Development Director, by calling (406) 447-8445 or e-mailing cbrink@helenamt.gov.

10 NON-DISCRIMINATION

The City of Helena is an Equal Opportunity Employer. Discrimination in the performance of any agreement under this RFP on the basis of race, color, religion, creed, sex, age, marital status, national origin, actual or perceived sexual orientation, gender identity, or disability is prohibited. This prohibition shall apply to the hiring and treatment of the selected entity's employees and to all subcontractors as applicable to this process.

As noted in Section 5.2 of this RFP, consultants are required to include a statement addressing non-discrimination based on the above criteria. Please note that any professional services contract awarded by the City will contain such a provision.

11 RESERVATION OF RIGHTS BY THE CITY

The City reserves the right to reject any or all proposals, to readvertise, to waive any irregularities in the proposals, and to accept the proposal that best benefits the City. The City reserves the right to reject any and all responses deemed unqualified, unsatisfactory, or inappropriate.

12 PUBLIC RECORDS DISCLOSURE

All proposals become the property of the City of Helena and may be subject to release to the public pursuant to Mont. Const. art. II, §9 and Mont. Code Ann. §2-6-1001 et. seq.

13 LOBBYING

Prospective consultants are prohibited from lobbying the City Commission, the Mayor, or members of the selection committee relative to the consultant's proposal in response to this RFP.

The City of Helena is committed to providing access to persons with disabilities for its meetings, in compliance with Title II of the Americans with Disabilities Act and the Montana Human Rights Act. The City will not exclude persons with disabilities from participation at its meetings or otherwise deny them the City's services, programs, or activities.

Persons with disabilities requiring accommodations to participate in the City's meetings, services, programs, or activities should contact the City's ADA Coordinator, Ellie Ray, as soon as possible to allow sufficient time to arrange for the requested accommodation, at any of the following:

(406) 447- 8490

TTY Relay Service [1-800-253-4091](tel:1-800-253-4091) or 711

citycommunitydevelopment@helenamt.gov

316 North Park Avenue- Room 445, Helena, MT 59623