

**SOUTH BILLINGS BOULEVARD TAX INCREMENT FINANCING ASSISTANCE
APPLICATION**

Project Name: Newman Lane Community Unification Project
Date Submitted: 1/20/21

APPLICANT INFORMATION

1. Name: Newman PTA
2. Address: 605 South Billings Blvd
3. Telephone Number: 406-281-6215

PROJECT INFORMATION

1. Building Address: 605 South Billings Blvd
2. Legal Description: Public School Building
3. Ownership: Public Building
4. Address: 605 South Billings Blvd
5. If property is not owned by the Applicant, list leasehold interests (Attach evidentiary materials.)

Lessor's Name: NA

Lessor's Address: NA
6. Existing/Proposed Businesses: Elementary School
7. Business Description: School
8. Employment: Existing FTE jobs Approximately 35
9. New Permanent FTE jobs created by project 0 Construction FTE jobs 0
10. Architectural Firm: Good Earth Works Co / Lilac Designs
Address: 4215 Hwy 312 Billings, MT
Representative: Jeff Spooner

See Attachment A

8. Description of Project: See Attached

9. Rehabilitation/construction plans: See Attached

See Attachment B

Project Schedule:

January 2021 – Planning & Fundraising

February 2021- Application Submitted

March 2021- Approval of plans, applications, and final steps

April 2021 – June 2021 – Construction

July 2021 – Project Completed

CRITERIA FOR REVIEW

Materials contained in TIF Assistance applications are used to assess the merits of projects in relation to the goals and objectives of the South Billings Urban Renewal Master Plan and in relation to other District development and urban renewal projects. Projects will be evaluated based on the following criteria.

1. **Relevance to the South Billings Urban Renewal Master Plan** – This document is available on SBURA’s website (www.southbillings.org).
2. **Economic Stimulus** – The amount of economic activity to be generated by the project.
3. **Tax Generation** – The increase in taxable value due to new construction/rehabilitation as estimated by the County Assessor’s office.
4. **Employment Generation** – Total employment generated by the project assessed in terms of new permanent and part-time jobs, and construction jobs.
5. **Elimination of Blight** – The project’s direct and indirect impact on the physical and fiscal condition within the District.
6. **Special or Unique Opportunities** – The extent to which the project represents a unique opportunity, meets a special need, or addresses community goals. The provision of public space or workforce housing are examples of special and unique opportunities.
7. **Impact Assessment** – The extent of both positive and negative environmental impacts, appropriateness of the project design, and impact on existing businesses or residents.
8. **Financial Assistance** – Other forms of financing available to the Applicant i.e. lender participation and state and federal grant monies,
9. **Project Feasibility** – Demonstration of market demand for the project

10. **Developer's Ability to Perform** – Applicant's capability to undertake the relative complexities of the project based on past performance on similar or comparable projects.

11. **Timely Completion** – The feasibility of completing the project according to the Applicant's project schedule.

PROJECT COSTS

Land and Site Improvements (Itemized)

1. Equity in Land and Buildings	\$ Publicly held school grounds
2.	\$ _____
3.	\$ _____
4.	\$ _____
Subtotal	\$ _____

Construction/Rehabilitation Costs (or attach separate statement)

See Attachment B

1.	\$ _____
2.	\$ _____
3.	\$ _____
4.	\$ _____
5.	\$ _____
6.	\$ _____
7.	\$ _____
8.	\$ _____
Subtotal	\$ _____

Fees

1. Architectural design/Supervision	\$ _____
2. Permits _____	\$ _____
3. Other fees _____	\$ _____
Subtotal	\$ _____
Total Project Development Costs	\$ _____

PROJECT FINANCING

Please complete Sources of Funds detail and summarize below.

Developer Equity

Cash Invested	\$ _____ 6000.00 _____
Land & Buildings	\$ _____
Other (Specify) _____	\$ _____
_____	\$ _____
Subtotal	\$ _____ 6000.00 _____

Cash in bank at 12/31/20 = \$9,100
This is an unmatched grant.

Lender Commitments (Attach evidence i.e. Letters of Credit or other documentation.)

Lender	Loan Amount	Interest	Term	
_____ na _____	\$ _____	_____ %	_____ yrs	\$ _____ /Month
_____ na _____	\$ _____	_____ %	_____ yrs	\$ _____ /Month
Total Loan Amount				\$ _____

DEVELOPER STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY

Applicant

1. Name: _____ Newman PTA _____

Address: _____ 605 South Billings Blvd _____

2. If the applicant is not an individual doing business under his/her own name, the applicant has the status indicated below and is organized or operating under the laws of _____ State of Montana Parent Teacher Association _____.

3. The applicant is:

_____ A corporation.

_____ x _____ A nonprofit or charitable institution or corporation

_____ x _____ A partnership known as _____ Parent Teacher Association _____

_____ Other (explain): _____

Date of organization: _____ Approximately 1960 _____

4. Names, address, title of position (if any), and nature and extent of the interest of the officers and principal members, principal shareholders, investors, or partners of the applicant.

Name and Address

Nature and Extent of Interest

_____ Kerry Schillinger _____

_____ President _____

_____ Marissa Cook _____

_____ Vice President _____

_____ Kathy Bentley _____

_____ Secretary _____

_____ Kelphen Tolkar _____

_____ Treasurer _____

Financial Condition

1. Provide a current financial statement for each private entity involved in the project. Documentation of financial capacity may include net worth statements, balance sheets, or profit and loss statements. See Attached

See Attachment A

2. Has the applicant or any individual or entity affiliated with the development of this project been adjudged bankrupt, either voluntary or involuntary, within the past ten years?
No Yes If yes, give date, place, and under what name:

3. Has the applicant or any individual or entity affiliated with the development of this project been indicted for or convicted of any felony within the past ten years:
No Yes If yes, give date, charge, place, court and action taken for each case.

CONSTRUCTION CONTRACTOR

1. Identify the construction contractor or builder who will undertake this project.

Name: _____ Good Earth Works Co / Lilac Designs _____

Address: _____ 4215 Hwy 312 Billings, MT _____

2. Has such contractor or builder ever failed to qualify as a responsible bidder, refused to enter into a contract after an award has been made, or failed to complete a construction or development contract within the last ten years?

No Yes If yes, explain.

CERTIFICATION

I (we), Newman PTA (Newman Lane Committee)
(please print), certify that the statements and estimates within this Application as well as any and all documentation submitted as attachments to this Application or under separate cover are true and correct to the best of my (our) knowledge and belief.

Signature _____

Signature _____

Title _____

Title _____

Address _____

Address _____

Date _____

Date _____

GLACIER 49 Commons Loop
FAMILY OF BANKS Kalispell, MT 59901

FDIC

Date 12/31/20 Page 1
Primary Account XXXXXXXXXXXX5017

*****AUTO**5-DIGIT 59101
133615 0.6002 AV 0.389 323 1 283

PTA MONTANA CONGRESS
NEWMAN SCHOOL PTA
605 S BILLINGS BLVD
BILLINGS MT 59101-4708

***** CHECKING ACCOUNTS *****

Account Title: PTA MONTANA CONGRESS
NEWMAN SCHOOL PTA

Effective December 7th we have updated our policy to allow funds from deposits made by a mobile device available to you on the same day you make the deposit under normal circumstances.

OTALLY FREE BUSINESS CHECKING		Number of Enclosures	1
Account Number	XXXXXXXXXXXX5017	Statement Dates	12/01/20 thru 12/31/20
Previous Balance	9,204.68	Days in the statement period	31
Deposits/Credits	.00	Average Ledger	9,121.13
Checks/Debits	110.00	Average Collected	9,121.13
Wire Charge	.00		
Interest Paid	.00		
Ending Balance	9,094.68		

----- Activity in Date Order -----				
Description		Withdrawals	Deposits	Balance
7 CHECK	3523	60.00-	.00	9,144.68
9 DBT CRD 1102 12/09/20 56895768		20.00-	.00	9,124.68
CRUMBL				
OREM	UT			
Card# 7110				
1 DBT CRD 1127 12/11/20 83624269		30.00-	.00	9,094.68
SQ *CLASSY N SASSY COF				
Billings	MT			
Card# 7110				

----- Summary by Check Number -----	
Check No	Amount
3523	60.00

Notes missing check numbers

Newman Lane Community Unification Project
Newman Elementary School
2020-2021

Project:

Born from the desire to support our entire community and nourished through the commitment and dedication of caring individuals, our Newman Lane Community Unification Project has been developed to enhance our entire neighborhood. The initial catalyst that sparked this drive came from the desire to provide parents and families at Newman Elementary with a more comfortable and practical area in which to safely drop off and pick up their students after school. As highlighted in the description below, this project has matured into a vision that will both assist our Newman students and families as well as creating a platform for neighborhood/community unification.

Safety:

With our school located on South Billings Blvd, which is heavily trafficked and a major truck route, maintaining the safety of our students and families is always a top priority. In addition, there is no parent parking on the west side of the school building. Given this geographic challenge, parents drop off and pick up their children along the east boundary of our school on Newman Lane. While this is a safer option, the area creates a variety of other challenges that we plan to address through this project.

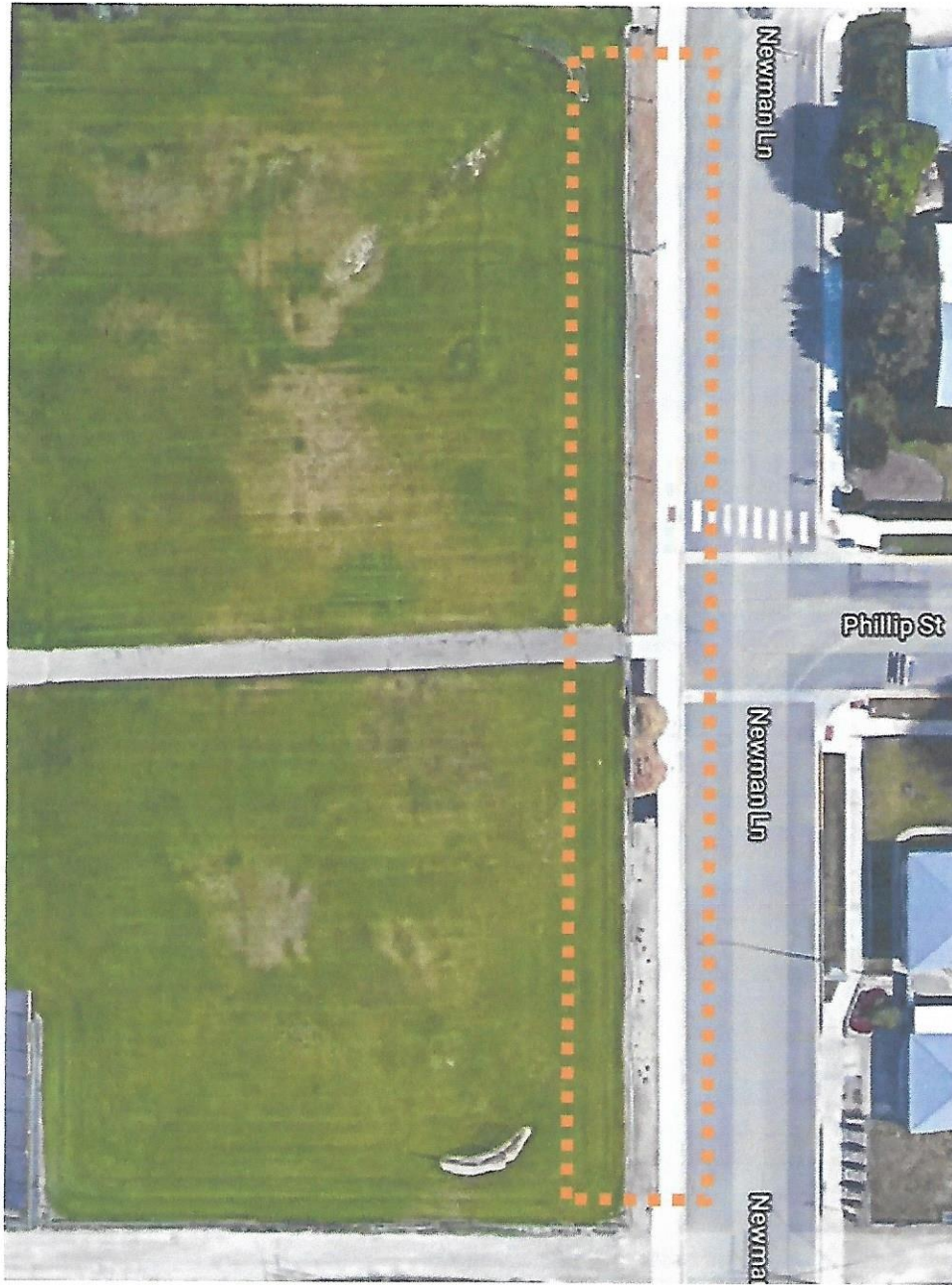
Plan:

As discussed above, our Newman Lane Community Unification Project will address a variety of different needs while improving our surrounding community. Our plan is to work collaboratively with our PTA, a variety of community groups, the City of Billings, and local businesses to raise the resources necessary to complete this project. Through these generous contributions, we will be able to upgrade our sidewalks, provide benches and space for families to safely gather, construct a community sign to welcome all, and plant mature trees for shade and curb appeal.

Overhead View



Project Area



Newman Lane Current Conditions



Newman Lane Traffic & Safety Concerns



As discussed above, our Newman Lane Community Unification Project will address a variety of different needs while improving our surrounding community. Please see the table below that highlights our plans, purpose and rough cost estimates for this project.

Newman Lane Community Unification Project

<u>Plan</u>	<u>Purpose</u>	<u>Rough Cost Estimate</u>
New concrete between the fence and the sidewalk	To provide a maintenance free, clean, and safe surface.	\$10,000
New fencing	To match the other upgrades and to provide a clearly marked perimeter for safety.	\$6,000
Six large and mature trees, three spaced on each side of the walkway	To provide natural shade for parents waiting to pick-up students and for families / friends who are viewing practices, events, or casual play in the grass field or on the playground.	\$8,000
Bench seating	Seating for parents, families, students and others utilizing the space.	\$6,000
Permanent garbage receptacles	To assist in keeping the space clean	\$1,200
Landscaping	Bushes, shrubbery and other landscaping to beautify the space.	\$5,000
Customized welcome archway	Archway located at the entry to the space will welcome all, promote community pride, and provide a space to thank donors and contributors to the project.	\$5,000
Welcome Pavilion and Community gathering space	Provide an outdoor area for the community to gather.	\$20,000
Total Cost of Project		\$61,200