



Memorandum

To: Historic Preservation Officers
From: Kate Hampton, CLG Coordinator
Craig Mrock, Grants Contracts Coordinator
Date: December 19, 2019
Re: CLG Grant Application for 2020-2021

For this grant cycle, we will continue the semi-annual and final reporting/reimbursement cycle to help reduce some of the reporting requirements and to provide a better system for summarizing CLG activities for the National Park Service. Please note the corresponding schedule below.

Note: Quarterly requests for reimbursement, not to exceed half of the total grant, can continue to be submitted, as long there is sufficient cash and in-kind match for the amount requested (40% of the total federal share). **Please remember to provide sufficient documentation to determine the allowability of the charges reimbursed, including pay stubs, invoices, donated services forms with original signatures, and other supporting documents.**

Requests to reimburse the full amount of funding can be submitted with the six-month progress report, as long as sufficient activity, cash, and in-kind match has been documented.

2020-2021 Schedule – Dates to Remember

| | |
|---------------------------|---|
| December 19, 2019 | Announcement of Funds |
| February 14, 2020 | CLG Grant Applications Due to SHPO |
| Upon Receipt and Approval | SHPO Mails CLG Agreements for Signatures |
| March 20, 2020 | Both Signed Agreements to SHPO |
| April 1, 2020 | 12-Month Funding Cycle Begins |
| September 30, 2020 | Mid-Point of Funding Cycle |
| October 30, 2020 | Six-Month Progress Report & Request for Reimbursement due |
| March 31, 2021 | Funding Cycle Ends |
| April 30, 2021 | Final Progress Report and Request for Reimbursement due |

Grant for 2020-2021:

As of this writing, the US Congress has not appropriated this federal fiscal year's budget. However, we anticipate offering annual grants for the same amounts as the previous funding cycle. That means if you received \$5500 last year, you may apply for \$5500 again this year. Those who received \$1500 last year can apply for \$1500 this year. However, until the US Congress has finalized the appropriation, the CLG grants are subject to increase or decrease. Enclosed you will find the annual grant application that MT SHPO offers for certified CLGs.

CLG Program Grant Application Due: Friday, February 14, 2020

CLG Application Notes and CLG Reminders:

1. Remember annual CLG training is required. At least one person from each CLG's preservation program must attend a SHPO-approved training between April 1, 2020 and March 1, 2021.
2. The state mileage rate is **\$0.58** per mile. The lodging reimbursement rate is **\$94.00** per night plus taxes (may vary by location, check with SHPO for rates).
3. Volunteer time reimbursement rate is **\$22.42** (unless a person is volunteering their time in an official professional capacity; then they can record their regular professional services pay rate, **up to \$89.17/hr.**, in place of the volunteer rate).
4. Please attach a list of the historic preservation board members, their professional discipline or citizen membership, term (year ending) and contact information (include email addresses if available). Please notify us of any changes that have occurred. If you have new board members, please send us their current resume for our record.
5. Please continue submitting your meeting minutes with your progress reports. They have been very helpful with our reporting requirements. Agendas are helpful but not necessary.
6. In the Scope of Work, please tie your tasks to your local government's and/or historic preservation commission's Preservation Plan. If not, please explain why.
7. Contact Kate to see if we need a copy of your current Preservation Plan. These can be sent electronically.
8. Consider looking to other state and federal grants to supplement your program. Remember, the SHPO CLG grant cannot be used as federal match, or vice versa.

Annual CLG Program Funding

We anticipate 16 Montana communities enrolling in the CLG program this grant cycle. Each year, we are required by the National Park Service to pass-through at least 10% of our annual funding to CLGs. This coming year, we anticipate allocating \$81,781.00 to the CLGs. Investment in the CLG program is not only a wise use of our funds but crucial to preservation efforts in our state, and we will continue to look for opportunities to increase CLG funding.

We stress public outreach in the CLG program. Please continue your outreach programs and develop new ones to involve all ages in your community. Consider hosting a community roundtable to announce progress, events, and awards for your local historical and cultural groups, local government officials, and the public.

Please provide a copy of this correspondence to your CLG Board or Commission for their review and assistance. The application form requires a copy of your meeting minutes that confirm your application was discussed and approved by the Board/Commission.

Please verify the current Tax-ID for your organization, or the organization through which you receive your payments.

Guidelines for 2020-2021 CLG Grant Eligibility

CLG guidelines include the following:

1. CLG program grants must be matched on at least a 60/40 basis, cash and/or in-kind.
2. To qualify for the maximum 12-month funding level – \$5,500.00 – CLGs must have a Historic Preservation Officer working at least 80 hours per month. The local historic preservation program must have an established address, telephone number, and message retrieval system. (Hours may not be carried forward or back into another month.)
3. Maximum grant amount of \$5,500.00 can be used towards salaries, operating costs, and/or special projects. **Check with SHPO to ensure your proposed project qualifies for funding under the grant.** Minimum match is \$3,666.67, and match above minimum is always greatly appreciated.
4. CLGs must submit a Six-Month Progress Report and a Final Report, including meeting minutes, and Requests for Reimbursement that meet reporting requirements and are delivered on-time.
5. Unspent CLG funds revert to SHPO. Reverting funds may jeopardize the CLG's future funding.

For more guidance on administering CLG funds in Montana, please refer to the *Montana Certified Local Government Manual*, <https://mhs.mt.gov/Shpo/Communitypres.aspx>, as well as the NPS Historic Preservation Fund Grants Manual, http://www.nps.gov/preservation-grants/HPF_Manual.pdf.

Components of 2020-2021 Complete Grant Application

1. Completed CLG Application form, including:
 - a. Contact information
 - b. Scope of work
 - c. Detailed budget table
 - d. Sources of revenue/funding
 - e. Signed CLG and Commission form
2. List of current CLG Commission members (including contact information, i.e. email)
3. An electronic version of the Preservation Plan. Either a link to where the plan is available on the web or via email to Kate or Craig.
4. Copy of Tax ID/Employer Identification Number, if new.

If you have any questions regarding this application, please contact us:

CLG Financial Inquiries:
Craig Mrock
406-444-7768
craig.mrock@mt.gov

CLG Program Inquiries:
Kate Hampton
406-444-7742
khampton@mt.gov

Certified Local Government Grant Application

April 1, 2020 to March 31, 2021

Application Deadline

February 14, 2020

**Montana State Historic Preservation Office
PO Box 201202
Helena, MT 59620-1202
(406) 444-7715**

2020-2021 GRANT APPLICATION

CERTIFIED LOCAL GOVERNMENT PROGRAM

Certified Local Government: City of Missoula, MT

Address: 435 Ryman, Missoula MT, 59802

Contact Person: Emy Scherrer, Historic Preservation Officer

Tax ID: 81-6001293

Period of Grant Request: April 1, 2020 to March 31, 2021

Scope of Work: The National Park Service asks we grant funds to CLGs for kinds and levels of work that reflect increasing sophistication, skills, and roles by the Preservation Officers, in other words, tasks that reflect improvement in community thinking. For this section, please itemize regular work duties (not including special projects) – products or projects starting or completing, meetings to be attended, etc., and more specifically, ways in how the federal grant funds will help the local program to grow and develop. Please tie your tasks to your community's Preservation Plan.

If not, please explain.

☐ Check if Scope of Work is continued on additional pages.)

With a growing population and associated pressure for infill and new development, the City of Missoula is continuing to experience and respond to the need for integrating and fostering historic preservation related measures in a cross-disciplinary fashion. Although Missoula's preservation program is housed in long-range planning, the Historic Preservation Officer (HPO) strives to recognize the many benefits that historic preservation can serve toward other initiatives as well, incorporating sustainability, economic incentive and community development, for the progression of preservation in Missoula as a whole.

In an effort to achieve and further the mission codified in Title 20 of the Missoula City Ordinance, "to promote, safeguard and significantly enhance our sense of place and cultural heritage through historic preservation," the City will focus on implementing a work plan which strives to modernize the established regulatory framework and existing efforts. The HPO and Historic Preservation Commission (HPC) will do this through a number of ways, including improving upon our existing programs and outreach events; May Preservation Month and Awards, September's Walk & Roll Week, Unseen Missoula tours and interpretive space, and the newly established Missoula Legacy Business Recognition Program. In 2019, based off the success of Unseen Missoula, the Missoula Downtown Association and HPO partnership applied for and received the MT Department of Commerce Tourism Grant for \$15,810 to establish a Heritage Interpretive Plan for downtown Missoula (DTHIP). This plan has recently been finalized and will be implemented through City Council by a Resolution of Support by early spring of 2020. The DTHIP incorporates elements of Unseen Missoula, Legacy Businesses, guides wayfinding signage, and expands upon the new Downtown Master Plan (DTMP) recommendations, among other heritage related initiatives.

In addition to outreach, education and community development, the HPO and HPC work to facilitate appropriate preservation, restoration, rehabilitation and adaptive reuse of Missoula's built environment. This is done through the established historic preservation ordinance which includes parameters for the issuance of historic preservation permits (HPP). The work plan calls for a series of updates to the existing ordinance including establishing a stronger

Local Register of Historic Places, developing protections for contributing buildings, updating the City Preservation Plan, building a preservation fund, addressing demolition by neglect and implementing recommendations prescribed by the DTHIP and the DTMP. In 2019, the HPO established the Adaptive Reuse Zoning Overlay (/AR), which provides incentive for the adaptive reuse of listed or eligible buildings by exempting them from certain zoning restrictions. It allows parking waivers, lightened fees and increased permit processing time. A building with an /AR Overlay would be added to our Local Register of Historic Places, and would be obligated to our existing historic preservation permit ordinance and process. This will serve as a valuable tool for historic schools, churches, government buildings, or those regularly not zoned commercial, and will be utilized for the first time in 2020.

The City is working on implementing historic preservation into other long term plans and initiatives as well. The HPO regularly participates in reviewing for “Design Excellence,” building design standards and guidelines for development along the commercial corridors and in the downtown. This promotes high quality design for new development and existing buildings that would be compatible and sensitive to the historic characteristics of Missoula’s downtown core.

The work plan also calls for further inclusion of historic preservation within the City Growth Policy, which will be updated in 2020. In addition to Missoula’s preservation ordinance, the City Growth Policy, adopted in 2015, states that of the seven “Prioritized Action Themes,” the first listed is, “Quality Community,” which serves to, “support Missoula’s strong sense of place that comes from its cultural heritage, setting, accepting attitude, appreciation for active and healthy lifestyle, and the desire to meet the basic needs for all people.” Within the chapter devoted to Livability, the first goal states that “Missoula values its cultural heritage through historic preservation.” These provisions as well as the established regulatory framework in City code, the DTHIP, DTMAP, and programming and outreach events, such as May Preservation Month, Unseen Missoula, and legacy businesses, illustrate how historic preservation concerns and initiatives have been and will continue to be implemented into the overall long-range planning process for the City.

The CLG grant and the City of Missoula’s budget supports one full-time position of HPO, which resides in Development Services in long-range planning. The HPO participates in many planning projects, ensuring that preservation is observed and integrated at all levels of city planning. In doing so, the HPO staffs all HPC meetings and subcommittee meetings and regularly attends City Council and Land Use and Planning meetings among others. This year’s program commitment in dollars will be \$78,019 and supports the HPO position and program’s operating budget. Regular work duties include 40 hours per week for a total of 2,080 hours annually.

THE 2020 HPO WORK PLAN INCLUDES THE FOLLOWING:

All projects are ongoing unless otherwise stated

I. Education

Provide guidance, information, instruction and assistance to the public in all historic preservation related issues.

- Advise and educate elected officials, City staff and the public regarding historic preservation, the designation process, and the HPP process
 - Establish and implement updated HPP applications and provide consultation and support throughout the process as the issuing officer for HPPs
 - Provide preservation information services for the community and staff the Historic Preservation Office
- General Outreach
 - Continue to improve and update the city historic preservation website, Facebook, Instagram and other social media outlets and promote a cohesive branding identity
 - Provide up-to-date research regarding historic preservation and planning to the community and within Development Services
 - Encourage integration of preservation in policy-making with outreach to local political leaders
 - Update, create and provide downloadable handouts, guides, information and tours
 - Host First Friday events and continue to curate the Unseen Museum with new exhibits
 - Continue to improve upon existing and create new community relationships including Preserve Historic Missoula, UM, THPOs, SHPO, Missoula County, Five Valleys Land Trust and more
 - Present on various topics including Unseen Missoula, DTHIP, Legacy Businesses and the /AR Overlay at regional and national conferences
- Aid the HPC in Preservation Month 2020
 - Plan a celebration which will reach a broader portion of the community and acknowledge legacy businesses which have been in Missoula for over 100 years (new effort)
 - Plan two tours and a masonry workshop throughout the month
 - Promote Biannual Awards for 2021
 - Outreach for all activities
- Aid in Walk & Roll Week, Moon Randolph Homestead, LaLonde Ranch, winter and summer education programming

II. Programming

Update existing and establish new incentive programs and partnerships to better accommodate local historic preservation related efforts.

- Continue to oversee HPC programming and the HP permitting process
- Coordinate with the Missoula Redevelopment Agency (MRA) to ensure historic preservation incentives are considered in tax increment financing district programming and projects
 - Explore reestablishing the historic preservation façade improvement program and preservation easements (new effort)
- Work with the Missoula Downtown Association in heritage tourism and economic development initiatives
 - Continue expanding the Downtown Heritage Program/Unseen Missoula
 - Guided and self-guided tours, create and implement new tours
 - Story collection and curation
 - Cement a physical museum/interpretation place

- Community connection and engagement
 - Create a website which provides easier access to heritage resources and programming
- Serve on the implementation committee for the DTHIP and DTMP (new effort)
 - Integrate the Downtown Heritage Program within the new Downtown Master Plan (new effort)
- Continue and improve a working relationship with the Facilities Department of the University of Montana for campus development and project review
- Carry out the Certified Local Government Program objectives, including updating the general master plan, five year Historic Preservation Plan, and/or create a new strategic plan (new effort)
- Monitor projects and provide information and assistance to potential applicants for tax credit projects and grant opportunities
- Aid in programming for the historic Moon-Randolph Homestead and oversee the summer '20 historic preservation intern
- Apply for grants in support of the city's historic preservation goals
- Continue research and evaluation of undertakings for compliance with Section 106 of the NHPA
- Attend HP Commission, Planning Board, Land Use and Planning Committee, and City Council meetings
- Provide staff support for design guidelines/Design Excellent Project for downtown and commercial corridors
- Provide staff support for the University Neighborhood Character Overlay (new effort)
- Aid Missoula County in exploring a potential Heritage Advisory Commission and with their work on the LaLonde Ranch Heritage Park (new effort)
- Work to create new programming such as Legacy Businesses (new effort)
- Create a Local Register of Historic Places which will align with the new /AR Overlay (new effort)

III. Identification and Documentation

Continue efforts to locate, evaluate, identify and provide historic documentation of potential historic structures and sites.

- Inspect and evaluate historic properties
- Actively communicate with neighborhood organizations and property owners to discover undocumented, unlisted properties and conduct site visits
- Add at least one new listing to the National Register of Historic Places by 2021; continue to work on 418 E. Spruce nomination
- Update historic district surveys and nominations that haven't been resurveyed in the past twenty-plus years (new effort)
- Provide comment on actions that impact historic resources, including city/state/federal planning programs, environmental studies (EA's, EIS's), rezonings and text amendments to zoning ordinance, zoning variance applications, subdivision plats and other development proposals
- Continue to work with Parks and Recreation and producing a preservation/interpretation plan for the Rattlesnake Dam removal project

IV. Ordinance/Code Updates

- Integrate and administer the updated demolition portion and create a new HPP application just for demolition
- Provide staff support for the /AR Overlay (new effort)
- Begin planning for further updates to the historic preservation ordinance
 - Contributing building protections/Districts as a whole (new effort)
 - Implement consequences for demolition by neglect (new effort)
 - Create a City preservation fund (new effort)
 - Provide programming for our Local Register of Historic Places

- Consider creating easier access to preservation and/or façade easements

HPC GOALS AND PRIORITIES FOR 2020:

- Historic Preservation Month/Celebration
- Creative new programming such as Legacy Businesses
- Update Historic Preservation Plan/Create strategic plan
- Downtown Heritage Planning/Unseen Missoula/DTHIP/DTMP
- Work on partnerships/present to City Council
- /AR Overlay/Incentivize adaptive reuse
- Local Register of Historic Places review
- New NRHP listing: 418 E. Spruce
- Provide updates to the existing Historic Preservation ordinance to include further protections
- Focus on climate change as it relates to Historic Preservation

BUDGET

| 4-1-2020 to 3-31-2021 Budget | Cash Amount | Cash Source | In-kind Amount | In-kind Source | Total |
|--|---|------------------------------|---|---------------------|-----------|
| A. Salaries, Wages, Benefits | \$70,392 \$5500 | Ci F | | | \$75,892 |
| B. Office Rental | | | | | |
| C. Equipment | | | | | |
| D. Supplies & Materials Itemize major categories Office Supplies Operating Supplies Gasoline Publicity/ Subscriptions/Dues | \$100 \$1500 \$25 \$1000 | Ci Ci Ci Ci | | | \$2625 |
| E. Postage Communications | \$100 | Ci | | | \$100 |
| F. Telephone & Internet | | | | | |
| G. Photocopies Printing/Duplicating | \$600 | Ci | | | \$600 |
| H. Preservation Commission Number of hours X * rate X number of members X number of meetings | | | 2 hrs x \$22.42 x 6 members x 12 meetings = \$3,228.48 2 hrs x \$89.17 x 3 members x 12 meetings = \$6420.24 | Donated Services | \$9648.72 |

| | | | | | |
|---|----------|----|-----------|--|-------------|
| I. Volunteers Hours X * rate X number of volunteers. | | | | | |
| J. Travel Mileage Number of miles X \$0.58. Include funds for HPO and/or Commissioners to attend CLG annual training | \$500 | Ci | | | \$500 |
| K. Travel Meals # of Meals X rate: Breakfast - \$5.00 Lunch - \$6.00 Dinner - \$12.00 | \$252 | Ci | | | \$252 |
| L. Lodging \$94.00 plus tax X number of nights | \$400 | Ci | | | \$400 |
| M. Project (s) Expenses – fully itemized Professional Services - Savings for consultant costs | \$2500 | Ci | | | \$2500 |
| N. Other Expenses – fully itemized. Training costs | \$650 | Ci | | | \$650 |
| M. Total Expenses | \$83,519 | | \$9648.72 | | \$93,167.72 |

SOURCE KEY:

F-Federal

CI-City

CO-County

NP- Private/Non-Profit

* Federally approved minimum rate for volunteers is \$22.42 per hour.

DRAFT

SOURCES OF REVENUE/FUNDING**AMOUNT****Itemized Cash Match Source**

City Budget \$78,019

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Itemized In-Kind Match Source

Donated Services \$9648.72

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Federal HPF Grant Request from SHPO \$5500

TOTAL REVENUE \$93,167.72

Certified Local Government
Historic Preservation Commission Chairperson or President

Signature _____ Date _____

Name (typed) Jamie Lockman

Address 3312 Hollis St, Missoula MT, 59801

Telephone 406-546-6772

Certified Local Government
Chief Elected Official

Signature _____ Date _____

Name (typed) John Engen

Title Mayor

Address 435 Ryman, Missoula MT, 59802

Telephone 406-552-6001

(The local government administrator may sign **in addition** to the Chief Elected Official.)

Certified Local Government
Historic Preservation Officer

Signature _____ Date _____

Name (typed) Emy Scherrer

Address 435 Ryman, Missoula MT, 59802

Telephone 406-552-6638

Please attach the meeting minutes (or an alternate way in writing) at which your application was discussed and approved by the Preservation Board/Commission.

Please attach a list of the historic preservation board members' names citizen membership, terms (year ending), their professional discipline or status as a citizen member on the board, and contact information.

Historic Preservation Commission Members

*Alternate 1 – Vacant, the position is posted and accepting applications until 2/12/20

*At Large – Vacant, the position is posted and accepting applications until 2/12/20

New Member

Steve Adler – Professional Rep

Term: 1/7/19 - 12/31/20

210 N. Higgins #334

Missoula, MT 59802

preservesteve@gmail.com

Cathy Bickenheuser – Professional Rep

Term: 1/1/20 – 12/31/22

2829 Shan Drive

Missoula, MT 59804

cmbickenheuser@charter.net

Paul Filicetti – Vice Chair, Downtown Rep

Term: 1/1/20 – 12/31/22

627 S. 4th St. W.

Missoula, MT 59802

pfilicetti@aearchitects.com

Bruce Haroldson – Regular Member

Term: 1/7/19 – 12/31/20

414 Eddy Ave

Missoula, MT 59801

bharoldson@dc-engineers.com

Jamie Lockman – Chair, Alternate 2

Term: 1/7/19 – 12/31/20

3312 Hollis Street

Missoula, MT 59801

jamieryanlockman@gmail.com

James McDonald – Professional Rep

Term: 1/7/19 – 12/31/20

A&E Architects PC

222 N. Higgins Ave.

Missoula, MT 59802

jmcdonald@aearchitects.com

Kent Watson – At Large

Term – 1/1/20 – 12/31/22

225 Black Pine Trail

Missoula, MT 59803

kentwla@gmail.com