

CITY OF BOZEMAN

FINAL NCOD POLICY DIRECTION

JUNE 2019



 **BendonAdams**

ORION 
PLANNING+DESIGN



ACKNOWLEDGEMENTS

Prepared for the City of Bozeman.

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DISCLAIMER

Unless otherwise specified, all documentation contained within this report has been aggregated and recorded through materials received during outreach initiatives. Direct quotes and transcriptions are emphasized in italics. Data includes all comments recorded by facilitators and participants during noted outreach activities.

While the majority of data was captured digitally, it is possible that errors may have occurred in the transcription of hand-written comments. This would have principally occurred due to interpretation and the nature of the notes captured in the engagement activities.

The Consultant has taken all care during the transcription process, but unfortunately, we cannot guarantee the accuracy of all notes.

We are however confident that the full range of ideas, concerns and views expressed during the engagement activities have been captured in this report. Unless otherwise noted, the views expressed herein represent those of the engagement participants.

BendonAdams is committed to protecting the privacy of all participants who participated in the engagement process and has published comments anonymously unless otherwise presented as formal public comment to the City.

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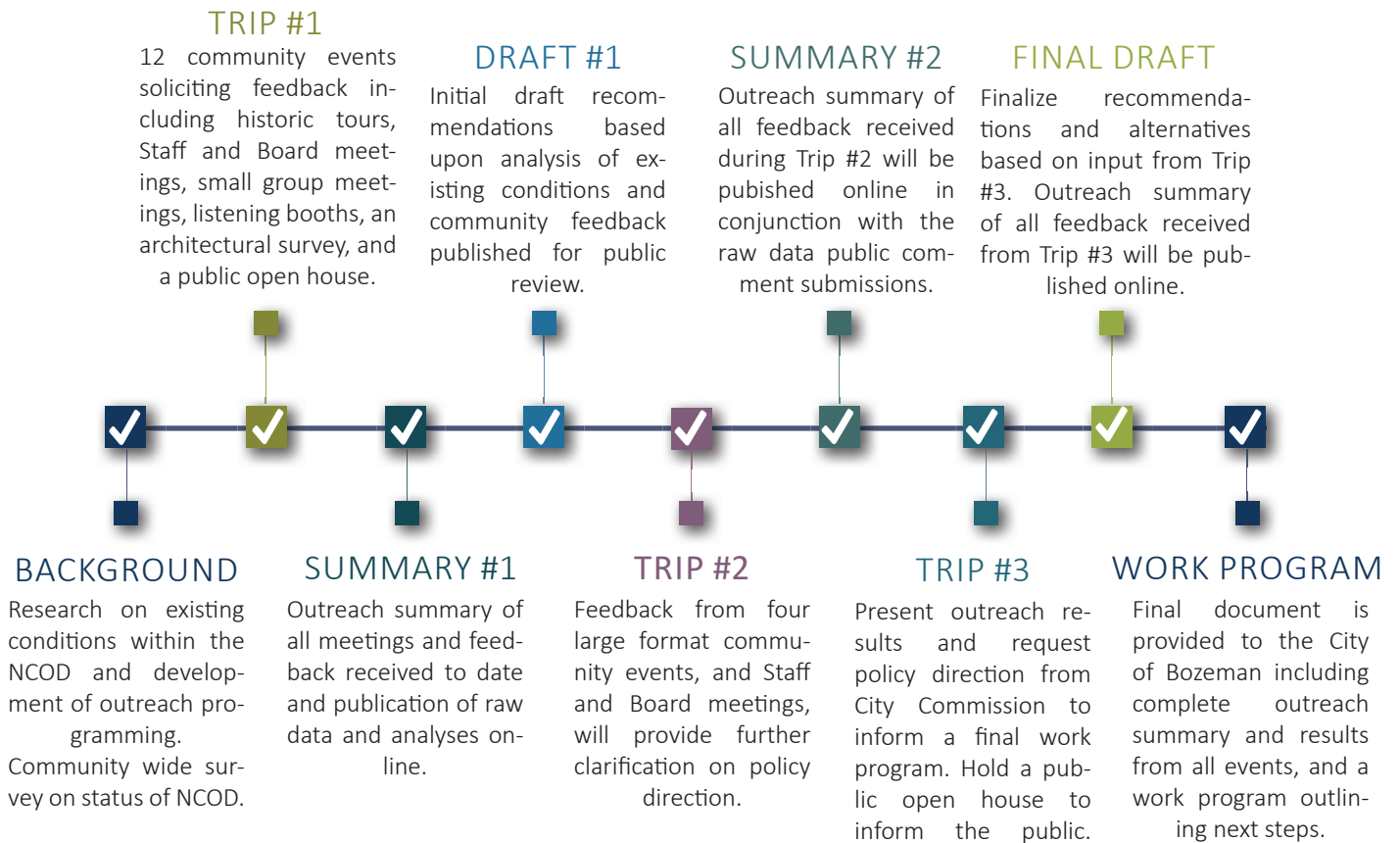
CHAPTER 1

PROJECT TIMELINE + INTRODUCTION



1 PROJECT TIMELINE

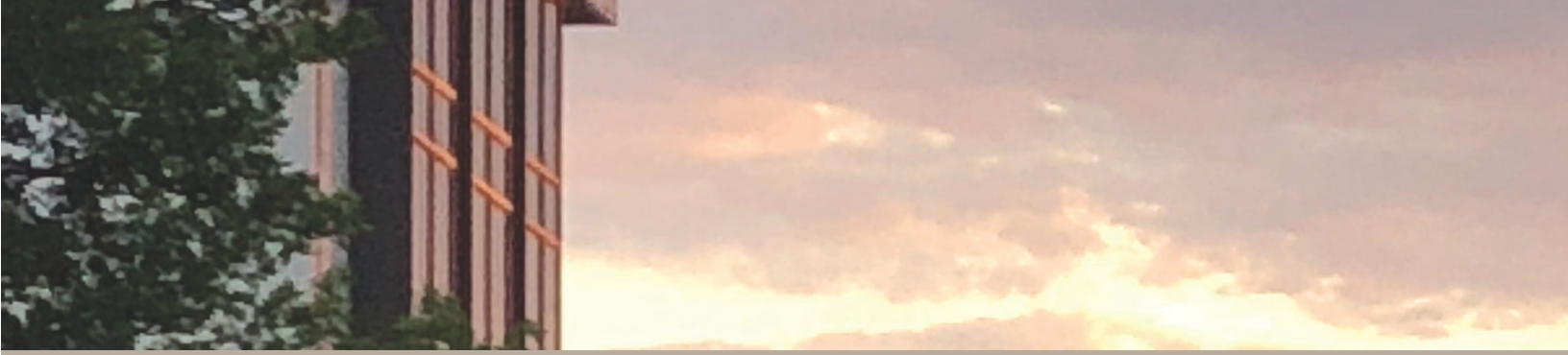
The consultant team (consisting of BendonAdams and Orion Planning + Design) was tasked with conducting extensive public engagement to best understand the community’s needs and preferences regarding historic preservation, the Neighborhood Conservation Overlay District, historic district boundaries, and future development. Below are high level findings from Community Outreach Phase I and Phase II. A full summary of findings can be found in Appendix A.



2018 STRATEGIC PLAN

POLICY 1.1.B DRAMATICALLY INCREASE TRANSPARENCY AND CREATE ACCESS TO ALL CITY DOCUMENTS. (P.2)

POLICY 1.2 BROADEN AND DEEPEN ENGAGEMENT OF THE COMMUNITY IN CITY GOVERNMENT, INNOVATING METHODS FOR INVITING INPUT FROM THE COMMUNITY AND STAKEHOLDERS (P.2)



1.1 INTRODUCTION

Bozeman’s decision to adopt a Conservation Overlay District that includes the areas between designated Historic Districts was a gutsy solution in 1991 that made Bozeman a pioneer in preservation of neighborhood character, scale and context. The result 27 years later is well preserved historic districts and neighborhood character that supports a sense of place and a sense of pride for the community. Interwoven within the Neighborhood Conservation Overlay District is the majority of Bozeman’s designated historic districts, with two historic districts located just outside the overlay boundary.

Recent projects had residents, city staff, and review boards questioning the effectiveness of the Neighborhood Conservation Overlay District (NCOD) and whether other planning tools exist to better reflect community sentiment. The Bozeman Community may have differing opinions on the means and methods, but goal is the same: Bozeman is a special place worth protecting.

The NCOD has been in place since 1991 to protect neighborhood character, historic districts, and historic landmarks. The historic preservation program goes beyond the NCOD to foster the knowledge of the city’s heritage, and cultivate civic pride in the historic built environment. The 2015 NCOD Audit recommended removal of the NCOD by 2020 and replacement with a series of design overlay areas and design guidelines to promote contextual and compatible development outside Historic Districts. The recommendations from the audit have been reviewed and taken into consideration as part of this project. Based on current community sentiment, it was felt that an objective review that focused on a comprehensive understanding of the NCOD and the historic districts was the best approach. This report summarizes community outreach findings and final policy direction from the City Commission.





1.2 HOW TO USE THIS DOCUMENT

This document contains the final adopted policy direction, community feedback, and areas for future discussion. The first page of each Chapter contains the final adopted policy followed by the adopted workplan. The adopted policies are further incorporated into each chapter narrative to provide context and background. Some of the adopted policies include “tools for future discussion” that are based on recommendations and alternatives that were presented to the community throughout the project.

City of Bozeman planning staff provided an analysis of the 2009 Bozeman Community Plan and the 2018 Bozeman Strategic Plan compared to the draft NCOD recommendations contained herein. Correlations between the documents are noted throughout the document. The entire report reflects many of the adopted goals and objectives of the 2018 Strategic Plan, the 2009 Bozeman Community Plan, and the adopted 2019 Downtown Bozeman Improvement Plan, as noted below.

2018 STRATEGIC MASTER PLAN

POLICY 4.1.B DEVELOP AND ALIGN INFILL POLICIES. (P.6)

Develop, adopt and align city policies for infill and redevelopment, economic development and public infrastructure. This report is part of the infill conversation.

POLICY 7.3.E HIGH LEVEL POLICY CONVERSATIONS. (P.11)

Develop a structure to foster regular, ongoing dialogue on innovative ideas and information to assist the Commission with high level policy deliberation and decisions.

2009 COMMUNITY PLAN

CHAPTER 1.3, GOAL G-2 IMPLEMENTATION. (P.13)

Ensure that all regulatory and non-regulatory implementation actions undertaken by the City to achieve the goals and objectives of this plan are effective, fair, and are reviewed for consistency with this plan on a regular basis.

CHAPTER 4.3, GOAL C-4 DESIGN GUIDELINES. (P.50)

Create illustrated design guidelines to give clear direction in design and review of residential and non-residential neighborhoods without unduly constraining architectural style and innovation.

Chapter 5.3, Goal HP-1 HISTORIC PRESERVATION. (P.57)

Protect historically and culturally significant resources that contribute to the community’s identity, history, and quality of life.

1.3 EXECUTIVE SUMMARY

On April 8, 2019 final recommendations were presented to the Bozeman Mayor and City Commission during a regularly scheduled meeting. In addition to the draft report, a workplan that categorized the recommendations into short, mid and long term goals was presented. The Commission formally received the report, considered recommendations from the Historic Preservation Advisory Board, the Planning Board and the Zoning Commission, and adopted actions to be implemented as a work plan. The adopted directives and workplan are listed below, and are included at the beginning of each chapter of this report. The report provides background and alternative recommendations that evolved through the NCOD and Historic Preservation Program Review project.

2.1	<p>Create two programs within the NCOD boundary to distinguish the two separate goals within the NCOD. Both programs will work together, while a Historic Preservation Program will also apply to landmarks and historic districts outside the boundary of the NCOD:</p> <ol style="list-style-type: none"> 1) Preserve historic buildings that reflect Bozeman’s significant history; and 2) Enhance neighborhood character and context.
2.2	<p>Do not significantly change the NCOD boundary.</p> <ol style="list-style-type: none"> 1) Remove North 7th from the NCOD. 2) Move boundary to Front Street as proposed. 3) Windshield survey of NCOD to provide basis for potential boundary adjustment- with moderate level of survey for some areas. 4) Prioritize areas to incrementally inventory to provide basis for potential boundary adjustment. Identify the areas for the formal architectural survey.
2.3	<p>Create 3 sets of design standards and guidelines that are divided into a character area north of Downtown, a character area south of Downtown, and Downtown. There should be general guidelines that support connectivity between the areas, create a common thread between neighborhoods, and support transitions between neighborhoods. Focus on large areas and eventually recognize special characteristics of each area and context.</p>
3.1	<p>Phase-in a local historic preservation program.</p>
3.2	<p>Explore a variety of incentives for historic properties owners. Engage with historic property owners to ensure incentive relevance and clarity.</p>
3.3	<p>Allow HPAB recommendations for historic projects and for projects within a historic district. Start HPAB review of demolitions as a way to ease into review authority.</p>
3.4	<p>Create historic preservation (HP) standards and guidelines.</p>



1.3 EXECUTIVE SUMMARY

4.1	Study of the B-3 transition zone should be a mid- or long-term priority rather than an immediate priority.
4.2	Explore adjusting the historic district boundaries to relate to the existing zone districts. Gather more data after the architectural survey and design guidelines and standards are completed. Use tools such as 3-D modeling to understand zoning, mass and scale.
4.3	Consider aligning zone district allowances with neighborhood character. Gather more data after the architectural survey and design guidelines and standards are completed. Use tools such as 3-D modeling to understand zoning, mass and scale.
5.1	Ensure the review process is understandable and streamlined.
6.1	Strengthen existing project information channels and work on push notifications City-wide.
6.2	Develop a plan to have public meetings prior to application review with impacted neighbors. Collect input from neighbors on large scale projects. Add noticing requirements with area radius. Develop minimum standards that applicant has to meet. Develop clear thresholds that trigger review.

SHORT TERM

Explore a variety of incentives for historic properties and historic districts.

Start HPAB review of demolition applications.

Conduct extensive outreach with historic property owners on possible incentives.

Develop quick reference guides for appropriate repairs of historic properties

Write context papers on Bozeman's vernacular buildings identified in survey but not eligible for National Register

MID-TERM

Adopt local historic preservation program with Bozeman specific rules to designate landmarks, districts, process for exterior changes.

Process for HPAB recommendations for historic projects and projects within a historic district.

Adopt incentives for historic property owners.

Create historic design standards and guidelines for historic districts and landmarks that align with updated Sec. of Interior's Standards.

LONGTERM

Locally designate National Register (NR) properties with owner consent.

Begin process to nominate new NR listings and boundaries for NR historic districts.

Begin process to amend NR listings and boundaries for NR historic districts.

Training for HPAB members.

Architectural Inventory - historic districts and landmarks (build on recent inventory of downtown buildings).

Windshield survey - neighborhood association areas and areas outside of established neighborhoods..

Develop preservation plan with HPAB to identify preservation goals.

Require input from established neighborhood associations on large scale projects and possibly rezoning applications.

Strengthen existing project information channels and work on push notifications City-wide.

Develop a plan to have public meetings prior to application review with impacted neighbors. Collect input from neighbors on large scale projects. Add noticing requirements with area radius. Develop minimum standards that applicant has to meet. Develop clear thresholds that trigger review.

Map review process and identify redundant requirements and areas of overlap for projects within the NCOD: i.e. Article 5, Site Plan Review, Project Review.

Adjust NCOD boundary based on results of building survey:
* N. 7th all out.
* Use Front St. as northern edge.

Define neighborhood character.

Analyze zone districts:
ID where dimensional requirements and boundaries conflict with neighborhood character/future vision, or historic district boundary.

Exempt the NCOD from duplicative review processes and replace with context derived standards and guidelines.

Create 3 sets of design standards and guidelines that are divided into a character area north of Downtown, a character area south of Downtown, and Downtown. There should be general guidelines that support connectivity between the areas, create a common thread between neighborhoods, and support transitions between neighborhoods. Focus on large areas and eventually recognize special characteristics of each area and context.

Amend zone district requirements to relate to neighborhood (or historic district if applicable) character (either existing or future vision).

Create transition specific standards and guidelines that are context based and replace Article 5 standards (where it is redundant) for projects within NCOD.

Gather more data after the architectural survey, scenarios, and design guidelines and standards are completed. Use tools such as 3-D modeling to understand zoning, mass and scale.

1.5 OUTREACH FINDINGS

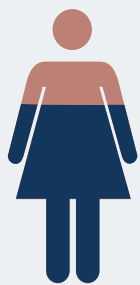
The consultant team (consisting of BendonAdams and Orion Planning + Design) was tasked with conducting extensive public engagement to best understand the community’s needs and preferences regarding historic preservation, the NCOD, historic district boundaries, and future development. Below are high level findings from Community Outreach Phase I and Phase II.

PHASE I COMMUNITY OUTREACH

In July 2018, the project team spent two weeks in Bozeman engaging with the public at 12 different events. The events included small group meetings, a historic tour, board and staff meetings, listening posts, an open house, and a windshield architectural survey. A project page hosted by the City of Bozeman was also launched containing project information, upcoming dates, feedback summaries, feedback data, and opportunities for public comment.

Over 150 participants joined small group meetings, listening posts, attended the community meeting and participated in on-line surveys. A high-level summary is provided below:

Phase I: July - August 2018



54 % Female

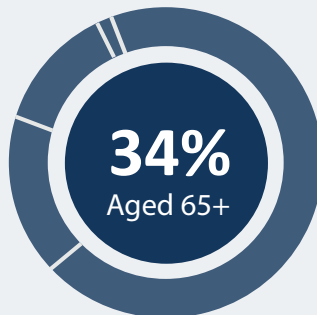


46 % Male



90 % are Bozeman Residents

2%	Aged <24
11%	Aged 25-34
21%	Aged 35-54
33%	Aged 55-64



Concern

Many participants expressed a concern over recent development projects, specifically the size, scale, and design of particular buildings within the NCOD. This generally pertained to the areas directly adjacent to Main Street that are seeing new higher density development. Some participants expressed an interest in creating transitional ‘buffer areas’.

Regulations

While there were mixed opinions on whether the current regulations are ‘too stringent’ or ‘too liberal’ on development - participants felt that Historic Districts should remain ‘strictly regulated’ while areas outside the Districts but still within the NCOD should be treated ‘with moderation.’

Pace of Development

The majority of participants felt that the pace of recent development in Bozeman has been ‘too fast’ - and would like to see the project review process slowed down to allow for a more robust public participation process. Many felt that slowing down the process would ensure a focus on historic preservation and thoughtful, compatible development.



STRATEGIC PLAN POLICIES 1.1.B, 1.2

1.5 OUTREACH FINDINGS

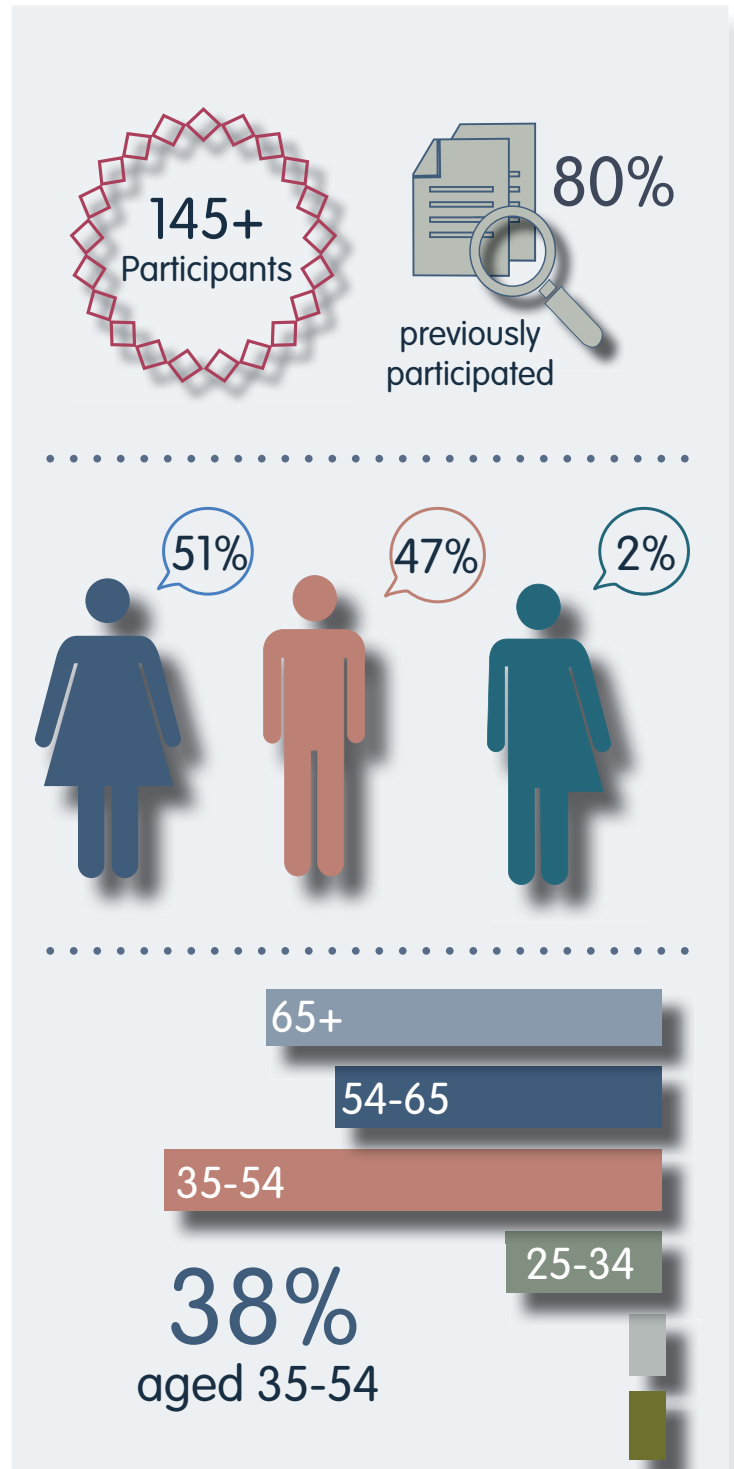
PHASE II COMMUNITY OUTREACH

The project team returned in November of 2018 for the second phase of community engagement which encompassed four large format meetings, two open houses and two live polling sessions. These were followed by an intensive online survey.

Our team presented the draft policy recommendations published in the October 23, 2018 draft report (available at www.bozeman.net/city-project/ncod-review and participants were polled to show their level of support for each of the proposed recommendations and policy alternatives.

Over the course of a few weeks 145 community members participated in the live polling sessions, the open house poster voting sessions, provided open comment via post-cards, and the online survey.

Below we have summarized participant demographics and the high-level community sentiments:



1.5 OUTREACH FINDINGS



NCOD: Purpose + Boundary

The majority of participants supported retaining the NCOD, stating that they felt it has been effective and it would be easier to 'tweak' the NCOD than to start over. Some participants were interested in exploring replacement of the NCOD with design guidelines. It was felt that design guidelines might help new designs fit into existing context.

Participants expressed moderate to high support for creating standards and guidelines specific to different areas and neighborhoods. Participants expressed moderate to high interest in retaining the current area of the NCOD and were supportive of making minor changes immediately- many felt that significant changes warranted an architectural survey.

Historic Preservation

There was a high level of support for strengthening the Historic Preservation program with the majority of participants feeling that it would aid efforts to preserve Bozeman's unique history. There were some participants that expressed concern over increased regulation and review processes becoming convoluted, but the majority did not see any negative impacts to strengthening the program.

There was a high level of support for expanding incentives for historic properties, and a request for further detail and examples. Some felt that it might create additional costs to

the City and could potentially create inequity between contemporary and historic properties. The majority of those polled selected phasing-in a stronger historic preservation program with incremental steps in-lieu of implementing changes simultaneously.

While the majority of participants were interested in HPAB becoming a decision-making body, there was a vocal faction that felt there were other ways to strengthen the program. Over 80% of participants showed moderate to high support for creating standards and guidelines for historic landmarks and historic districts.

Zoning + Context

In conversations with participants, there appeared to be low support for adjusting the B-3 Zone District to allow for increased transitional requirements outside of those found within the UDC. However, across the two polling sessions and online survey, the majority of participants showed moderate to high support for exploring how to better align the southern boundary of B-3 with low scale residential neighborhoods to the south.

Participants felt this opportunity would help to preserve the mass and scale in historic districts and reduce conflict between new developments in existing neighborhoods.

Participants expressed concern over stifling downtown development and pushing development into areas outside of the Main Street area. Participants were particularly conflicted in how to approach adjustments with a fairly even spread polling in favor of creating a transitional zone, incorporating additional site design requirements within existing zone edge requirements, and incentivizing redevelopment along North 7th Street.

While participants felt that aligning zoning with historic districts and neighborhoods would create more consistency in development patterns, there was no consensus on the best approach.

1.5 OUTREACH FINDINGS

Process + Information

Participants were highly in favor of a more streamlined process and wanted more detail on what this could look like on the ground. Many felt that exploring how to streamline current reviews would create a more predictable process that is easier for applicants to understand.

Some participants felt that requiring a binding review process from the Design Review Board might be an option to streamline reviews.

Participants across all meetings and feedback opportunities expressed an interest in having more specific thresholds for how and when project information is shared with both neighbors and the public. Many were interested in building upon existing channels and potentially adding texting alerts or increasing the information on development notices.

BY THE NUMBERS

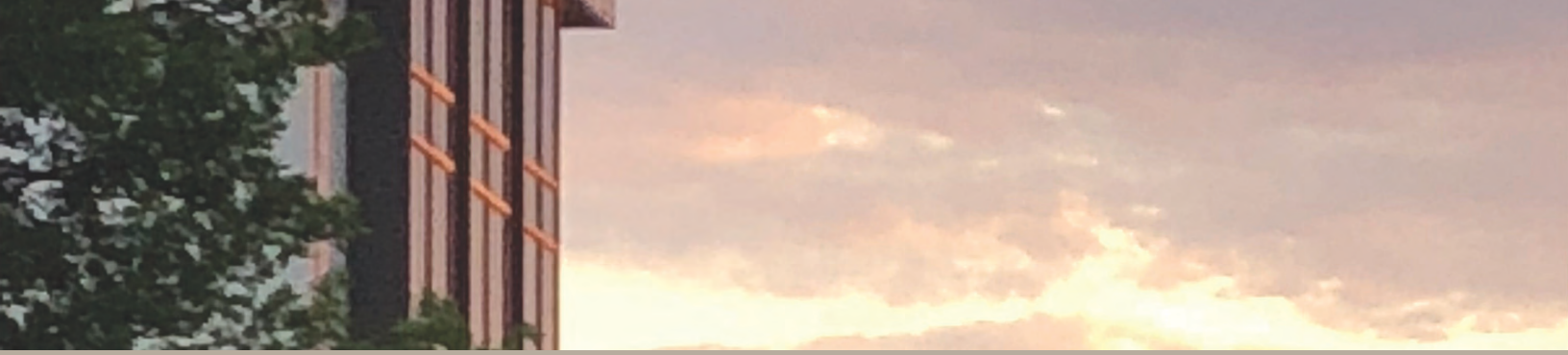
The Bozeman community is very passionate about historic preservation; we engaged with a number of stakeholders, community groups, property owners, historic preservation specialists, developers, architects and designers, and University faculty. Participants were very engaged throughout the project and below we have provided a more detailed summary of the outreach program, engagement levels, and data:

- 21 meetings and events
- 25+ public comment submissions
- 174 online survey responses
- 267 event participants
- 98 activity and survey questions
- 350+ open comments
- 635 windshield property surveys
- Over 20,000 unique points of data across all project activities



The depth of data across all project activities provided the project team with great insights into community sentiment and diversity of opinions regarding how to balance the future of historic preservation policy and growth in Bozeman.

The initial data set from Phase I provided clear direction for the development of draft policy recommendations which were then vetted by the community in Phase II before being presented to the City Boards in February for further refinement prior to adoption by the City Commission in April 2019.



1.6 CHARACTER AREA SURVEYS

Both the windshield survey and the neighborhood character survey are tools within a comprehensive tool box that are combined with outreach results and best practices to ultimately inform specific recommendations in the report related to design guidelines and standards, the NCOD boundary, and the historic preservation program.

WINDSHIELD SURVEYS

Windshield surveys are a useful tool to gain a broad understanding of architecture in a large area. Patterns, similarities and differences in architectural style become evident through data results that can then direct more detailed surveys, appropriate design guidelines, and begin to define specific neighborhood styles.

Volunteers, Bozeman staff and the consultants completed a windshield survey of 635 properties north of Main Street during a week in July 2018. The NCOD area is very large and there was not enough time to complete a windshield survey of the entire district, much less a time intensive architectural survey of the designated historic districts.

Surveys focused on roof forms, trees, fencing, landscape,

number of stories, roof typology, chimneys, porches, window typology, entrance features, materials of principal buildings, and detached secondary buildings.

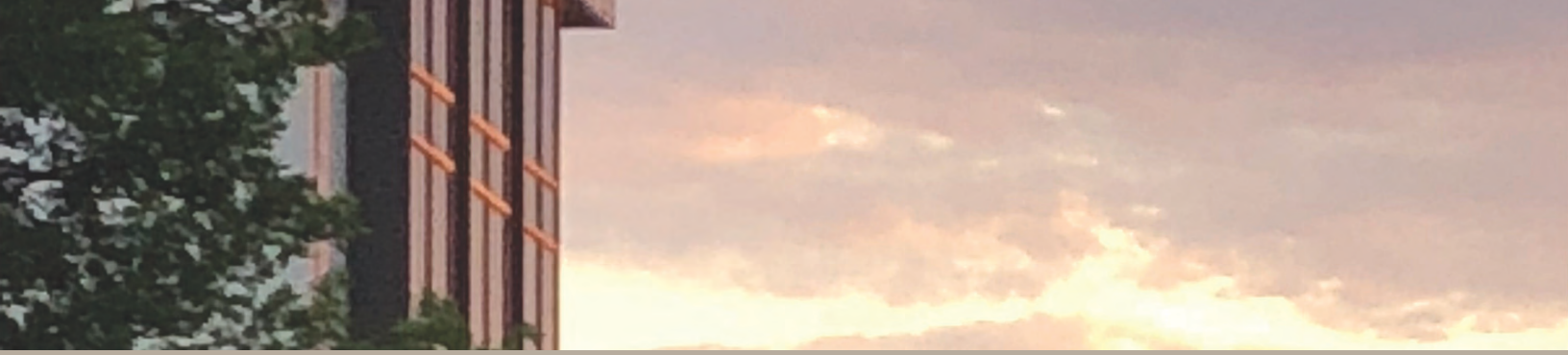
ONLINE NEIGHBORHOOD CHARACTER SURVEY

In order to prioritize the districts and neighborhoods within the NCOD, an online neighborhood character survey was developed that garnered feedback on the specific questions such as “which 3 [Districts] have the greatest mass and scale challenges with new development?” and “on a scale of 1 – 10 what is the importance of historic preservation in these neighborhoods?”

The online neighborhood character survey asked participants to describe each area with one word to define neighborhood character, inform future design guidelines, and to help focus the City’s future survey work to areas of immediate concern.

While the neighborhood character survey is a helpful tool, it has limited capabilities: for example, areas between established neighborhood association and historic district boundaries are not included in this study. It is imperative that these areas are surveyed to document basic neighborhood characteristics.





1.6 CHARACTER AREA SURVEYS

The neighborhood character online survey was incorporated into a prioritized list of neighborhoods and historic districts for future architectural survey work, which will drive potential future boundary adjustments to the NCOD and to historic districts and possibly inform future design guidelines specific to neighborhood character. Priority areas are based on survey and community feedback, background and zoning analysis, and professional expertise.

HISTORIC DISTRICT PRIORITIES

High-Priority Group

Bon Ton
South Tracy/South Black
Lindley Place
Cooper Park Historic District
*note: Main Street was recently surveyed

Mid-Priority Group

Bozeman Brewery
Story Mill
South Tracy Ave.
North Tracy Ave.
Marwyn Addition – potential future historic district

NON-HISTORIC AREA PRIORITIES WITHIN THE NCOD

High-Priority Group

Areas between historic districts and neighborhood association areas
South Central
Cooper Park (non-historic district area)
Bogert Park
Northeast
University

Mid-Priority Group

Lindley Park/Marwyn Lindley
Bozeman Creek

CHAPTER 2

NCOD: PURPOSE AND BOUNDARY





CHAPTER 2 ADOPTED POLICY RECOMMENDATIONS

2.1 NCOD PURPOSE

Create two programs within the NCOD boundary to distinguish the two separate goals within the NCOD. Both programs will work together, while a Historic Preservation Program will also apply to landmarks and historic districts outside the boundary of the NCOD:

- 1) Preserve historic buildings that reflect Bozeman's significant history; and
- 2) Enhance neighborhood character and context.

2.2 NCOD BOUNDARY

Do not significantly change the NCOD boundary.

- 1) Remove North 7th from the NCOD.
- 2) Move boundary to Front Street as proposed.
- 3) Windshield survey of NCOD to provide basis for potential boundary adjustment- with moderate level of survey for some areas.
- 4) Prioritize areas to incrementally inventory to provide basis for potential boundary adjustment. Identify the areas for the formal architectural survey.

2.3 NEIGHBORHOOD DESIGN STANDARDS + GUIDELINES

Create 3 sets of design standards and guidelines that are divided into a character area north of Downtown, a character area south of Downtown, and Downtown. There should be general guidelines that support connectivity between the areas, create a common thread between neighborhoods, and support transitions between neighborhoods. Focus on large areas and eventually recognize special characteristics of each area and context.



CHAPTER 2 WORK PLAN

SHORT TERM

MID-TERM

LONG-TERM

Architectural Inventory - historic districts and landmarks (build on recent inventory of downtown buildings).

Windshield survey - neighborhood association areas and areas outside of established neighborhoods.

Adjust NCOD boundary on results of building survey:

- N. 7th all out.
- Use Front St. as northern edge.

Adopt local historic preservation program with Bozeman specific rules to designate landmarks, districts, process for exterior changes.

Define neighborhood character.

Create neighborhood character design standards and guidelines for North of Main, South of Main, and downtown.

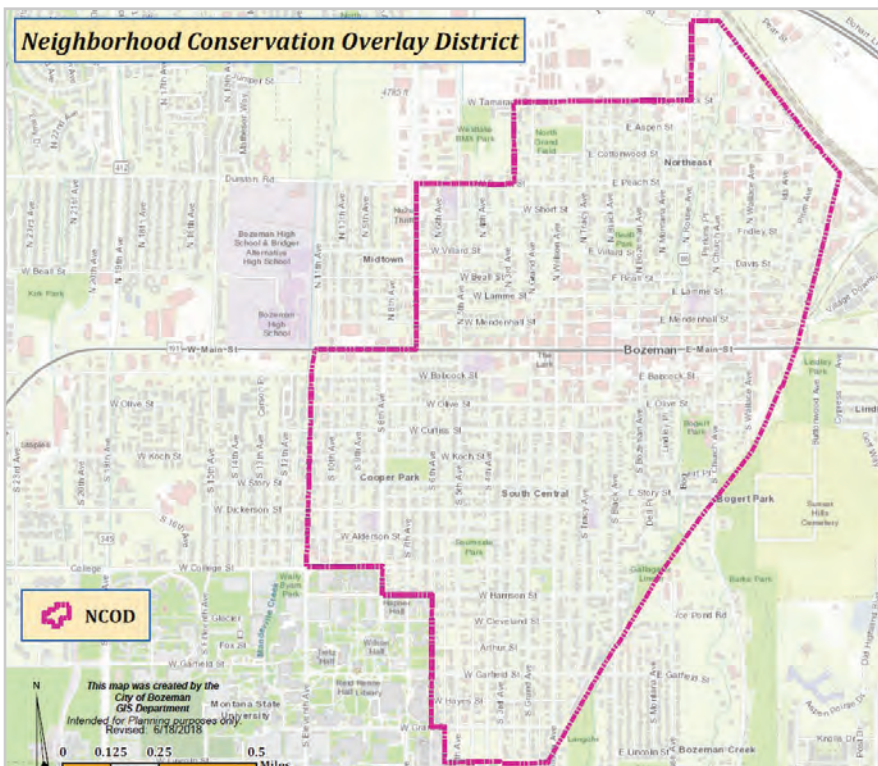


2 NCOD

The NCOD was adopted in 1991 in an effort to preserve historic districts by protecting the surrounding areas between the districts. While the City of Bozeman is preparing for future growth, the effectiveness of the district has been questioned. Based on community input and current neighborhood character, the NCOD has successfully protected the unique character of Bozeman’s neighborhoods; however, recent developments and changing community priorities highlighted the need for a tune up.

The stated purpose of the NCOD in the Bozeman Municipal Code is to “stimulate the restoration and rehabilitation of structures and all other elements contributing to the character and fabric of established residential neighborhoods and commercial or industrial areas.” The concept of the overlay is to influence development between the historic districts and to protect the neighborhood character that defines Bozeman. New construction is encouraged to relate to surrounding historic buildings and neighborhood context, and demolition review is required for buildings within the overlay. While adjustments are recommended to differentiate between historic preservation and neighborhood character, the purpose and intent of the NCOD remains very relevant and important.

The NCOD requires a design review process for all properties that propose alterations, demolition, relocation, or new construction within the overlay district. The NCOD has evolved since its inception to include design regulations and zoning changes; however the original purpose of the NCOD remains unchanged and perhaps more important today in light of Bozeman’s expected population growth.



AN OVERLAY DISTRICT IS A LOCAL ZONING TOOL THAT PLACES SPECIFIC REGULATIONS OVER AN EXISTING BASE ZONE DISTRICT.

A PROPERTY LOCATED WITHIN AN OVERLAY DISTRICT IS TYPICALLY REQUIRED TO MEET BOTH THE BASE (UNDERLYING) ZONE DISTRICT REQUIREMENTS IN ADDITION TO THE SPECIFICS OF THE OVERLAY DISTRICT.

OVERLAY DISTRICTS ARE COMMONLY USED TO INFLUENCE THE DESIGN OF NEW BUILDINGS OR TO DEFINE AN HISTORIC DISTRICT.



2.1 PURPOSE OF THE NCOD

WHAT WE HEARD:

When participants were forced to choose the most important aspect of the NCOD, most voted that it is to protect Bozeman's historic buildings. Regulating the size and scale of new buildings was a close second. When asked what the NCOD does well, participants responded that the NCOD brings awareness to neighborhood context and character, and historic preservation.

The overwhelming response from participants was to create different regulations for historic and non-historic districts within the NCOD. Neighborhood character and context would be the focus of the non-historic districts. The community indicated support for treating historic districts with 'strict regulations' and non-historic districts within the NCOD with 'moderate regulations'.

"The NCOD is flexible, protects neighborhood quality of life and block character/streetscape, thus supports economic engine of community."

"I am very much in favor of maintaining the current NCOD until a proper historic assessment can be completed."

"There are areas in the NCOD that should not be restricted per the NCOD and areas where the NCOD or something similar should be implemented."

"[The NCOD] preserves Bozeman's sense of place and character so it doesn't become "Everywhere, USA."



STRATEGIC PLAN POLICY 4.1.B
COMMUNITY PLAN GOALS 3.3, 4.3

ADOPTED POLICY DIRECTION:

Retain the NCOD.

Create two programs within the NCOD boundary to distinguish the two separate goals within the NCOD:

- 1) Preserve historic buildings that reflect Bozeman's significant history; and
- 2) Enhance neighborhood character and context.

Both programs will work together, while a Historic Preservation Program will also apply to landmarks and historic districts outside the boundary of the NCOD.

1) Historic Preservation Program. A Historic Preservation Program needs to stand on its own outside the umbrella of the NCOD. Historic preservation is a City-wide initiative. Disassociating the program from the NCOD enables preservation of historic building and historic districts outside the NCOD. The historic preservation program will have its own purpose, regulations, guidelines, and review process. As part of this program, the current Historic Preservation Advisory Board will shift to a stronger advisory role which authorizes the Board to review and approve certain historic preservation projects.

2) Neighborhood Conservation (or Character) Program. The Neighborhood Conservation program will apply to the non-historic neighborhoods within the NCOD. This program will also have its own purpose, regulations, guidelines, and review process, and will be implemented by the Design Review Board.



2.2 NCOD BOUNDARY

The NCOD boundary was originally based on a census tract and does not follow a clearly defined geographic or physical feature other than the railroad tracks at the northeast corner of the NCOD. Zone districts, the Story Mill Historic District, and established neighborhood boundaries straddle the NCOD edge as it jogs in and out of neighborhoods. The decision to adjust the boundary must be defensible and based on an analysis of existing conditions. An architectural inventory would provide this basis.

As noted in the 2015 NCOD audit, a comprehensive architectural inventory of the NCOD has not occurred since the 1980s. Because there is no current historic inventory, the City of Bozeman requires applicants to submit an architectural inventory form as part of an application to redevelop or demolish their property. After documentation, a building may be approved for demolition and replacement regardless of historic significance. In addition, over the past decade various groups, including Montana State University students and a City of Bozeman intern, have completed preliminary inventories of the NCOD. While very helpful, the dataset is not consistent and does not replace the need for a comprehensive architectural inventory.

A complete architectural inventory of all buildings within the NCOD (approximately 3,100 properties) would most likely take a year to complete and could cost well over \$300K. A historian who specializes in architectural inventories is recommended to garner data that is accurate, consistent and complies with Montana Historic Property Record forms.

We completed a cursory evaluation of the un-surveyed properties located on the northside of Main Street. The goal of this exercise was to record architectural details on each building, and to identify patterns that define neighborhood character. This information can be tied to existing parcel data and used to establish neighborhood patterns and characteristics that may identify areas for future consideration as a historic district or identify prevalent characteristics important to a neighborhood. For example, in the surveyed area 80% of the homes have a gable roof as the primary roof form and about 50% of the homes have an open front porch.

MONTANA STATE HISTORIC PRESERVATION OFFICE REQUIRES CERTIFIED LOCAL GOVERNMENTS LIKE BOZEMAN TO MAINTAIN AND TO CONTINUE TO IDENTIFY HISTORIC AND PREHISTORIC PROPERTIES WITHIN ITS JURISDICTION. THE BOZEMAN MUNICIPAL CODE STATES THAT THE DISTRICT BOUNDARY MAY BE REVISED AS ADDITIONAL CULTURAL RESOURCE SURVEY WORK IS COMPLETED.

*AN **ARCHITECTURAL INVENTORY** IS A DATABASE THAT SPECIFIES INFORMATION ABOUT THE HISTORY, USE, EXTERIOR FEATURES AND ARCHITECTURE OF AN INDIVIDUAL PROPERTY. THE DATABASE IDENTIFIES ELIGIBILITY FOR NATIONAL, STATE OR LOCAL HISTORIC LANDMARK DESIGNATION, AND IDENTIFIES ELIGIBILITY FOR INCLUSION WITHIN A NATIONAL, STATE OR LOCAL HISTORIC DISTRICT. AN ARCHITECTURAL INVENTORY CAN ALSO BE USED TO DEFINE NEIGHBORHOOD BOUNDARIES BASED ON DIFFERENT FEATURES SUCH AS ARCHITECTURAL STYLE OR BUILDING CONSTRUCTION DATE.*

*A **WINDSHIELD SURVEY** IS A QUICK OBJECTIVE OVERVIEW OF A LARGE AREA THAT PROVIDES GENERAL DATA. IT IS CALLED A WINDSHIELD SURVEY BECAUSE IT IS USUALLY COMPLETED FROM A MOVING VEHICLE. THIS TYPE OF SURVEY IS USED TO PROVIDE A GENERAL ASSESSMENT OF A COMMUNITY AND TO COLLECT DATA ON CHARACTERISTICS THAT IDENTIFY AREAS FOR MORE DETAILED STUDY.*



2.2 NCOD BOUNDARY

The purpose and value of an architectural inventory is three-fold: it informs the NCOD boundary; it provides the basis for the local historic preservation program; and it creates the foundation for new context driven design standards and guidelines.

WHAT WE HEARD:

Most respondents feel that the current NCOD boundary is accurate or needs to be expanded. Participants overwhelmingly voted to refine the NCOD for specific neighborhoods. Many respondents recognize and support the need for a complete architectural inventory of the NCOD and surrounding areas before adjusting the boundary.

“NCOD was designed and created to protect historic areas and neighborhoods; it works as a cohesive area that defines the character of the Bozeman community.”

“[NCOD] strives to consider the historic value of Bozeman neighborhoods and individual buildings as part of the planning process.”

“Revisions to the regulations may be helpful to address noncontributing buildings, however, the survey of historic resources within the City should be updated to ensure the continued preservation of historic resources that may not have been considered historic at the time of the previous survey.”

“I am very much in favor of maintaining the current NCOD until a proper historic assessment can be completed. Given that many of the structures within the boundary were not eligible as historic properties at the time of the last inventory, it is imperative that the inventory be complete and updated before the NCOD boundaries are changed or reduced.”

ADOPTED POLICY DIRECTION:

Retain the majority of the NCOD area.

There is no compelling reason to significantly change the NCOD boundary at this time. Determinations to modify the NCOD boundary should be made with factual information obtained through architectural surveys. The City may also choose to focus energy and funds on completing a comprehensive architectural inventory of the entire NCOD prior to implementing design standards and guidelines (discussed below). An updated architectural inventory is paramount to the function and success of the NCOD, and the preservation of historic properties and neighborhood character. An architectural inventory distinguishes between historic and non-historic properties and districts, and sets clear expectations for property owners, neighbors, staff and review boards.

As noted in Action 4 on the following page, incrementally surveying the NCOD may be the most feasible approach to creating a comprehensive architectural inventory.



STRATEGIC PLAN POLICY 7.4.D



2.2 NCOD BOUNDARY

ADOPTED ACTION:

1) North 7th Street is all out of NCOD.

The North 7th Street corridor should be either all in, or all out, of the NCOD. Bozeman City Commission directed North 7th Street to be all out of the NOCD. Regardless of the NCOD, both sides of the street should have the same design regulations.

Historic eligibility of mid-century buildings along the North 7th Street corridor has been raised by some community members. However, this is not a reason to include North 7th Street in the NCOD - **the primary purpose of the revised NCOD is not to protect historic buildings, but rather to protect neighborhood character.** The implementation of a historic preservation program that extends beyond the boundary of the NCOD would provide protection for eligible buildings if requested by the property owner and approved by the Bozeman Commission.

2) Minor adjustment to the north end of the NCOD

The gap area at the north end of the NCOD cuts through a field/parking area as the terminus of the district. A minor adjustment to the boundary in this area that follows North Rouse Street to the intersection with Front Street clearly delineates the NCOD boundary and avoids future confusion about review process and jurisdiction.

Actions 1 and 2 will have a significant impact on the understanding of the NCOD boundary and the implementation of new regulations recommended in this document. These two recommended adjustments can be made prior to a comprehensive architectural inventory.

3) Windshield survey of NCOD to provide basis for potential boundary adjustment.

A windshield survey is a useful tool to narrow the scope of an architectural inventory and to highlight significant neighborhood patterns such as open front porches.

4) Prioritize areas to incrementally inventory to provide basis for potential boundary adjustment.

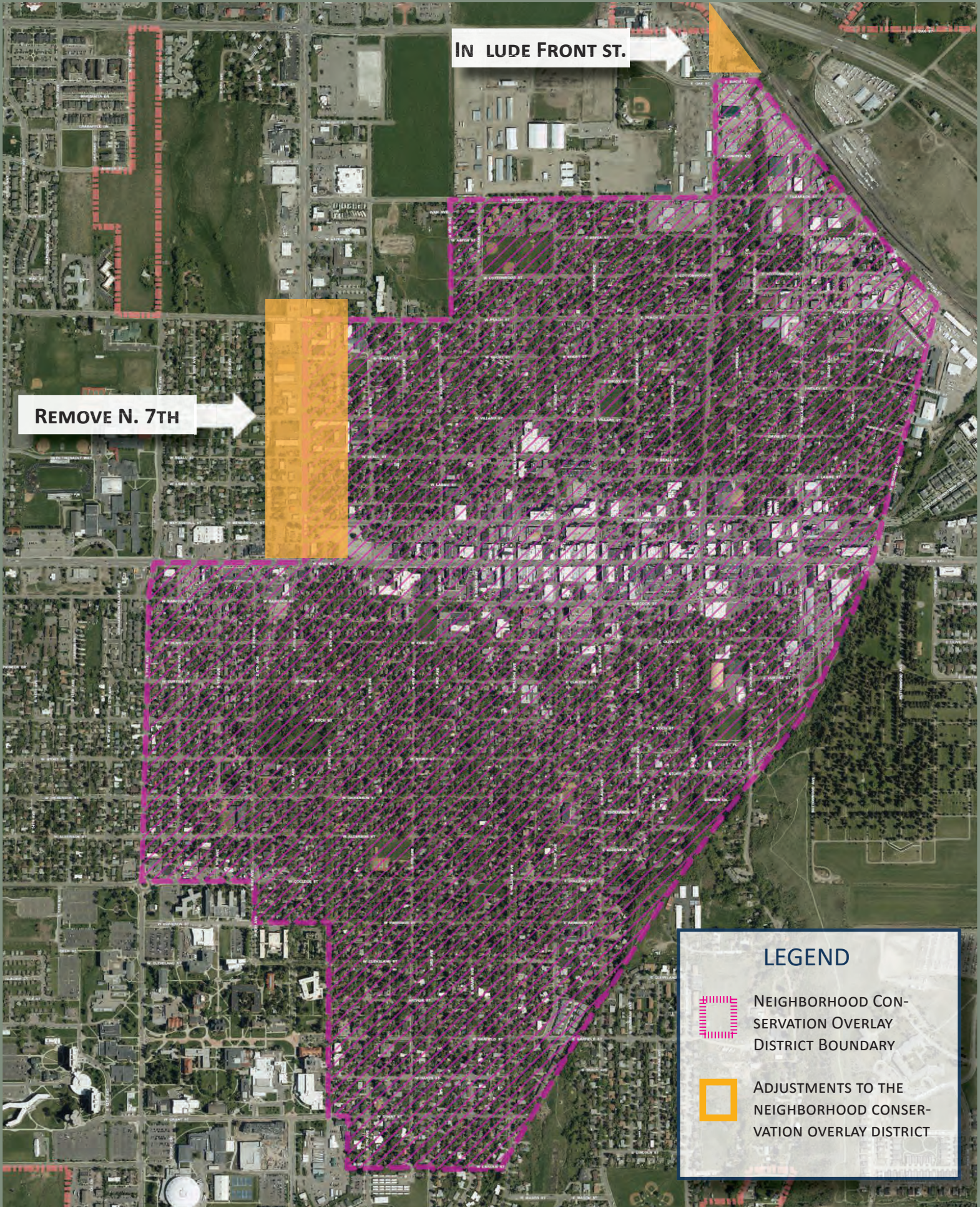
One approach to an architectural inventory is to prioritize sections within the NCOD. For example:

- Historic Districts.
- Areas between Historic Districts.
- North 7th Corridor.
- Areas along the edges of the NCOD boundary.

Prioritized neighborhoods, areas, and districts are found in Section 1.6 of this report (page 18).



2.2 NCOD BOUNDARY UPDATES





2.3 NEIGHBORHOOD DESIGN STANDARDS + GUIDELINES

The NCOD has design guidelines, updated in 2015, that are organized by use (residential or commercial) and treat the NCOD homogeneously without much differentiation between neighborhood character areas. More recently, sub-chapter 4B was created to specifically address development character, style and form in the B-3 Commercial Character Area. Design standards and guidelines encourage contextual development and work in concert with zone district regulations. A healthy mix of requirements and more flexible recommendations typically results in creative solutions that support and highlight important character defining features of each neighborhood.

WHAT WE HEARD:

Community feedback provided clear direction that the NCOD can do a better job defining and differentiating neighborhood character and encouraging more appropriate mass and scale adjacent to historic districts. Participants also responded that diversity of architecture and flexibility of design are areas for improvement within the NCOD.

In speaking with community members and an assessment of existing conditions, there appears to be support for a more flexible, innovative, and design-oriented approach to new buildings north of Main Street, and a more conservative, traditional approach to new buildings south of Main Street. The majority of Bozeman’s historic districts are located south of Main Street, and Bozeman’s historic industrial areas are north of Main Street which may explain this preference.

ADOPTED POLICY DIRECTION:

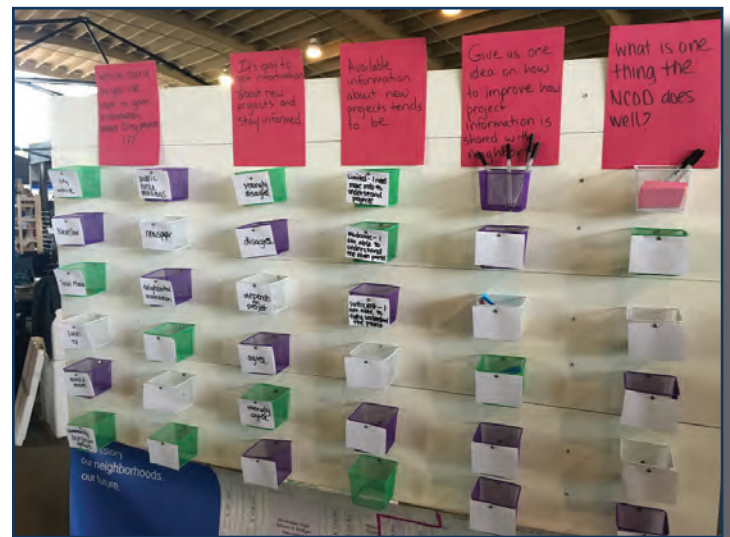
Create 3 sets of design standards and guidelines that are divided into a character area north of Downtown, a character area south of Downtown, and Downtown.

There should be general guidelines that support connectivity between the areas, create a common thread between neighborhoods, and support transitions between neighborhoods. Focus on large areas and eventually recognize special characteristics of each area and context.

Within each area, special standards are developed for blocks adjacent to historic districts or historic structures. Appropriate uses should be addressed within each chapter. Dividing the design guidelines and standards into north and south of Downtown, and an area specific to Downtown, recognizes differences between architectural styles, the history of industrial development in the neighborhoods north of Main Street, and differing sentiment toward ‘appropriate’ new development.

Creating design standards and guidelines is strongly recommended, but after an architectural inventory, or at the very least a windshield survey, is completed and zone districts are evaluated. A comprehensive architectural inventory highlights patterns, architectural characteristics, and overall neighborhood character that direct neighborhood boundaries and inform an appropriate mix of requirements and recommendations for each area.

There is an opportunity to incorporate the outcomes of the Downtown Bozeman Improvement Plan and the Community Plan as they relate to neighborhood character and future vision into a new design standards and guidelines document that balances new development and growth policy initiatives with existing neighborhood context.



STRATEGIC PLAN POLICIES 4.1.B, 4.4
 COMMUNITY PLAN GOALS 1.3, 3.3, 4.3
 DBIP GUIDELINE P.30
 DBIP RECOMMENDATION P. 112



CHAPTER 2 CORRELATION WITH ADOPTED PLANS

City of Bozeman planning staff provided an analysis of the 2009 Bozeman Community Plan and the 2018 Bozeman Strategic Plan compared to the draft NCOD recommendations. Correlations are indicated throughout the chapter and are found below.

2018 STRATEGIC PLAN

POLICY 4.1.B DEVELOP AND ALIGN INFILL POLICIES. (P.6)

Develop, adopt and align city policies for infill and redevelopment, economic development and public infrastructure.

POLICY 4.4 VIBRANT DOWNTOWN, DISTRICTS & CENTERS. (P.7)

Promote a healthy, vibrant Downtown, Midtown, and other commercial districts and neighborhood centers – including higher densities and intensification of use in these key areas.

POLICY 7.4.D STRATEGIC MUNICIPAL SERVICE DELIVERY EXPECTATIONS. (P.11)

Strategically manage community and employee expectations about the City's capacity to deliver services.

2009 COMMUNITY PLAN

GOAL 1.3, OBJECTIVE G-1 GROWTH MANAGEMENT. (P.13)

Promote the unique history and character of Bozeman by preserving, protecting, and enhancing the overall quality of life within the planning area.

GOAL 3.3, OBJECTIVE LU-1 LAND USE. (P.32)

Create a sense of place that varies throughout the City, efficiently provides public and private basic services and facilities in close proximity to where people live and work, and minimizes sprawl.

GOAL 3.3, OBJECTIVE LU-3 LAND USE. (P.33)

Strengthen the Historic Core of Bozeman to preserve the community character, economic resource, and historical connection represented by this area.

2019 DOWNTOWN BOZEMAN IMPROVEMENT PLAN

GUIDELINE. (P. 30)

Protect the character of the Main Street Historic District and enhance the residential neighborhoods through context-sensitive development.

RECOMMENDATION. (P.112)

Create downtown design guidelines.

CHAPTER 3

STRENGTHEN HISTORIC PRESERVATION PROGRAM





CHAPTER 3 ADOPTED POLICY RECOMMENDATIONS

3.1 PROGRAM IMPLEMENTATION

Phase-in a local historic preservation program.

3.2 DEVELOP INCENTIVES

Explore a variety of incentives for historic properties owners. Engage with historic property owners to ensure incentive relevance and clarity.

3.3 HISTORIC REVIEW PROCESS

Allow HPAB recommendations for historic projects and for projects within a historic district. Start HPAB review of demolitions as a way to ease into review authority.

3.4 HISTORIC PRESERVATION STANDARDS + GUIDELINES

Create historic preservation (HP) standards and guidelines.



CHAPTER 3 WORK PLAN

SHORT TERM	MID-TERM	LONG-TERM
Training for HPAB Members.		
Start HPAB review of demolition applications.	Process for HPAB recommendations for historic projects and projects within a historic district.	Locally designate National Register (NR) properties with owner consent.
Develop preservation plan with HPAB to identify preservation goals		
Explore a variety of incentives for historic properties and historic districts.	Adopt incentives for historic property owners.	Begin process to nominate new NR listings and boundaries for NR historic districts.
Conduct extensive outreach with historic property owner about possible incentives	Create historic design standards and guidelines for historic districts and landmarks that align with updated Sec. of Interior's Standards.	Begin process to amend NR listings and boundaries for NR historic districts.
Develop quick reference guides for appropriate repairs of historic properties.		



3 STRENGTHEN THE HISTORIC PRESERVATION PROGRAM

Historic preservation is not a one-size-fits all practice. There are guiding principles established by the Federal government, but it is up to communities to determine the appropriate preservation approach locally. Communities with a strong inventory of historic buildings oftentimes implement a customized local program that protects the vernacular historic buildings that do not always qualify for the National Register of Historic Places.

Vernacular buildings are a style of architecture that is specific to a local area. While nationally significant properties represent broader historic importance, Bozeman’s local vernacular creates a sense of place and pride for the community. Locally significant buildings that represent the evolution and development of Bozeman, important local people, or important community events, may not qualify for State or National Register listing but can be equally important to defining unique local character. It is up to the Bozeman community to determine what is important through a local preservation program that focuses on local history, addresses development pressures, and recognizes a sense of place for current and future generations. Buildings are authentic, tangible pieces of history that are irreplaceable once they are lost.

BOZEMAN HAS 46 HISTORIC BUILDINGS INDIVIDUALLY LISTED ON THE NATIONAL REGISTER AND 10 NATIONAL REGISTER HISTORIC DISTRICTS. THE NATIONAL REGISTER OF HISTORIC PLACES IS ADMINISTERED BY THE NATIONAL PARK SERVICE.

Bozeman has a voluntary historic preservation program with an advisory Historic Preservation Board. According to the Municipal Code, a property is considered historic if it *“is listed on the State or National Register of Historic Places, designated as a historic property under local or state designation law or survey, considered a contributing structure within a National Register Historic District or local historic district, or is deemed eligible by the City of Bozeman to be listed on the National or State Register of Historic Places individually or as a contributing building within an adopted or eligible historic district”*. Currently, there are parts of the Bozeman municipal code, such as local designation or local historic district status, which do not have specified review processes or criteria to be implemented which can be a barrier to a local historic preservation program.





3 STRENGTHEN THE HISTORIC PRESERVATION PROGRAM

There are 46 nationally listed historic properties and eight historic districts within the NCOD (two historic districts are outside the NCOD). These districts and historic properties were designated based on 1987 architectural surveys.

Bozeman also has significant post-World War II architecture that is eligible for National Register listing, as identified by Diana J. Painter in a Montana State Historic Preservation Office architectural context paper. In addition, the Marwyn Addition has been identified by local groups as a cohesive neighborhood of ranch style mid-century residential buildings. It is highly likely that the actual number of eligible historic properties both pre- and post-World War II, will increase with a new architectural inventory. Regardless of eligibility, the creation of a new National Register Historic District or an individual National Register listing requires consent from the landowner(s).

Since Bozeman does not have a current architectural inventory, a property owner is required to submit a historic inventory form to the City of Bozeman as part of an application for redevelopment within the NCOD to document any potential historic importance before alterations or demolition is undertaken. The onus is on the property owner and on Bozeman staff to document and evaluate the building either just before or at the same time that a development or demolition application is considered. This places the immediate aspirations of a property owner in potential conflict with the community's desire to preserve its history.

What is the National Register of Historic Places?

THE NATIONAL REGISTER IS A LIST OF INDIVIDUAL SITES, BUILDINGS, OBJECTS, OR DISTRICTS THAT HAVE DEMONSTRATED SIGNIFICANCE TO THE HISTORY OF A COMMUNITY, STATE OR THE NATION AND ARE WORTHY OF PRESERVATION.

THE NATIONAL REGISTER OF HISTORIC PLACES IS AN HONORARY DESIGNATION THAT DOES NOT PREVENT DEMOLITION OR SIGNIFICANT ALTERATIONS. PROPERTIES ON THE REGISTER MAY BE ELIGIBLE FOR CERTAIN TAX CREDITS.



First Baptist Church. Photograph courtesy Bozeman Public Library, <https://cdm15018.contentdm.oclc.org/digital/collection/p16013coll45/id/86/rec/15>.



Bozeman Downtown, courtesy of City of Bozeman.



3.1 PROGRAM IMPLEMENTATION

The Bozeman Municipal Code does not include criteria to designate local historic landmarks or local historic districts, and does not protect a historic building or potentially historic building from demolition. Maintenance standards are included in the Bozeman Code; however the standards are universal and not specific to historic properties. Standards for upkeep and maintenance are integral to a successful historic preservation program and should outline specific requirements to protect the longevity of a building and avoid demolition by neglect. For example, a historic building may be required to patch holes in a roof to slow structural deterioration.

WHAT WE HEARD:

Historic preservation is the most important aspect of the NCOD. Historic properties should be protected against demolition, and development regulations within historic districts should be strict. Support for an updated inventory is important to the community, not just to define the NCOD, but to also identify and to protect significant buildings.

“[The] NCOD was designed and created to protect historic areas and neighborhoods; it works as a cohesive area that defines the character of the Bozeman community.”

“[The NCOD] strives to consider the historic value of Bozeman neighborhoods and individual buildings as part of the planning process.”

ADOPTED POLICY DIRECTION:

Phase-in a local historic preservation program.

The program would apply to all local historic districts and local landmarks regardless of the NCOD boundary.

- Develop a preservation plan that articulates community preservation goals with an implementation agenda.
- Decide as a community what is important to protect and then ensure that historic resources are protected through stricter demolition criteria and specific maintenance standards for historic properties.
- Up-skill HPAB members with historic preservation trainings focused on reviewing projects against criteria and improving recommendations. The National Alliance of Preservation Commissions offers trainings specific to historic boards.

- Adopt local designation criteria and incentives that only apply to National Register listed properties, with owner consent. Test out a local landmark program on nationally designated properties to determine whether a local program is attractive to property owners and the community.
- Clear standards, objective criteria for landmark designation, and protections for designated buildings are integral to a local historic preservation program.
- Demolition criteria could be weighted depending on location. For example, stricter requirements would apply to eligible properties within a historic district as opposed to moderate requirements for eligible or historic properties outside a historic district.
- After completing an architectural inventory, write context papers on Bozeman’s local vernacular buildings identified in the survey that are not eligible for National Register status, but are important to Bozeman’s history.
- Develop handouts for historic property owners that offer quick reference guides to repairs based on national standards for historic preservation. Offer free consultations for historic properties to promote and inform maintenance and upkeep.
- Explore a conservation easement program or building rehabilitation fund to help maintain significant historic properties and prevent deferred maintenance.



STRATEGIC PLAN POLICY 1.2, 7.4.D
COMMUNITY PLAN GOAL 8.3



3.2 DEVELOP INCENTIVES

A voluntary landmark designation program can be very successful when there are reasons to designate a property. Incentives for historic structures encourage designation by balancing the additional layer of design review and required maintenance associated with historic status. Incentives can also compensate a property owner’s sense of responsibility and outright additional costs of preserving an historic resource. Finding an appropriate balance takes time and finesse to determine appropriate incentives that benefit property owners and do not negatively impact the community, neighborhood or other citywide goals.

WHAT WE HEARD:

Historic preservation is indisputably supported by the community. The community’s connection and dedication to protecting their local history through buildings were a common thread in the outreach feedback.

“Our historic neighborhoods are a treasure. Only Disney builds places like this anymore. Growth is happening, but take care not to ruin something so unique.”

“The NCOD and especially the historic neighborhoods need to be preserved and not overwhelmed by new, large scale, unattractive development.”

ADOPTED POLICY DIRECTION:

Explore a variety of incentives for historic properties owners. Engage with historic property owners to ensure incentive relevance and clarity.

The Municipal Code already allows deviations for historic properties which may be a meaningful incentive for some property owners. Each project has a different set of parameters and a different bottom line that can tip the scales toward voluntary designation or demolition. A list of incentives that provides a variety of options for different projects and a merit-based program to earn the benefits is recommended. Finding an appropriate balance between carrots and sticks, regulations and incentives, is the key to a successful voluntary historic preservation program that relies on property owners being willing participants.



STRATEGIC PLAN POLICY 4.1.B
COMMUNITY PLAN GOAL 8.3

SAMPLE INCENTIVE PROGRAM:

THE CITY IS COMMITTED TO PROVIDING SUPPORT TO PROPERTY OWNERS TO ASSIST THEIR EFFORTS TO MAINTAIN, PRESERVE AND ENHANCE THEIR HISTORIC PROPERTIES. RECOGNIZING THAT THESE PROPERTIES ARE VALUABLE COMMUNITY ASSETS IS THE BASIC PREMISE UNDERLYING THE PROVISION OF SPECIAL PROCEDURES AND PROGRAMS FOR DESIGNATED HISTORIC PROPERTIES AND DISTRICTS.

EXAMPLES OF INCENTIVES OFFERED IN OTHER COMMUNITIES INCLUDE:

- 1) ABILITY TO CONSOLIDATE ALL REQUIRED REVIEWS AT HPAB FOR EXPEDITED REVIEW PROCESS.
- 2) POTENTIAL FOR THE CITY TO PAY A PORTION OF THE CITY FEES ASSOCIATED WITH THE PROJECT.
- 3) A TRANSFERABLE DEVELOPMENT RIGHT PROGRAM TO TRANSFER FLOOR AREA OFF-SITE.
- 4) A CONSERVATION EASEMENT PROGRAM OR BUILDING REHABILITATION FUND.



3.3 HISTORIC REVIEW PROCESS

Under the current review process the Planning Director approves the majority of historic projects, while the Historic Preservation Advisory Board (HPAB) may provide recommendations. Currently there are about 100 Certificate of Appropriateness applications a year which are reviewed by staff planners – the Historic Preservation Officer acts as an internal referral agency. It is important to relate the scope of a project to the level of review. It is equally important to not over-regulate new development. Over-regulation can be a barrier to historic preservation projects and to voluntary landmark designation. One way to tackle this issue is to create a clear set of review criteria with thresholds for different levels of review by either Staff or the HPAB.

WHAT WE HEARD:

The review process is seen as ambiguous and inconsistently applied. The small groups expressed a desire for clarity and consistency in the review criteria, and for a better opportunity to comment on projects.

“Separate historic preservation from neighborhood preservation since they address different issues and needs.”

“Give clearer direction and quantitative review parameters for decision makers.”

“Review criteria more geographically based with reasonable quantitative evaluation criteria”

ADOPTED POLICY DIRECTION:

Allow HPAB recommendations for historic projects and for projects within a historic district. Start HPAB review of demolitions as a way to ease into review authority.

HPAB is a required referral agency for historic projects and any projects within a historic district. Definitive thresholds need to be developed to determine the appropriate review body. Minor development of non-contributing properties within historic districts, single family home, and/or small additions (i.e. less than 250 sf) to landmarks are examples of thresholds for a lesser review process than a new large mixed use building within a historic district or a large addition to a landmark.

HPAB recommendations would occur at a public hearing where notice is posted on the property to allow the public a

venue to comment and learn about the project. Other avenues to communicate with the public that could be considered as part of this alternative are listed in Chapter 6.

In addition to required recommendations, HPAB could also have the ability through a majority vote to require a project be reviewed by the Bozeman Commission rather than the Planning Director.

TOOLS FOR FUTURE DISCUSSION:

In the future, consider HPAB as a decision making body. A key component to the historic review process is to authorize the Historic Preservation Advisory Board to have final authority on certain projects, rather than just a recommendation. This creates a venue for formal review of a project during a public hearing. Board trainings are available to help HPAB differentiate its role as project advocate vs. board reviewer. This approach allows the Historic Preservation Officer to focus on long term goals such as the development of a local historic preservation program.

A noticed public hearing and formal review process with clear design guidelines and review criteria that are evaluated by the Historic Preservation Board with a recommendation by the Historic Preservation Officer is a more inclusionary, predictable, and oftentimes participatory process.



STRATEGIC PLAN POLICY 7.4.D

3.3 HISTORIC REVIEW PROCESS - CASE STUDIES

HISTORIC DISTRICT COMMISSIONS—A SUMMARY OF AUTHORITY

Many states grant cities the authority to establish commissions with broad authority to make recommendations, spend funds, hire professionals as needed, and approve exterior modifications and new construction in established historic districts. The following is a summary of such commissions in select states indicating their authority to grant certificates of appropriateness. Two states included in the summary specifically authorize staff to grant minor Certificate of Appropriateness (COAs) with appeals heard by the commission, although other states, especially those with home rule, may not allow staff level authority.

STATE	COMMON BOARD TITLE	SCOPE OF AUTHORITY	SAMPLE APPROVAL AUTHORITIES FOR HISTORIC DISTRICTS			STATUE/EXAMPLE
			RECOMMEND ONLY	COAs	APPEALS TO STAFF DECISIONS	
NC	Historic preservation or district commission	Broad		X	X	Statute
SC	Board of architectural review	Broad—set by zoning ordinance		X	X	Statute
ME	Historic district commission	Broad		X		Ellsworth, ME
IN	Historic preservation commission	Broad		X		South Bend, IN
SD	Historic preservation commission	Broad		X		Statute
ID	Historic preservation commission	Broad		X		Statute
WY	Historic preservation commission	Narrow—did not find any city with HPC approval authority	X			Casper Code Cheyenne
WA	Historic preservation commission	Broad		X		Spokane Code
UT	Historic preservation commission	Broad		X		Overview of state and local districts Statue
CO	Historic preservation commission	Broad		X	X	Mantio Springs Denver Code
OR	Historic preservation/resources commission	Broad		X		Admin Rules Independence
NV	Historic resources commission	Broad		X		Carson City Code Reno Code



3.4 HISTORIC PRESERVATION STANDARDS + GUIDELINES

The existing *Bozeman Guidelines for Historic Preservation and the Neighborhood Conservation Overlay District* document, adopted in 2006 and amended in 2015, address both historic preservation and new development throughout the entire overlay concurrently. A chapter is devoted to rehabilitation guidelines for historic properties and each historic district is allotted a few specific design guidelines. There are general design guidelines for the entire NCOD, and general suggestions for residential development versus commercial development. This document has served as a good foundation for the NCOD; however, an update to create a stronger distinction between historic preservation and neighborhood character is overdue. The existing guidelines and any future standards and guidelines must be based on the recently updated *Secretary of the Interior’s Standards for the Treatment of Historic Properties*.

WHAT WE HEARD:

Neighborhood character and historic districts should be addressed separately within the NCOD with special care given to transition areas between historic districts. Historic preservation of all designated historic districts is important to the community.

The Main Street, Story Mill, and the Bon Ton historic districts have the greatest mass and scale challenges with new development. Based on this feedback, updated design standards and guidelines need to specifically address mass and scale within these identified historic districts in addition to potential zone district boundary changes.

“The NCOD and corresponding regulations are the reason we have the charming Bozeman of today, and are necessary to retain this charm.”

ADOPTED POLICY DIRECTION:

Create historic preservation (HP) standards and guidelines.

The HP standards and guidelines should specify appropriate contextual alterations, remodels, and new buildings for each historic district. Standards will be requirements (with the ability to request a deviation) and guidelines will be recommendations. The HP standards and guidelines will build upon the principles of the Secretary of the Interior’s Standards, which will still apply, and will provide more detailed direction for each historic district to specifically address historic significance.

The HP standards and guidelines will be separate from the design standards and guidelines for non-historic properties and non-historic districts within the NCOD (discussed in Section 2.3, page 30). Creating the HP standards and guidelines is recommended after an updated architectural inventory is completed (see Section 1.6, page 18 for prioritized list of historic districts to be inventoried first).

The architectural inventory may result in the expansion of existing historic districts and will likely highlight character defining features and massing concerns specific to each historic district which should be addressed in the hp standards and guidelines. The hp standards and guidelines need to be relevant to existing conditions, reflect good historic preservation practice and encourage appropriate future development.



STRATEGIC PLAN POLICY 4.2
COMMUNITY PLAN GOALS 1.3, 3.3, 4.3



CHAPTER 3 CORRELATION WITH ADOPTED PLANS

City of Bozeman planning staff provided an analysis of the 2009 Bozeman Community Plan and the 2018 Bozeman Strategic Plan compared to the draft NCOD recommendations. Correlations are indicated throughout the chapter and are found below.

2018 STRATEGIC PLAN

POLICY 1.2 (P.2)

Broaden and deepen engagement of the community in city government, innovating methods for inviting input from the community and stakeholders.

POLICY 4.1.B DEVELOP AND ALIGN INFILL POLICIES. (P.6)

Develop, adopt and align city policies for infill and redevelopment, economic development and public infrastructure.

POLICY 4.2.D UPDATE HISTORIC PRESERVATION GUIDELINES. (P.6)

Update the Neighborhood Conservation Overlay District (NCOD) guidelines for historic preservation in downtown and other commercial districts and neighborhood centers. Promote continued investment in the city's inventory of historic structures relative to ongoing infill and redevelopment.

POLICY 7.4.D STRATEGIC MUNICIPAL SERVICE DELIVERY EXPECTATIONS. (P.11)

Strategically manage community and employee expectations about the City's capacity to deliver services.

2009 COMMUNITY PLAN

GOAL 1.3, OBJECTIVE G-1 GROWTH MANAGEMENT. (P.13)

Promote the unique history and character of Bozeman by preserving, protecting, and enhancing the overall quality of life within the planning area.

GOAL 3.3, OBJECTIVE LU-1 LAND USE. (P.32)

Create a sense of place that varies throughout the City, efficiently provides public and private basic services and facilities in close proximity to where people live and work, and minimizes sprawl.

GOAL 3.3, OBJECTIVE LU-3 LAND USE. (P.33)

Strengthen the Historic Core of Bozeman to preserve the community character, economic resource, and historical connection represented by this area.

GOAL 4.3, OBJECTIVE C-1.2 COMMUNITY QUALITY. (P.47)

Update design objectives to include guidelines for urban spaces and more dense development

GOAL 4.3, OBJECTIVE C-1.4 DESIGN GUIDELINES. (P.47)

Achieve an environment through urban design that maintains and enhances the City's visual qualities within neighborhood, community and regional commercial areas.

GOAL 8.3, OBJECTIVE ED-3 ECONOMIC DEVELOPMENT. (P.76)

Recognize the importance of quality of life elements in attracting and developing economic activity.

CHAPTER 4

RELATE ZONING TO CONTEXT





4 ADOPTED POLICY RECOMMENDATIONS

4.1 INFILL TRANSITIONS

Study of the B-3 transition zone should be a mid- or long-term priority rather than an immediate priority.

4.2 RELATE ZONE DISTRICTS TO CONTEXT

Historic Districts: Explore adjusting the historic district boundaries to relate to the existing zone districts. Gather more data after the architectural survey and design guidelines and standards are completed. Use tools such as 3-D modeling to understand zoning, mass and scale.

4.3 RELATE ZONE DISTRICTS TO CONTEXT

Non-Historic Districts: Consider aligning zone district allowances with neighborhood character. Gather more data after the architectural survey and design guidelines and standards are completed. Use tools such as 3-D



CHAPTER 4 WORK PLAN

SHORT TERM

Map review process and identify redundant requirements and areas of overlap for projects within the NCOD: i.e Article 5, Site Plan Review, Project Review...

MID-TERM

Analyze zone districts:
ID where dimensional requirements and boundaries conflict with neighborhood character/future vision, or historic district boundary.

LONG-TERM

Amend zone district requirements to relate to neighborhood (or historic district if applicable) character (either existing or future vision).

Create design standards and guidelines specific to the B3 zone district. Reference and align design standards and guidelines with the adopted DBIP.

Create transition specific standards and guidelines that are context based and replace Article 5 standards (where it is redundant) for projects within NCOD.

Gather more data after the architectural survey and design guidelines and standards are completed. Use tools such as 3-D modeling to understand zoning, mass and scale.



4 RELATE ZONING TO LOCAL CONTEXT

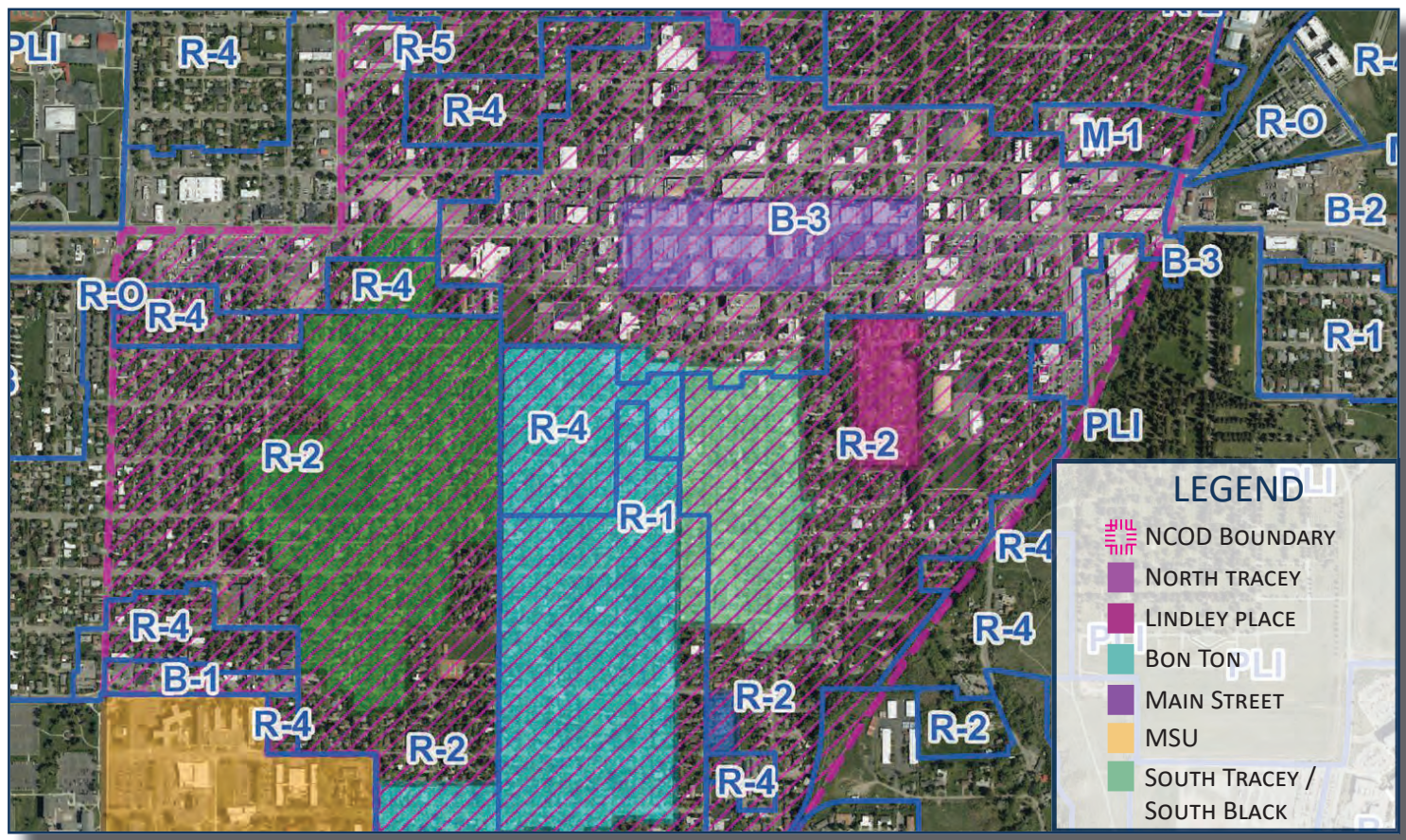
The Bozeman community places a very high value on neighborhood character within the NCOD. The purpose of the NCOD, as a design overlay for both historic districts and non-historic districts, is only part of the story. The NCOD discussion is not binary – there are many other factors at play. Recent discontent around tall projects adjacent to small scale residential neighborhoods highlights a potential disconnect between the dimensional allowances such as height, setbacks, and floor area of the zone districts and appropriate contextual development within the NCOD.

mix of design overlay and buffer overlay districts to promote and to support neighborhood context. However, it is virtually impossible to create design guidelines that make a new, tall, multi-story building relate to a single story bungalow.

The abrupt height and mass transitions between historic and non-historic districts has influenced negative community sentiment toward the NCOD and an overall feeling that the NCOD needs to be improved.

The NCOD uses the *Bozeman Guidelines for Historic Preservation and The Neighborhood Conservation Overlay District* to inform new construction, and the 2015 NCOD audit suggests a

- STRATEGIC PLAN POLICY 7.4.D
- COMMUNITY PLAN GOALS 3.3 AND 4.3
- DBIP RECOMMENDATION P. 110
- DBIP RECOMMENDATION P. 116





4.1 INFILL TRANSITIONS

The historic districts, residential neighborhoods and mixed-use downtown core found within the Neighborhood Conservation Overlay District represent some of the most desirable real estate in the city, elevating redevelopment potential and prompting serious consideration – and concern – regarding infill development in the area. Some of the existing zone districts located in the NCOD have allowed for development over time that is not always characteristic of adopted historic districts or non-historic neighborhoods. This disconnect between traditional zoning practice and neighborhood character results in projects that may meet the code (and the existing form and intensity standards) but are not always responsive to the surrounding neighborhood, prompting frustration and distrust toward infill development, especially within the NCOD.

Within the scope of the NCOD project, the focus is to address community concern over mass, scale and density issues that impact neighborhood character within the district. In order to do so, an evaluation of the zone districts present within the NCOD boundary was necessary to understand how existing standards influence development within the district and pinpoint opportunities for greater compatibility and stronger implementation. The

B-3 Downtown Business District and its relationship to the established historic districts and overall NCOD boundary became an important part of this evaluation, based on input from stakeholders and community members.

The intent of the B-3 zone is ‘to provide a central area for the community’s business, government service and cultural activities with urban residential development as an essential supporting use.’ Encouraging mixed use development with a healthy balance of business, civic, cultural and residential uses are central to a healthy downtown district. In other communities, allowing urban residential uses as part of a high density downtown district has unintentionally created situations where the highest and best use of a property is top-shelf residential developments. The Downtown Bozeman Partnership is currently working on an updated Downtown Bozeman Improvement plan that will address the B-3 zone district and areas for infill and higher density development. In addition, the Bozeman Community Plan is being updated which will also pinpoint areas for growth and development and will reflect long term vision of the community.



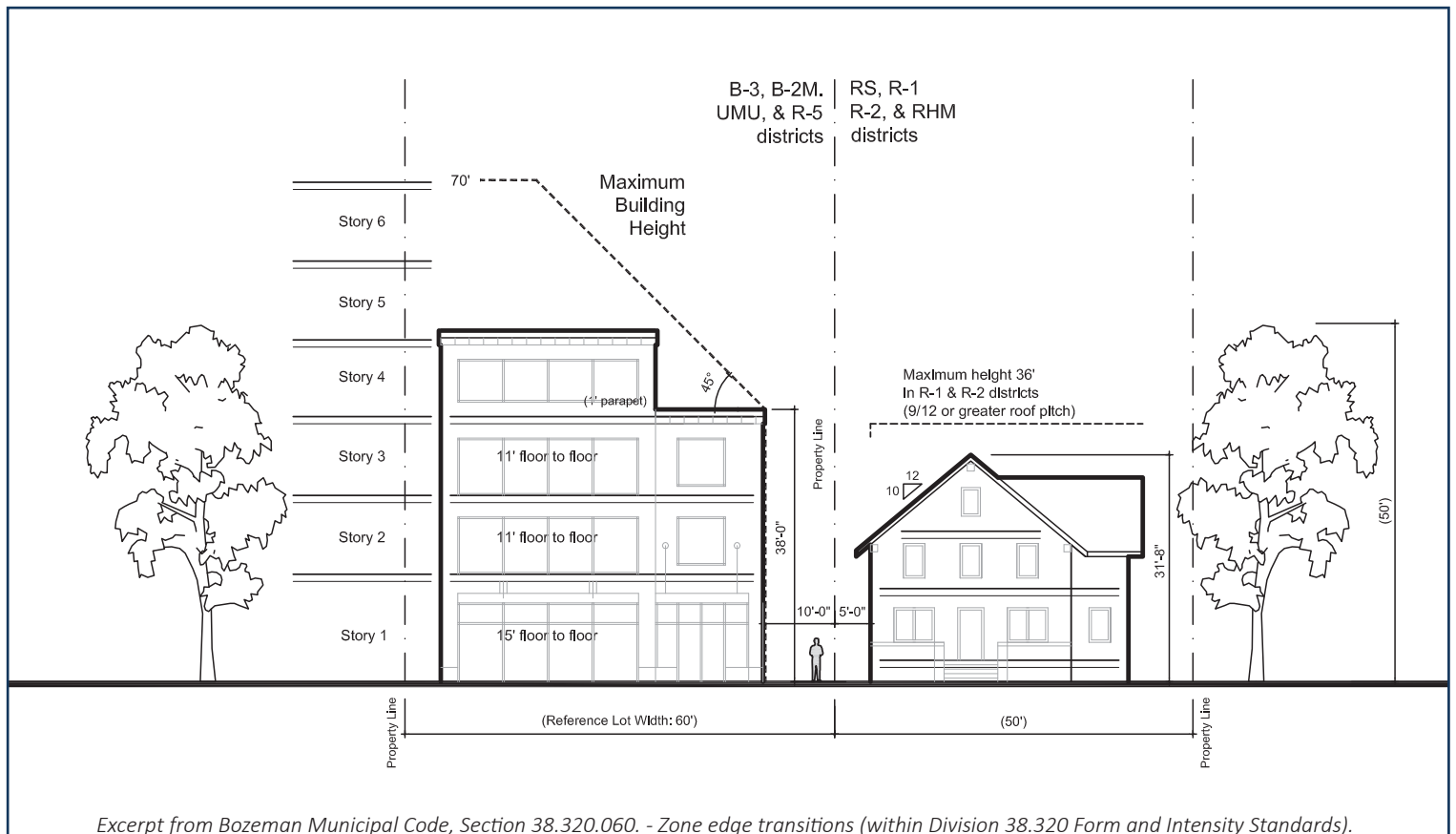


4.1 INFILL TRANSITIONS

The B-3 ‘downtown district’ zone highlights an opportunity for a softer, context-appropriate transition between higher density and taller buildings and small low density neighborhoods. A sensitive solution is required to meet the goals and intent of the zone district while balancing historic and neighborhood preservation of the areas that abut the B-3 boundary. To further complicate this balance, the Main Street historic district is located in the middle of the B-3 zone. Allowable building heights along Main Street are lower than height allowances outside the historic district and within the B-3 zone. Different height requirements within the zone district recognize historic context along Main Street; however, this pushes taller buildings toward low scale residential neighborhoods located to the north and south. Setback and height restrictions established by the application of zone edge transition areas address this

issue within B-3 and properties immediately adjacent to residential R-2 districts, but may not go far enough to address neighborhood character beyond mass and scale or consider infill in a holistic manner that looks beyond that immediate edge.

The B-2M ‘community business district-mixed’ zone district is a new district adopted in 2017 that is a hybrid between B-3 and the more suburban B-2 zone district. The stated intent of B-2M is to function as a vibrant mixed-use district that accommodates substantial growth and enhances the character of the city. B-2M zoning is presently located along the western boundary of the NCOD, between Main and Peach Streets, and may serve as an opportunity zone to capture future infill development within the district.



Excerpt from Bozeman Municipal Code, Section 38.320.060. - Zone edge transitions (within Division 38.320 Form and Intensity Standards).



4.1 INFILL TRANSITIONS

WHAT WE HEARD:

Locating new infill development anywhere within the NCOD received moderate community support; however majority support was for outside the NCOD or along the 7th Street corridor. This is consistent with the City’s recent up-zoning of the 7th Street corridor to accommodate additional density and intensity of development.

It is important to note the different perceptions around what constitutes infill. For some people infill is large high density development, and for others infill is all new development regardless of density or size. High density development can also take on different meanings among residents. For some, high-density means an intense concentration of uses, both vertically and horizontally, reflective of larger urban areas like Denver, Seattle or Portland. For others, high-density could be any use or development more intense than single-family residential; in a city the size of Bozeman sometimes any new or additional development feels higher in intensity than what currently exists.

“Lack of buffer zone between new development and existing neighborhoods is hurting the community of the neighborhoods which is difficult to see unless you are living in the neighborhood. Our neighborhoods are not just brick and mortar we are people. The hard line between commercial and residential zoning needs a buffer.”

The Bozeman Community Plan is currently being revised. The final document will provide context and future vision for this decades old discussion around increasing density downtown and protecting the essence of the Bozeman community.

ADOPTED POLICY DIRECTION:

Study of the B-3 transition zone should be a mid- or long-term priority rather than an immediate priority.

There is some acceptance by the community that new development is going to happen in the NCOD. Results from pointed questions on where developments should occur, as well as our assessment of the massing and character of existing development within the NCOD boundary, informed our recommendation to rethink the B-3 District boundary within the NCOD. How this boundary is re-considered could be approached from multiple directions: from modifying the boundary of the B-3 district to better align with existing historic districts, to creating a new mixed use district that serves as a transitional zone between B-3 and the residential neighborhoods, or expanding upon the existing zone edge transition requirements to better address form and character in these transitional areas.

Using streets to delineate the boundary creates a physical break between zone districts. The established neighborhoods and historic districts located to the south of downtown dictate a very clear boundary between traditional neighborhood development and the B-3 zone; our recommendation, regardless of any of the options presented, is for the City to consider aligning the southern B-3 district boundary with the existing historic districts to the south of Babcock Street. To balance an adjusted B-3 zone, incentivizing redevelopment within areas zoned for B-2M along the North 7th corridor should be considered to take advantage of recent upzoning in this area and the desire to see additional infill along this corridor.



STRATEGIC PLAN POLICIES 4.1.B AND 4.4
COMMUNITY PLAN GOAL 1.3
DBIP GUIDING PRINCIPLE P.30



4.1 INFILL TRANSITIONS

TOOLS FOR FUTURE DISCUSSION:

Tools to consider in the future are provided as options that address the delicate balance between incentivizing infill and supporting historic preservation and enhancing neighborhood character.

1) Create a B-3 transitional zone (B-3T) for areas located beyond the core downtown district.

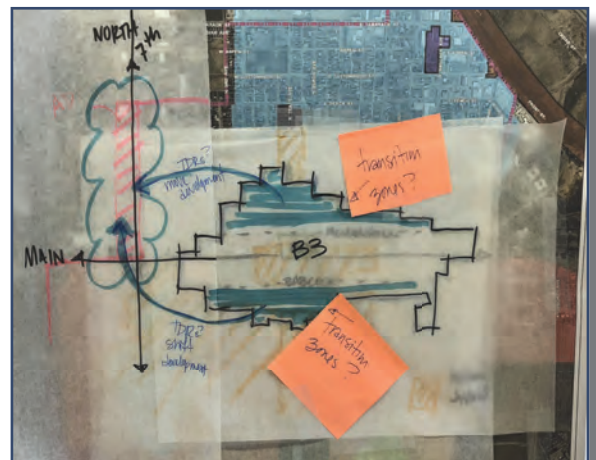
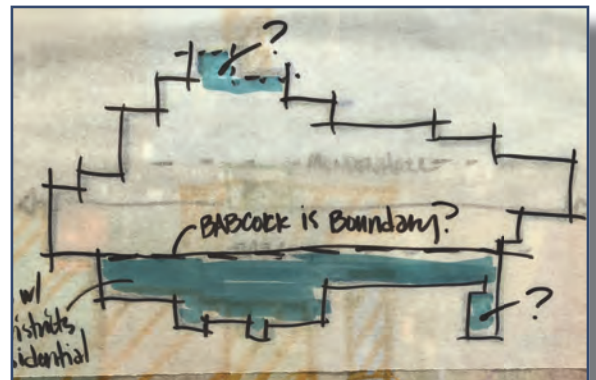
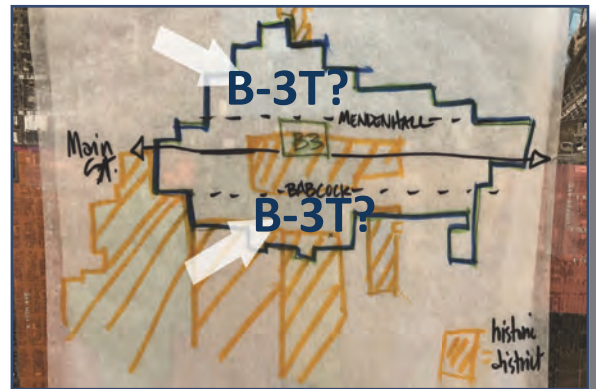
This could be an overlay district or separate zone district (B-3T) that would apply to properties located between Babcock and the existing B-3 boundary to the south, and Mendenhall and the existing B-3 boundary to the north. The intent of the existing B-3 zone would remain in place, with massing, scale, site design and other dimensional requirements adjusted to better align with a transitioning commercial, mixed use to residential, mixed use neighborhood. Design standards and guidelines developed to maintain the character of the area would further refine where and how infill development would occur within this zone.

2) Incorporate additional site design standards within the existing zone edge transition requirements.

Similar to the recommendation above, but working within the existing municipal code framework, additional site design standards could be incorporated within Section 38.320.060 of the City’s municipal code addressing compatible transitions between high density and low density districts. Façade articulation, transparency, construction materials, roof type, landscaping and other design requirements could be incorporated – in addition to existing height and setback requirements – to further define the character of the transition zone and extend it beyond immediately adjacent properties.

3) Incentivize redevelopment along North 7th through TDRs.

Using a combination of the above options establishing a transitional zone along the B-3 “edge”, encourage infill development within the expanded NCOD district along North 7th Avenue by allowing developers to shift density from the transitional zone into the B-2M zone. This may be accomplished in concert with a slight expansion to the B-2M district’s eastern boundary, depending on the guidance and direction resulting from the City’s community plan update, landowner input, and the adopted downtown plan update.





4.2 RELATE ZONE DISTRICTS TO CONTEXT

Zone district analysis is not exactly within the scope of the NCOD project; however, there are definite areas of overlap in terms of mass, scale, and neighborhood character. Bozeman is currently working on a community plan update and a downtown plan update that will most likely address changes to the zoning map.

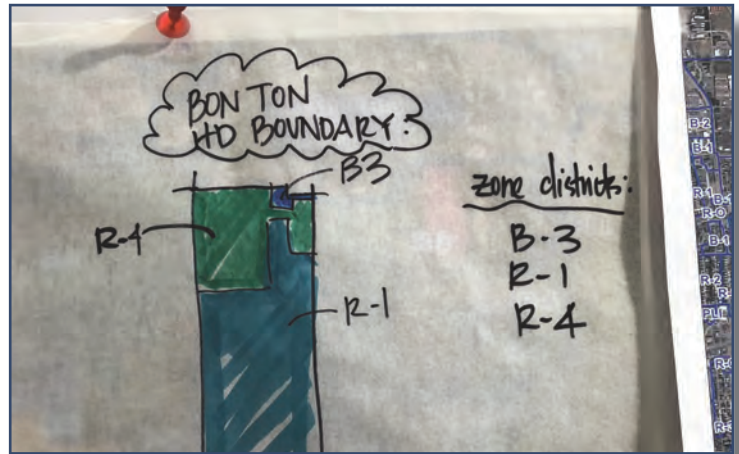
Disconnect between zone district boundaries and neighborhood character occur throughout the NCOD, most notably within designated historic districts that have a defined and cohesive architectural style. Approved projects within the B-3 zone district directly adjacent to designated historic districts, highlight incompatibility between neighborhood character and dimensional allowances within a zone district.

The Bon Ton, Story Mill, and Cooper Park Historic Districts have more than one zone district within the historic district boundary - for example, the Bon Ton Historic District has R-1, R-4 and B-3 zoning. Allowed heights in the R-1 Zone District (36 ft. max) are lower than the R-4 Zone District (44 ft. max), and significantly lower than the B-3 Zone District (70 ft. max outside the core). The historic buildings within the Bon Ton Historic District range from 1 story to 2 1/2 stories in height on average, which is significantly lower than a 44 ft. building allowed in R-4.

Numerous zone districts within one cohesive historic district can be frustrating for residents, property owners and Bozeman staff/review boards when a project meets zoning allowances but does not relate to the historic context of the neighborhood. This places a strain on the review process and can result in new development that degrades and erodes the cohesion of the historic district.

Changes to the zone district map should be considered in concert with the community plan and the downtown plan updates. Zoning amendments should also be informed by other community wide goals such as infrastructure updates for new construction, on-street and off-street parking needs, affordable housing needs, and many other growth and development topics.

The National Register of Historic Places describes the Bon Ton Historic District as “Bozeman’s finest examples of historic residential architecture, spanning from the early 1880s to the mid-1930s, constitute the bulk of the 228 buildings in the Bon Ton Historic District.”



WHAT WE HEARD:

Through our analysis and discussion with participants the Main Street Historic District and surrounds was identified as having the greatest mass and scale challenges with new development.

Many participants reference recent tall developments in the B-3 zone adjacent to residential neighborhoods, as evidence that the NCOD needs to better protect neighborhood character. Rather than design, the review process, or neutral options, participants selected the size of building and the scale of new development as the biggest issues with new development in the NCOD.

Based on community input, we found that there is overall community concern with the pace and size of new growth and development throughout Bozeman. Specific concerns within the NCOD ended up relating largely to projects approved under the B-3 zone district and Design Guideline Subchapter 4B which is specific to the B-3 zone.



4.2 RELATE ZONE DISTRICTS TO CONTEXT

ADOPTED POLICY DIRECTION: (HISTORIC DISTRICTS)

Explore adjusting the historic district boundaries to relate to the existing zone districts.

Gather more data after the architectural survey and design guidelines and standards are completed. Use tools such as 3-D modeling to understand zoning, mass and scale.

After an updated architectural inventory of the NCOD is completed, determine whether existing historic district boundaries need adjustment and identify eligible future historic districts within the NCOD. Consider historic preservation incentives that off-set any “down zoning” that may occur when zone district boundaries and dimensions are adjusted.

TOOLS FOR FUTURE DISCUSSION:

1) Explore adjusting the historic district boundaries to relate to the existing zone districts.

If an architectural inventory is not feasible at this time, boundary adjustments can be made based on current information and a windshield survey. However, adjustments to the historic district boundary must not jeopardize the integrity of the historic district by including areas that do not have a high level of significance and do not contribute to the historic district. On the other hand, historic districts should not exclude important historic properties in order to align zone districts with historic districts as this would be counter-productive. This alternative may involve amending the National Register of Historic Places historic district designation unless local historic districts are adopted.

2) Develop an historic preservation overlay zone in place of amending zone district boundaries.

This approach applies cohesive design standards and dimensional requirements within a historic district, and is similar to the Main Street historic district which is located within the B-3 zone district. Within the B-3 boundary, different dimensional standards apply to properties inside the Main Street historic district as opposed to outside the district.

ADOPTED POLICY DIRECTION: (NON-HISTORIC NEIGHBORHOODS)

Consider aligning zone district allowances with neighborhood character.

Gather more data after the architectural survey and design guidelines and standards are completed. Use tools such as 3-D modeling to understand zoning, mass and scale.

New design overlay districts and neighborhood specific design guidelines are not the singular answer to the mass, scale and incompatibility issues voiced by the community. To successfully address the concerns in non-historic neighborhoods we recommend a multi-pronged approach that starts with aligning dimensional requirements and allowed uses in the NCOD zone districts to neighborhood character and the future vision for each neighborhood. Design guidelines should be considered after an architectural inventory or windshield survey of the NCOD is completed and after zone districts are amended.

TOOLS FOR FUTURE DISCUSSION:

1) Update the form and intensity standards to better address concerns about mass and scale.

The form and intensity standards are form based code that were recently adopted by the Bozeman Commission. Note: it may be premature to update the form and intensity standards that have not been adequately tested. Sample case studies could shed light on the applicability of the form and intensity standards and whether Alternative 1 is an appropriate option.

2) Update current design guidelines and add design standards to better address concerns about mass and scale.

New design standards can encourage thoughtful design elements that reduce the perception of mass and scale and can require architectural elements, such as front porches or large street facing windows, that relate new development to surrounding character. New design standards and guidelines for neighborhoods are addressed in Chapter 2 of this document.



STRATEGIC PLAN POLICY 4.4
COMMUNITY PLAN GOAL 1.3
DBIP GUIDING PRINCIPLE P.30



CHAPTER 4 CORRELATION WITH ADOPTED PLANS

City of Bozeman planning staff provided an analysis of the 2009 Bozeman Community Plan and the 2018 Bozeman Strategic Plan compared to the draft NCOD recommendations. Correlations are indicated throughout the chapter and are found below.

2018 STRATEGIC PLAN

POLICY 4.1.B DEVELOP AND ALIGN INFILL POLICIES. (P.6)

Develop, adopt and align city policies for infill and redevelopment, economic development and public infrastructure.

POLICY 4.4 VIBRANT DOWNTOWN, DISTRICTS & CENTERS. (P.7)

Promote a healthy, vibrant Downtown, Midtown, and other commercial districts and neighborhood centers – including higher densities and intensification of use in these key areas.

POLICY 7.4.D STRATEGIC MUNICIPAL SERVICE DELIVERY EXPECTATIONS. (P.11)

Strategically manage community and employee expectations about the City’s capacity to deliver services.

2009 COMMUNITY PLAN

GOAL 1.3, OBJECTIVE G-1 GROWTH MANAGEMENT. (P.13)

Promote the unique history and character of Bozeman by preserving, protecting, and enhancing the overall quality of life within the planning area.

GOAL 3.3, OBJECTIVE LU-3 LAND USE. (P.33)

Strengthen the Historic Core of Bozeman to preserve the community character, economic resource, and historical connection represented by this area.

GOAL 4.3, OBJECTIVE C-1.2 COMMUNITY QUALITY. (P.47)

Update design objectives to include guidelines for urban spaces and more dense development.

MAY 2019 DOWNTOWN BOZEMAN IMPROVEMENT PLAN

GUIDING PRINCIPLE “MORE THAN A MAIN STREET” (P. 30)

Protect the character of the Main Street Historic District and enhance the residential neighborhoods through context-sensitive development.

RECOMMENDATION P. 110

Adjust the B-3 District Boundary to Eliminate Land Use and Scale Conflicts.

RECOMMENDATION P. 116

Explore “Gentle” Residential Infill.

CHAPTER 5

STREAMLINE PROCESS





5 ADOPTED POLICY RECOMMENDATIONS

5.1 NCOD REVIEW PROCESS (NON-HISTORIC):

Ensure the review process is understandable and streamlined.



CHAPTER 5 WORK PLAN

SHORT TERM

MID-TERM

LONG-TERM

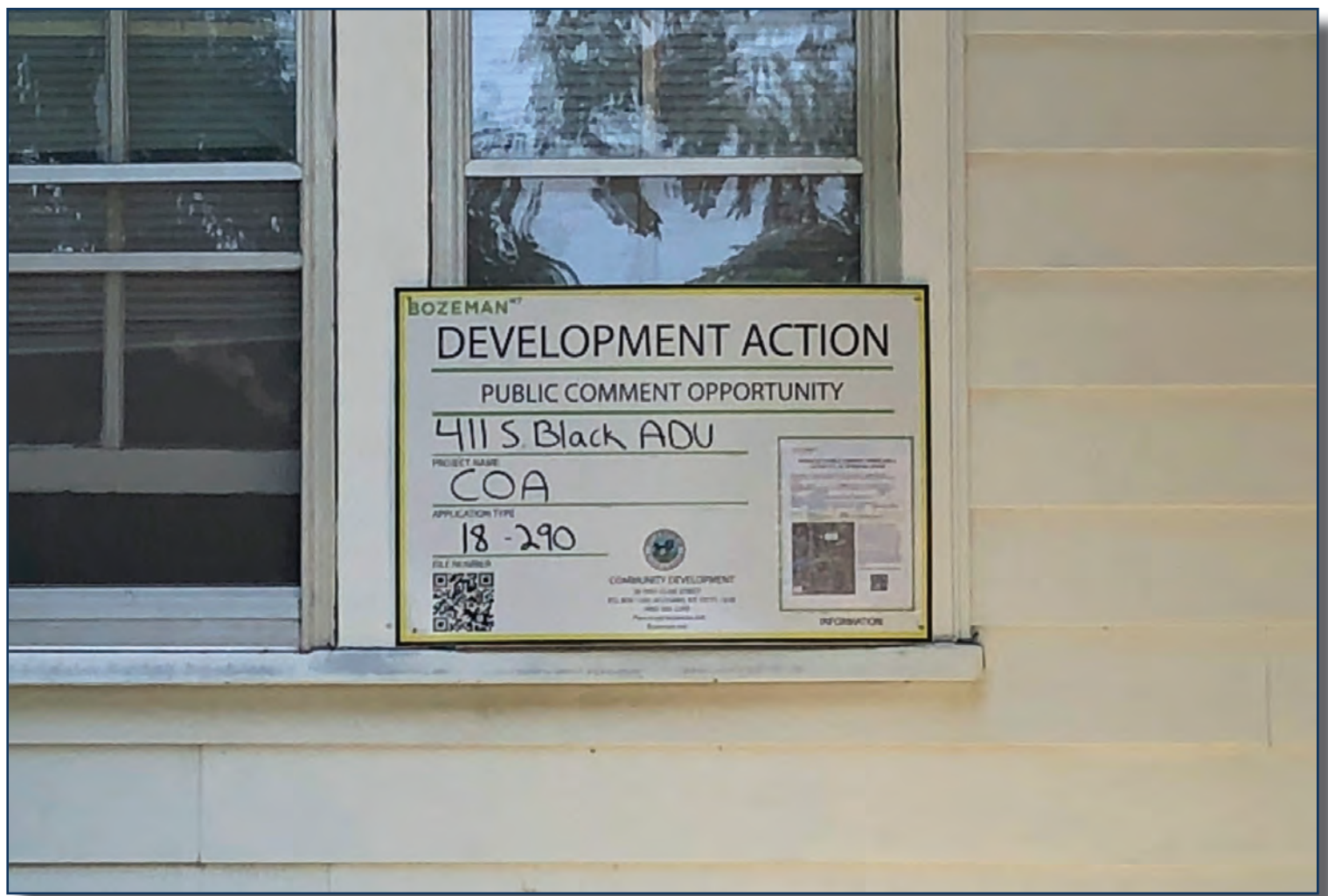
Exempt the NCOD from duplicative review processes and replace with context derived standards and guidelines.



5 STREAMLINE PROCESS

There are numerous requirements and reviews that may apply to projects within the NCOD including: a Certificate of Appropriateness, Sketch Plan Review, Form and Intensity Standards within each zone district, and Project Design Review to name a few. These multiple layers can create confusion for neighbors. The City of Bozeman developed handouts that simplify application requirements to be accessible and understandable to a wide range of users.

The number of differing reviews increases the potential for conflicting standards that need to be rectified throughout the review process. In our experience, this can cause applicants to feel that the process is arbitrary. The Municipal Code has thresholds to determine when a recommendation is required from the Design Review Board (DRB). These thresholds are specific to large developments with 45 or more dwelling units or are a minimum of four stories, and provide a good foundation to build on. Based on community input, there is a desire to address the review process and provide a more concise framework that is easy to follow.





5.1 NCOD REVIEW PROCESS (NON-HISTORIC)

WHAT WE HEARD:

Clear review criteria, an understandable process, and a streamlined review are areas that need improvement according to the small group meeting participants. Placing more weight on public comment and Design Review Board (DRB) recommendations is desired; and, relating scope to level of review process is recommended by the small group meeting participants.

Overall, participants felt that the review process for new development is slightly tilted to developers with some participants agreeing that the review process is balanced.

“Let’s have developers collaborate with the neighborhood they seek to develop within so that we can get projects that truly meet the needs and fit the character of the particular neighborhood.”

“There should be room for deviation from existing community character, if the proposed building’s architecture is world-class, contemporary.”



ADOPTED POLICY DIRECTION:

Ensure the review process is understandable and streamlined.

Map out the different review processes to determine overlap and areas to simplify and consolidate. For example, explore the advantages and disadvantages to exempting the NCOD from form and intensity standards in zone districts (and possibly other review processes) and instead use context derived design guidelines (recommendations) and standards (requirements).

Develop review criteria that is objective and allows some flexibility. This can be achieved through a mix of regulations, design standards and design guidelines.

TOOLS FOR FUTURE DISCUSSION:

1) Require a binding design review process with the Design Review Board (non-historic properties).

The DRB would be authorized to make the final decision on design review, while still enabling the Bozeman Commission to consider a large project for review when certain thresholds or requirements are met. At the same time, lower the thresholds that triggers DRB review to include smaller projects to balance the recommendation requiring a design review process for large projects.

This is a significant change to the Bozeman Municipal Code and requires a commitment to training the DRB to apply review criteria. A large majority of established communities implement a similar review structure with design review boards, historic preservation boards, planning boards, and/or zoning boards conducting quasi-judicial procedures to review projects that fall between a staff level review and a comprehensive review by elected officials. Under this process, planning staff continues to approve minor projects and provides expertise and recommendations to the review body during a project review.



STRATEGIC PLAN POLICIES 4.2.D, 4.4, 7.4.D
COMMUNITY PLAN GOALS 1.3, 3.3, 4.3



CHAPTER 5 CORRELATION WITH ADOPTED PLANS

City of Bozeman planning staff provided an analysis of the 2009 Bozeman Community Plan and the 2018 Bozeman Strategic Plan compared to the draft NCOD recommendations. Correlations are indicated throughout the chapter and are found below.

2018 STRATEGIC PLAN

POLICY 4.2.D UPDATE HISTORIC PRESERVATION GUIDELINES. (P.6)

Update the Neighborhood Conservation Overlay District (NCOD) guidelines for historic preservation in downtown and other commercial districts and neighborhood centers. Promote continued investment in the city's inventory of historic structures relative to ongoing infill and redevelopment.

POLICY 4.4 VIBRANT DOWNTOWN, DISTRICTS & CENTERS. (P.7)

Promote a healthy, vibrant Downtown, Midtown, and other commercial districts and neighborhood centers – including higher densities and intensification of use in these key areas.

POLICY 7.4.D STRATEGIC MUNICIPAL SERVICE DELIVERY EXPECTATIONS. (P.11)

Strategically manage community and employee expectations about the City's capacity to deliver services.

2009 COMMUNITY PLAN

GOAL 1.3, OBJECTIVE G-1 GROWTH MANAGEMENT. (P.13)

Promote the unique history and character of Bozeman by preserving, protecting, and enhancing the overall quality of life within the planning area.

GOAL 3.3, OBJECTIVE LU-3 LAND USE. (P.33)

Strengthen the Historic Core of Bozeman to preserve the community character, economic resource, and historical connection represented by this area.

GOAL 4.3, OBJECTIVE C-1.2 COMMUNITY QUALITY. (P.47)

Update design objectives to include guidelines for urban spaces and more dense development.

GOAL 4.3, OBJECTIVE C-1.4 COMMUNITY QUALITY. (P.47)

Achieve an environment through urban design that maintains and enhances the City's visual qualities within neighborhood, community and regional commercial areas.



CHAPTER 6

PROJECT INFORMATION





6 POLICY RECOMMENDATIONS SUMMARY

6.1 PROJECT INFORMATION

Strengthen existing project information channels and work on push notifications City-wide.

6.2 PROJECT INFORMATION

Develop a plan to have public meetings prior to application review with impacted neighbors. Collect input from neighbors on large scale projects. Add noticing requirements with area radius. Develop minimum standards that applicant has to meet. Develop clear thresholds that trigger review.



CHAPTER 6 WORK PLAN

SHORT TERM

Strengthen existing project information channels and work on push notifications City-wide.

MID-TERM

Develop a plan to have public meetings prior to application review with impacted neighbors. Collect input from neighbors on large scale projects. Add noticing requirements with area radius. Develop minimum standards that applicant has to meet. Develop clear thresholds that trigger review.

LONG-TERM



6 PROJECT INFORMATION

The City of Bozeman requires mailed and posted notices that include information about the project, contact number, and the date of a public hearing for specific types of projects. In addition, the City of Bozeman is currently working on expanding web access to development project information and advisory board agendas with links to packet material. A Certificate of Appropriateness in the NCOD does not require posting of notice prior to approval; rather, the Municipal Code may require notice be posted on the property that describes the scope of the already approved project. Administrative reviews at the staff level do not have required public noticing prior to the decision. By their very nature, staff reviews are for projects that comply with code requirements and a Certificate of Appropriateness can be issued quickly without slowing down development momentum.

WHAT WE HEARD:

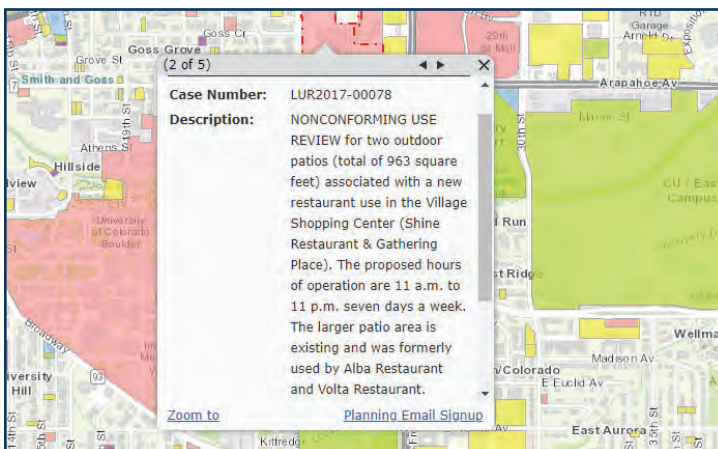
Project information is mostly found in the newspaper, on the city website, and through word of mouth. Most participants feel that available information provides enough detail to understand the main points of a project.

“ALL of these sources and several times IN ADVANCE- you can’t advertise too much”

“Send out texts with development/proposal info to folks within a five block radius.”

“Continue to utilize GIS in a useable format so the public can see proposed projects early in the process and have a chance to comment.”

“Neighbors directly affected deserve a direct communication.”



City of Boulder, GIS, Development Review Cases.

ADOPTED POLICY DIRECTION:

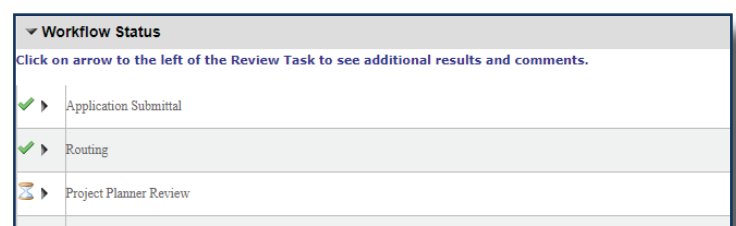
Strengthen existing project information channels.

Go beyond the standard posting, mailing, and publishing, and provide information to the area surrounding the project prior to the first hearing or staff determination. The City of Bozeman has a robust award-winning GIS Department and webpage. The information that is available online includes layers that illustrate projects that are under initial review, on hold, are within a public noticing, under final review, and approved.

In speaking with the community and reviewing the website, there is an opportunity to work within the existing GIS layers to add additional information. Examples from other cities include a summary of the project proposal, more detailed application status, and associated permits.

Options to explore:

- Working with GIS Department and web administrators on how to integrate additional information into the existing GIS layers and website to make detailed project information more readily available to the public.
- Educational campaign through City social media channels discussing where to find planning project information.



City of Fort Collins, GIS, Citizen Portal.



6 PROJECT INFORMATION

ADOPTED POLICY DIRECTION:

Increase opportunity for community awareness through noticed public hearings.

Pushing more projects and review authority to the DRB or HPAB will automatically generate a forum to gather information during project review and may result in more community awareness of ongoing projects.

Options to explore:

- A required meeting prior to application review with the neighborhoods impacted by the project.
- To take it a step further, required input from the neighborhood association on large scale projects could be explored. For example, in Pitkin County Colorado, specific areas within the County have formed caucuses that are required to provide a recommendation to the reviewing body on large projects within their area.



