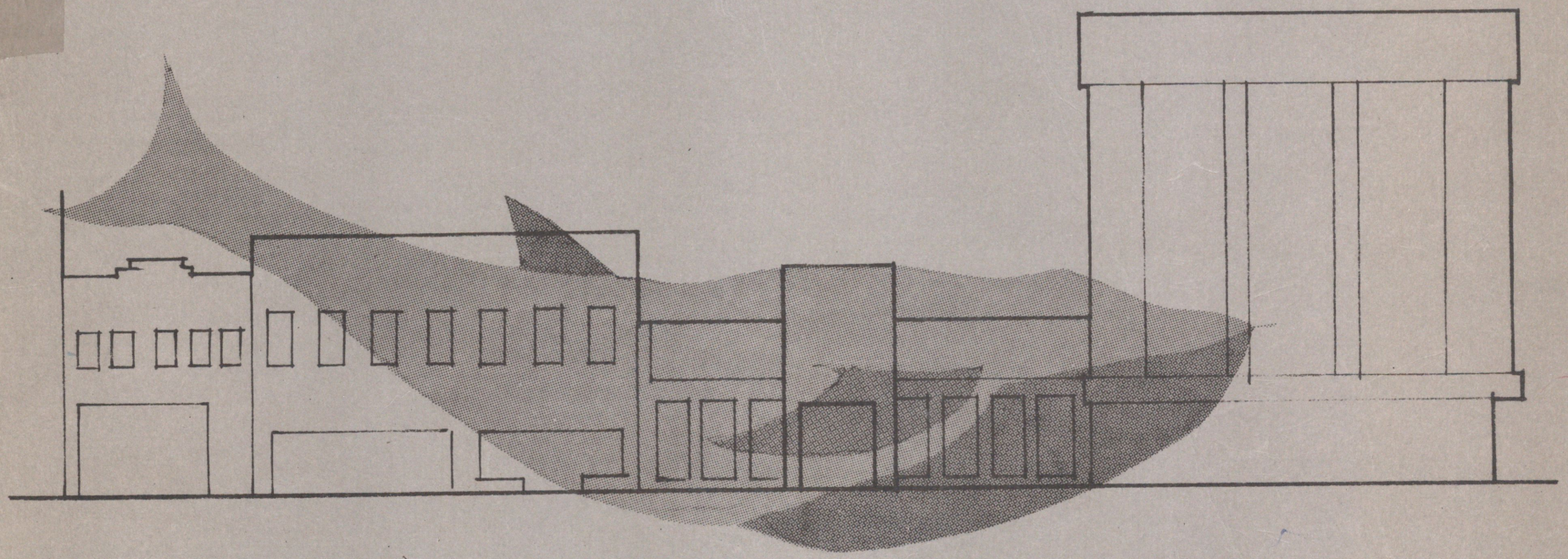


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SAVE THE WHALES

by

David E. Miner

A professional paper submitted in partial fulfillment
of the requirements for the degree

of

BACHELOR OF ARCHITECTURE

Approved:

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Montana State University
Bozeman, Montana
March 16, 1981

To the residents of Bozeman, Montana
in an attempt to make them aware of
their historical past.

For their invaluable support and encouragement during the past five years, I would like to acknowledge the following people:

Colonel and Mrs. Norman E. Miner, Jr.
Kathy M. Hughes
Kingston Wm. Heath

INTRODUCTION

THESIS STATEMENT:

The revitalization of the downtown business district through the selective restoration and reinterpretation of the existing fabric.

THESIS PROJECT:

The adaptive reuse of two key buildings, the Cooper Building and the Golden Rule Building, within the downtown business district of Bozeman, Montana. The restoration of these two buildings can then serve as a model for the remainder of the district.

The purpose of this thesis is to explore the advantages and the disadvantages of adaptive reuse of historic buildings and how their reuse can serve as a catalyst for the revitalization of the downtown business district of Bozeman, Montana. The project was developed in response to a wide variety of directions which the downtown businessmen have taken recently in an attempt to compete with the mall for retail business. This thesis proposes a theoretical alternative for revitalization of the downtown which, through research and analysis of test cases funded by the National Trust, has been proven effective.

The project explores, in depth, the utilization of adaptive reuse as a tool for revitalization and as an alternative to demolition and new construction within the existing downtown fabric. Old buildings have generally been looked at as liabilities by businessmen; therefore, the intent of the project is to recognize and accent the positive aspects of old buildings. By pointing out the favorable qualities of old buildings, what was originally thought of as a liability could in actuality be an asset to a business -- hence the title SAVE THE WHALES.

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I. ECONOMIC ADVANTAGES of ADAPTIVE REUSE

Adaptive reuse and rehabilitation has just recently come within the professional scope of the architect. Before the 1970's adaptive reuse of old buildings was rare and the reuse projects which were undertaken dealt primarily with major historic structures, such as Ghiradelli Square in San Francisco which was given a new use in 1963. A change in public and government attitudes towards demolition of old buildings and a restructuring of the tax system[1] during the 1970's[2] brought forth a new interest in adaptive reuse and rehabilitation of old buildings. A survey conducted in 1977 by Progressive Architecture reflects the recent surge in reuse projects; the survey showed, through a selective sampling of architectural firms, that 87.6% of the nations private architectural firms would be involved in remodeling projects during 1977-1978.[3] In addition the sampled firms also indi-

1. Prior to the Tax Reform Act of 1976 the tax system encouraged the demolition of old buildings and the construction of new structures.

2. Time period cited in "Big in the 70's: Recycling and Restoration," AIA Journal (January 1980 pg. 55.

3. David Morton, "Is Preservation Pop?" Progressive Architecture (November, 1977), pg. 51.

cated that over one-third of their total volume (during 1977-1978) would deal with remodeling projects, as compared to only one-fifth in 1975.[4] The shift towards the reuse of old buildings was brought about by many influences, the most tangible of which include -- the economy and the shortage of energy supplies.

Recent changes in the economy, specifically in the form of stagflation[5] and an economic recession, have resulted in higher construction costs for new buildings. Increased construction costs are due to increase in material and labor costs and high rates of interest for construction loans. Shortages in the supply of energy, brought about by the oil embargo of 1973, has increased the cost of manufacturing and transporting building materials, again adding to the cost of construction. A 1976 conference on the economics of preserving old buildings for new uses showed that the cost of rehabilitation generally, "is

4. David Morton, "Is Preservation Pop?" Progressive Architecture (November, 1977), pg. 51.

5. Stagflation is a recent term which refers to high rates of unemployment in conjunction with high inflation.

running a quarter to a third less than the cost of new construction."[6] Since the cost of reusing old buildings is generally less than the cost of new construction, adaptive reuse becomes an economically feasible alternative to new construction.

Another benefit which is inherent in adaptive reuse is labor intensity. A 1977 report by the Office of Archaeology and Historic Preservation states that rehabilitation projects are as high as 75% labor intensive, as compared to 50% for new construction.[7] This implies that in most rehabilitation work a larger proportion of the construction costs is labor cost. With the increased costs of labor, this aspect of adaptive reuse has become less influential in the economic choice of reuse of an old building over new construction. Labor intensity, however, does serve to funnel the costs of construction locally rather than on material, production and transportation costs,

6. Andrea Dean, "Adaptive Use: Economic and Other Advantages," AIA Journal (June 1976) pg. 27.

7. Office of Archaeology and Historic Preservation, U. S. Department of the Interior, "Conservation of the Urban Environment", Washington, D.C., 1977 cited by Thomas Bever, The Economics Benefits of Preservation, May 1980, pg. 1.

which generally originate out of state. Other favorable economic aspects of adaptive reuse projects, as shown by case studies, are shorter construction time and shorter ammortization period on construction loans, both of which constitute substantial savings in costs.[8]

A major factor that has made reuse and rehabilitation projects unpopular is the high risk involved, on the behalf of the contractor, during the construction period. Unanticipated difficulties often arise during construction, such as structural problems and/or damage to existing materials, and may be costly to rectify. As protection from these costs, the contractor adds a high contingency fee, from 15% to 20% to the cost of construction. These contingency fees add considerable costs to the project and decreases the economic benefits of reuse. As architects and contractors become more proficient in the rehabilitation field, these construction problems may be anticipated resulting in

8. Andrea Dean, "Adaptive Use: Economic and Other Advantages," AIA Journal (June 1976) pg. 27.

a lowering of contingency fees. To help alleviate construction difficulties, a careful structural analysis should be undertaken prior to construction.

Adaptive reuse of old buildings also responds to the increased demand for energy conservation. The most obvious is the conservation of existing materials. The reuse of existing materials results in a conservation of energy which would have been expended by the manufacturer to produce and replace the existing materials. A 1968 study determined that rehabilitation consumes 23% less energy than new construction.[9] It is this conservation of energy which is rarely considered in the costs for new construction.

The term energy conservation immediately brings to mind the cost of heating and/or cooling spaces within a building. A recent study has shown that the most energy inefficient buildings were constructed

9. Thomas Bever, The Economic Benefits of Preservation, May 1980, pg. 3.

between 1940 and 1975.[10] This time period reflects the era of the "glass box", which did not concern itself with energy costs. Only recently, with the rapidly increasing costs of energy, has new construction and design concerned itself with energy conservation. The concern for energy conservation, however, is not a new one; 19th and early 20th century architecture responds to energy concerns, due to an increased sensitivity to the environment and the use of natural resources, such as skylights, cross ventilation and large thermal masses, instead of relying upon mechanical means to heat, light and ventilate a space. The most obvious energy saving feature in older buildings is the use of operable windows to provide light and ventilation,[11] instead of using mechanical air conditioning equipment. Operable windows in a building, however, are a main source of air infiltration and heat loss; therefore, it is necessary to adequately weatherstrip the window to seal any leaks.

10. Baird Smith, "Conserving Energy in Historic Buildings", Preservation Brief, pg. 1.

11. Smith, pg. 2.

Exterior awnings and balconies were often incorporated, on the south facing facade, to reduce heat gain from the summer sun. Another inherent feature of most older buildings to control heat loss is the use of masonry walls. The increased thickness of masonry walls, due to their load bearing function, creates a large thermal mass. This thermal mass has been determined to have the advantage of high thermal inertia ("M factor"),[12] which is the ability to sustain the process of heat conductivity over a long period of time. The thermal inertia, "...modifies the thermal resistance (R factor) of the wall by lengthening the time scale of heat transmission."[13] By lengthening the time scale of heat transmission, fluctuations of temperatures in the interior spaces are reduced. The walls which are exposed to solar radiation also have the capability to store energy and to radiate it over a longer period of time.

12. Baird Smith, "Conserving Energy in Historic Buildings", Preservation Brief, pg. 2.

13. Smith, pg. 2.

Heat loss through the roof, however, is one of the major inefficiencies of many old buildings. A reduction of heat loss and correction of other inefficient aspects of old buildings can be rectified through the incorporation of preservation retrofitting. Preservation retrofitting refers to measures which can be undertaken and do not jeopardize the historic character of the building. These measures include: reduction of air infiltration by weatherstripping and caulking of cracks and joints, insulating the attic to reduce heat loss, adding storm windows, insulating the basement and crawl spaces, insulating mechanical pipes and ducts, use of awnings and other shade devices to reduce heat gain, installation of storm doors and entry vestibules, and the insulation of the exterior walls.[14] Preservation retrofitting improves the efficiency of the building and can result in a 20% to 30% reduction in energy consumption.[15]

14. Baird Smith, "Conserving Energy in Historic Buildings", Preservation Brief, pg. 2.

15. Smith, pg. 3.

The National Register of Historic Places, which is a listing of buildings which have met established criteria and are considered historically significant, offer additional economic benefits to help stimulate the adaptive reuse and rehabilitation of historic structures. The benefits available include: 50-50 state matching grants, tax credits and accelerated depreciation of construction costs.[16]

16. Benefits available to structures listed on the National Register will be presented in detail in a later chapter.

2. CULTURAL ADVANTAGES of ADAPTIVE REUSE

There are additional benefits of adaptive reuse other than economic, one of which is the social and cultural advantages of preserving pieces of the past. "Since buildings express the cultures which shaped them, historic preservation activity has necessarily brought to light and fortified the cultural systems of small towns....Historic preservation becomes a mechanism for promoting cultural continuity (from one generation to another)."[17] Adaptive reuse and restoration of old buildings serve to reidentify the character of the existing downtown fabric. Instead of trying to create a new identity and character of a downtown through new construction, restoration and reuse maintains and strengthens existing elements of the downtown. The reidentification of the downtown is accomplished through the highlighting of a building's historical features which have been hidden over time due to "modernization".

17. Carol Galbreath, "Small Town Preservation - A Systematic View", Historic Preservation (April/June 1975) pg. 19.

Adaptive reuse can also serve to restore vitality to the downtown. This is accomplished by restoring the "shell" and at the same time providing a new function for the building, which can make it a viable entity in the downtown community. The creation of new uses for old buildings, which have outlived their original function, saves it from one of two inevitable fates -- demolition or museumization.

3. ALTERNATIVES for

OLD BUILDINGS

> A building (or an ensemble of buildings) stops belonging to the present when it ceases to accomplish the function for which it was designed. To avoid its slipping into the past, where the alternatives will be destruction or museumization, it will be necessary at that point to convert it to a new function.[18]

Demolition is an obvious fate for old buildings which have outlived their use and one which was employed heavily in the 1960's under the federal urban renewal policy ("model city" act), which provided tax incentives for demolition of old buildings. The extent of the demolition in urban areas was so extreme that in 1972 Kenneth Frampton was able to state at a symposium on preservation that, "America,...is well into the destruction of its 19th century heritage."[19] This demolition during the 1960's resulted in a sawtooth effect on urban areas. The buildings which were demolished generally were not replaced by new structures,

18. Pierre Schnieder, "Converting the Past," Architecture Plus (March/April 1974) pg. 66.

19. "Preservation in Context", Progressive Architecture (November 1972) pg. 64.

therefore, leaving gaps in the urban fabric and disrupting the visual continuity of the town.

Museumization, however, is not as obvious a fate as demolition but can be as devastating in its obliteration of the historic past as a continuum. Museumization refers to the "freezing" of a building at a specific time period, and providing the structure with no useful purpose other than as a museum piece facade. Museumization can be a negative aspect of historic preservation -- especially when it is legislated (in the form of local design covenants) and when it involves the demolition of structures past a certain terminus date, as was done in historic Williamsburg. One must not form historical hierarchies; all periods of history can inform us and, therefore, are significant. Museumization provides an image which attracts the tourists; this can be a positive aspect, however the image which is developed is very outward focused

and may alienate the present users (the local residents).

On the other hand, the restoration and reuse of a building expresses a new confidence in the downtown and has the effect of creating a renewed interest in the area. The visual impact brought about by restoration creates a visual interest which is essential in attracting the public. This point was brought out by Giorgio Cavaglieri when he stated, "...as advertising, the restored buildings are certainly equal to neon signs or bronzed plaques."[20] This attraction provided by restoration of old buildings is an important tool for the revitalization and renewed interest in a downtown area. Yet, many many clients miss the point that the visual difference of a building whose forms, colors and materials hail from another age arrest the attention of a passerby and is, therefore, not dependent upon blatent visual eye catchers such as neon. A good local example is the restoration of the AMC/Sullivan Photo building

20. Giorgio Cavaglieri, "Plus Factors of Old Buildings", Economic Benefits of Preserving Old Buildings, Washington, D. C., 1976, pg. 55.

whose restored rythms and features are nearly negated by overkill signage that occupies the street level. Subtle attention getters such as awnings and pedestrian scale signage accomplish the same task as the large neon signs through curiosity and diversity.

4. SMALL TOWNS and

THE MALL

> Certainly, revitalization of business districts is crucial to towns that must offer superior shopping environments in order to compete with with the regional shopping centers.[21]

The 1970 census reveals that for the first time since the turn of the century, population in small towns is growing.[22] This shift in population away from the major urban areas has introduced a new problem to be faced by small towns -- the regional shopping centers (malls). The regional malls have responded to the shift in population growths and are now targeting the small towns instead of the larger cities. The advent of a mall in a small town causes a split in the focus of the town. The central business district (downtown) of small towns has to now compete against the mall for retailing and entertainment. The downtown, however, still maintains its function as the civic center of the community. Many of the civic buildings, such as the courthouse, police station, city offices, fire station and theaters, are located in the

21. Carol Galbreath, "Small Town Preservation - A Systematic View", Historic Preservation (April/June 1975) pg. 17.

22. Galbreath, pg. 12.

downtown areas. In spite of the civic attraction of the downtown, a decline in customer activity is eminate due to the attraction of the mall.

The attraction of the mall is the result of many elements, including: advertising, "acres" of free parking and a climate controlled environment. Of these elements, unification of advertising and retailing practices is the most intangible to the public. These practices include strict regulations and enforcement, through covenants in the leases, of store hours, signage, sales, promotions and advertising. All of the elements combined serves to make the mall a strong competitor with the downtown.

Many of the retailing practices employed by the malls can also be applied to the downtown district. The downtown merchants often point to the availability of parking and the closeness of its proximity as the

major asset of the mall and as a downfall of the downtown. A recent issue of Conserve Neighborhood points out "...that with their (the malls) gargantuan parking lots, the customer often walks the equivalent of several city clocks to get to a shop."[23] The same issue also states that, "...due to the malls image, shoppers feel that they have reached their destination once they reached that large lot."[24] The strong image which is generated by malls can also be incorporated by the downtown through the unification of retailing practices and signage by the individual stores. Often the downtown shopper is bombarded with an assortment of signs and buildings which are competing for superiority of visual impact. The competition between downtown merchants for visual superiority results in very non-unified image which can alienate the shopper.

Unification presents itself as the major element which needs to be

23. Conserve Neighborhoods, Summer 1979, pg. 56.

24. Conserve Neighborhoods, pg. 56.

adopted by the downtown. The downtown can not easily, without major alteration, compete with the malls in terms of providing a climate controlled environment. However, the downtown can adopt the unification practices employed by the mall, including: regulation of signage, store hours, advertising and promotions. The downtown merchants do not have the same power of enforcement, through covenants, but with cooperation the downtown can form a unified front to compete with the mall.

5. DOWNTOWN

The downtown also has many features which can be expressed to provide the downtown a more pleasant environment. One of these features which can be expressed is the historic character of the downtown which is still maintained, though muddled, in many small towns.

"The small society which has its roots in pre-industrial civilization (1800's), has in many cases survived the abuses of industrialism and seems to be entering the post industrial era along with mass society."[25] This survival is evident by the endurance and large numbers of old buildings (19th century and early 20th century) still remaining in the downtown. In keeping pace with the times the downtown of many small towns underwent a series of "modernizing" attempts to deny its history. One of these attempts to "modernize" has been coined by Ada Louise Huxtable as the "Kawneer syndrome."[26] This term refers to the extensive use of aluminum, in the 1950's and 1960's, to hide historic

25. Carol Galbreath, "Small Town Preservation - A Systematic View", Historic Preservation (April/June 1975) pg. 15.

26. Ada Louise Huxtable, "The Fall and Rise of Main Street", New York Times Magazine, May 30, 1976, pg. 13.

features of a building and give the structure a new image -- "modern". Many materials other than aluminum, such as wood and concrete block, were also used to camouflage the old buildings which were to good to tear down. Fortunately, these attempts to "modernize" old buildings were for the most part superficial and the camouflaged buildings are being rediscovered. The rediscovery of historic buildings has served to slowly reidentify the image and character which has been developing since the inception of the business district. The renewed sense of historical character has been used in various ways by small towns to attract the potential customer.

Museumization, is a solution which has been utilized by many towns, including: Williamsburg, Virginia; Jacksonville, Oregon and Virginia City, Montana. As was previously defined, museumization refers to the freezing of a building, or town, at a specific time period. This

solution does serve to unify the town as a single element but orients the town towards tourists and not to the local users. A second tourist oriented solution adopted by small towns which closely parallels museumization is the creation of a new identity for the town. The downtown takes on a character and image which did not historically exist. This solution also presents a unified front and is effective in attracting the tourist. A third scheme which is being employed by many small towns, especially those in warmer climates, is the creation of a downtown mall. The downtown mall is created by closing of streets to vehicular traffic, thus, setting aside entire blocks for pedestrian usage. The downtown mall is much more inwardly focused thus serving the needs of the local residents as well as the tourists. A final solution for small towns is to allow the historic buildings to function within the existing framework of the downtown. The downtown continues

to fulfill its original role as civic and business center. Restored buildings are used to reidentify the character which is lost through "modernization" and extensive use of signage. Those buildings which are vacant or threatened by demolition can be given new uses to maintain their vitality in the downtown.

6. DOWNTOWN BOZEMAN

The downtown district of Bozeman, Montana, which extends linearly along Main Street is defined to the west by Rosary Church and by the Bozeman Hotel (fig. 1.). The downtown district in the late 1860's and 1870's as a response to provide services required by the farming and mining operations in the Gallatin Valley. The major core of the city developed between Black Avenue and Bozeman Avenue. The businesses were oriented towards providing agricultural and mining implements, clothing and dry goods, and banking facilities. As the Gallatin Valley prospered, so did the down business district, and by 1920 the downtown district grew to approximately the same size as it is today. Few buildings have been constructed in the downtown district since the 1920's. The majority of the construction which has taken place in the downtown has been the alteration and "modernization" of the existing buildings.

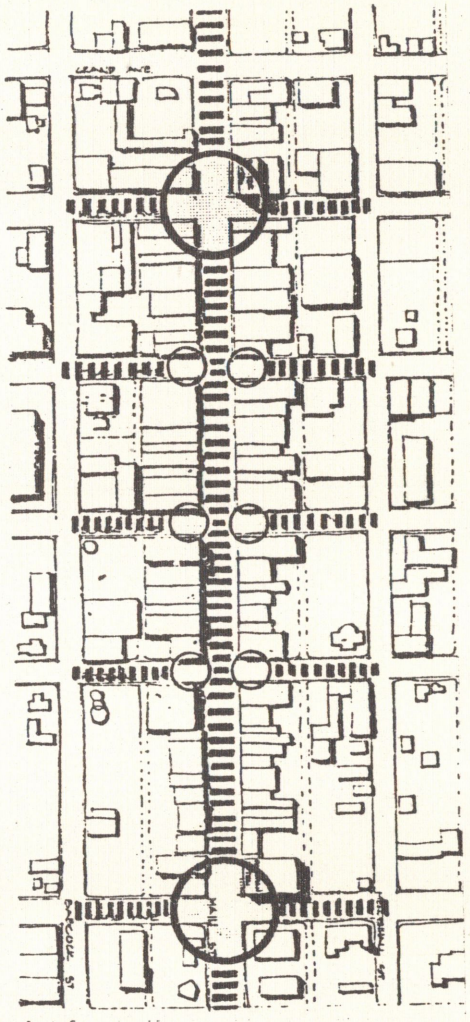


Fig. 1

The proof that many of the historical buildings are still present is obvious upon inspection of the upper levels of the downtown buildings. Often the alterations of the buildings took place only at the street level and the second level was left intact. It is the highlighting of the existing features on the second level and the reidentification of the historical feature on the first level which can serve as a catalyst to reintroduce and strengthen the historical character of the downtown.

Bozeman, like many small towns is currently experiencing the effects caused by the influx of the regional shopping mall -- in this case, two new malls. The two malls, Main Mall and University Square, provide the combined potential for 380,000 square feet of retail space; this figure is equivalent to 75% of the retail space in the downtown district.[27] The relatively instantaneous creation of additional retail space has caused a marked decline

27. Statistics taken from a lecture delivered by Maxine Johnson, economist at the University of Montana, on the Bozeman area economy, October 29, 1981.

in downtown customer activity and has prompted the downtown merchants to re-examine the downtown district for means of attracting the customer, who now has the choice of two major shopping areas -- the downtown and the malls. The Downtown Development Association, a group of concerned downtown merchants, is presently considering various projects for upgrading and revitalizing the downtown district to attract the customer, but to date these efforts do not reflect a unified front. Upgrading and revitalizing efforts range from demolition (Rosary School and Ben's Conoco), to facelifts and repainting (McDonalds and Mr. Mack's), to full scale restorations (AMC/Sullivan Photo).

7. METHODOLOGY

A "model" or systematic approach will be employed to reidentify the character of the downtown. This approach does not require that every building be restored, instead, buildings owned by key downtown merchants and those with high visual impact are targeted for restoration. The approach is recommended by the National Trust for Historic Preservation, a private non-profit organization, and has been proven effective in their Main Street Project.[28] The Main Street Project was implemented by the National Trust five years ago and involved using three small towns; Hot Springs, South Dakota; Galesburg, Illinois; and Madison Indiana; as test cases for revitalization of the downtown. The National Trust sent advisors to each town for a period of five years to direct the revitalization project. The project coordinators realized that the downtown of a town could not be revitalized overnight and a philosophy of incremental, but perceptible, change was adopted as the

28. To obtain additional information about the Main Street Project write to the National Trust for Historic Preservation, Washington, D.C.

means of achieving the goal of revitalization. The five year test period ended this past year, but the results have not been made public yet. The project was, however, enough of a success that it has been expanded to thirty pilot towns which will be studied over the next five years.

For the purpose of this thesis, a central core consisting of a city block and one-half will be used as the model for the downtown; therefore, reidentification of the entire business district is not the end goal of this thesis. Located within this core are two buildings which will be dealt with -- the Cooper Building (presently occupied by the Wine Merchant, a dentist, and Action Realty) and the Golden Rule Building (presently the Stylon).

The two buildings maintain many of their historical elements, especially on the second level; however, the integrity of the historical

features has been compromised on the first level due to modernization of the facades. The modernization of primarily the first level places the building in what could be termed a "transitional phase", and does not have to undergo much restoration to reidentify the buildings historical character.

Adaptive reuse and restoration then, can serve to revitalize a downtown area by establishing a visible example of concern for the traditional fabric of the original business district; however, these selectively restored structures should be considered as a part of an overall scheme (master plan) for revitalization. Historic preservation can best be utilized when incorporated within a framework of a long range planning goals. These planning goals include: zoning, architectural planning, historic preservation planning (downtown historical survey), traffic and parking plans, and financial planning for disburse-

ment of potential restoration funding (H.U.D. Block grants and Small Business loans). While the establishment of these goals is not within the scope of this thesis, planning concerns will be addressed in the form of analyzing the "context" of the proposed restored buildings. Some key concerns include: image, signage, landscaping and circulation patterns.

8. TAX INCENTIVES for HISTORIC BUILDINGS

In conjunction with the economic benefits available through adaptive reuse, the federal government has recently taken steps to promote the reuse and restoration of old buildings. These steps take the form of a series of tax reform acts which were implemented in 1976. Prior to 1976, the tax laws not only provided a dissentive for adaptive reuse but made it profitable to demolish old buildings.

The first of these tax reform acts is the Tax Reform Act of 1976. "Section 2124 of the Tax Reform Act...added new provisions to the Internal Revenue Code that provided major tax incentives for rehabilitation by owners, or lessees, of commercial or other income producing historic structures and tax penalties for those who demolish such structures and replace them with new buildings or substantially alter them."[29]

29. Gregory Andrews, Sally Oldham and Ward Jandl, Tax Incentives for Historic Preservation. Washington, D.C., pg. 17.

The tax incentives available under the Tax Reform Act provide the owner of qualified lessee[30] the choice of two alternatives -- five year ammortization or accelerated depreciation.

Five year ammortization, "...allows an owner or qualified lessee of a certified historic structure to deduct for federal income tax purposes over a 60 month (5 year) period the cost of certified rehabilitation."[31] Allowable expenditures which may be deducted include: any rehabilitation expenses attributed to construction incurred within the framework of the exterior walls, architectural and engineering fees, real estate commissions, insurance premiums, developers fees and other construction related fees which are necessary to upgrade the structure to meet building codes.[32]

The other option available under this act is accelerated deprecia-

30. A qualified lessee must hold a 30 year lease.

31. Gregory Andrews, Sally Oldham and Ward Jandl, Tax Incentives for Historic Preservation. Washington, D.C., page 18.

32. Andrews, Oldham and Janle, pg. 19.

tion. Prior to 1976 only new construction could take advantage of accelerated depreciation; rehabilitation projects, prior to 1976, could only depreciate on a straight line basis. The Tax Reform Act of 1976 allows the owner or lessee of a historic structure to claim a 150% declining balance accelerated depreciation for commercial or income producing property.[33] "Deferral value" and "rate conversion" are the two major benefits which accompany accelerated depreciation.

Deferral value refers to the ability to depreciate the value of the property more quickly than is available on a straight line basis, thus saving taxes "today" rather than saving taxes in the future. Rate conversion applies to those owners or lessees who are in high tax brackets. Rate conversion allows the owner or lessee to deduct the depreciation of the property against any ordinary income. These two elements[34] make accelerated depreciation attractive to those owners who

33. The depreciation rate is 200% for residential rental property.

34. For more detailed information abour rate conversion and deferral value, refer to: Andrews, Oldham and Jandl, pg. 16.

are in high tax brackets. As pointed out at the 1979 tax incentive workshop in Denver, both five year ammortization and accelerated depreciation are long term benefits and usually do not attract developers, whose interests are usually short term.

The Tax Reform Act of 1976 also includes a tax penalty for those owners who demolish a designated historic structure. The provision does not allow the owner to deduct the cost of demolition; prior to the act, the cost of demolition could be depreciated at an accelerated rate along with the new structure. This provision increase the actual cost of demolition and is an unpopular provision of the act. In order for an owner to not be penalized for demolition of a historic structure, the building must be decertified by the Secretary of the Interior. An owner, in spite of the provision, may still elect to demolish a historic building and apply for decertification retroactively. If a historic

structure is demolished and is not decertified, the new building which is constructed in its place may only be depreciated on a straight line basis and not by the more favorable accelerated basis.

In order to receive the benefits available under the Tax Reform Act of 1976 the building must be listed in the National Register of Historic Places. The process involved for listing in the National Register involves the submission of an individual, district or thematic nomination to a local review board or the State Historic Preservation Officer, (S.H.P.O.) for approval. After approval of the nomination on a local and state basis the application is forwarded to the Secretary of the Interior for final approval. The nomination is judged on four established criteria: A) association with events which have made significant contributions to the broad patterns of our history, B) association with lives of persons significant in our past, C) embody distinctive charac-

teristics of a type, period or method of construction, D) have yielded or are likely to yield information important in prehistory or history. If any of the criteria is met, the building is listed in the National Register of Historic Places and can make use of the Tax Reform benefits or other additional benefits available through the S.H.P.O.[35]

Another requirement that must be met before any tax benefits are utilized is the "certification" of the rehabilitation by the Secretary of the Interior. Certification of a rehabilitated structure requires that the standards set by the Secretary of the Interior are followed. The standards are gneral guidelines which insure that the rehabilitation work is historically correct and does not compromise the integrity of the building. The procedure for attaining certification requires that a description of the proposed alterations, and its impact, documented by plans, photos and sketches, be sent to the Secretary of the Interior

35. The benefits available from the S.H.P.O. will be discussed later in this chapter.

for review and comment. The Secretary of the Interior will either certify the rehabilitation or make suggestions and alterations which must be followed in order to obtain certification.

The process of certification is usually initiated before the rehabilitation work is begun to insure that the work is certified and the tax benefits will be received. An owner or lessee may, however, apply retroactively[36] for certification and the tax benefits. Applying retroactively is not recommended since the work may not be certified and the owner will not be able to claim the tax benefits until the work is rectified. For example, according to one of the Secretary of the Interior's Standards, work which does not conform to the historical character of the building must be "reversable". Reversability refers to the ability to remove the alteration in the future without impairing the essential form and integrity of the structure.

36. Certification may be given to work that is already completed and the tax benefits may be taken retroactively if certification is obtained.

In addition to the tax benefits, state preservation matching grants are also available to those buildings listed in the National Register. The grants available from the S.H.P.O. include "development" grants and "research" grants. Development grants apply to work related to the stabilization and upgrade of the structure, such as cleaning or replacing bricks and mortar. Research grants are applicable for surveys (planning and historic), architectural plans and specifications. These grants come in the form of up to 50-50 matching grants. This means that the grant will match a proportion of money, or in the case of "soft" match, professional labor, put up by an owner. If grant money is utilized, stringent regulations, in the form of protective covenants, are applied to insure that the historical character is maintained for a specified period of time. If no tax incentives or grants are taken and the property is not federally assisted or licensed (e.g. banks) then the

owner of a National Register property may alter or destroy it without penalty, except the demolition penalty as per the 1976 Tax Reform Act.

In addition to the Tax Reform Act and S.H.P.O. grants, the Tax Revenue Act of 1978 added one more benefit to help promote preservation and reuse of old buildings. While this President Carter bill was directed towards urban revitalization, rather than exclusively being "historic" preservation oriented, older commercial structures do substantially benefit. The Revenue Act allows for a 10% tax credit for income producing structures which are 20 years or older. The structures must maintain at least 75% of their existing exterior walls as exterior walls after the rehabilitation.

Unlike the previous benefits, the building does not have to be listed in the National Register of Historic Places, nor does the rehabilitation have to be certified in order to claim the 10% tax credit.

The tax credit may be taken in conjunction with the accelerated depreciation incentive available to designated historic structures; however, the tax credit may not be taken along with the five year ammortization benefit.

The incentives provided under the Tax Reform Act of 1976, the Revenue Act of 1978 and S.H.P.O. preservation grants will not along put an end to the demolition of historic structues. The tax incentives and grants when used in conjunction with the inherent economic benefits of reuse do place adaptive reuse on a competitive, if not more favorable basis with new construction.

9. BUILDING CODES

Historic Buildings

Repairs, alterations and additions necessary for the preservation, restoration, rehabilitation or continued use of a building or structure may be made without conformance to all the requirements of this code when authorized by the building official provided:

1. The building or structure has been designated by official action of the legally constituted authority of this jurisdiction as having special historical or architectural significance.
2. Any unsafe conditions as described in this code are corrected.
3. The restored building or structure will be no more hazardous based on life safety, fire safety and sanitation than the existing building.

B-2 OCCUPANCY - OFFICES

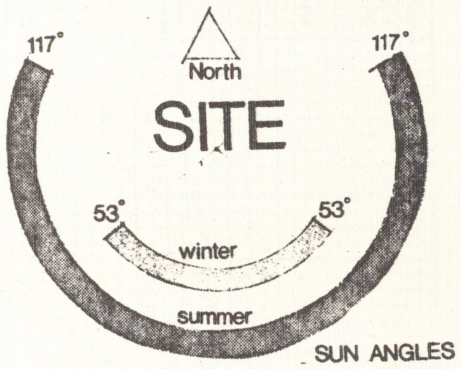
1. One hour fire separation between floor levels.
2. At least one water closet -- may be located in adjacent building.
3. Maximum occupancy of 50 people.
4. Two exits required if occupancy exceeds 30 people.
5. If two exits are required they must be located not less than one-half the length of the longest diagonal from each other.

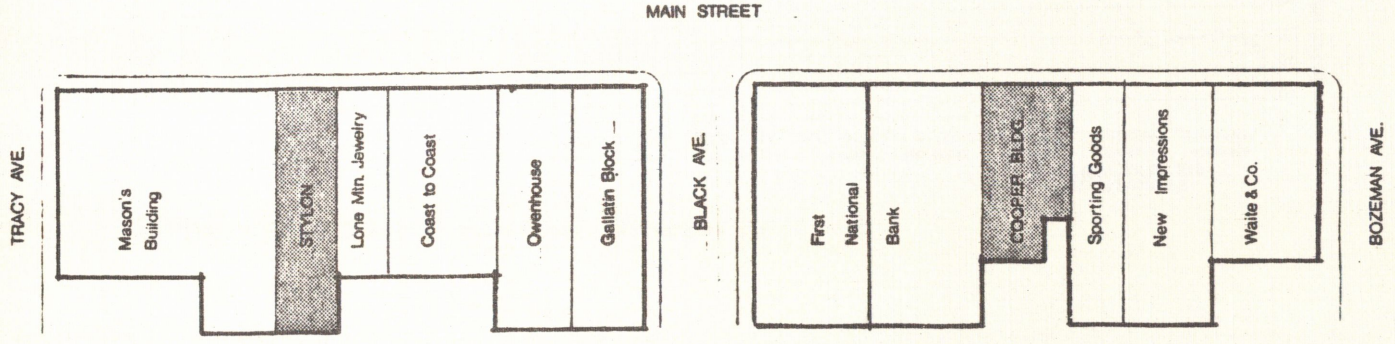
R-3 OCCUPANCY - APARTMENTS

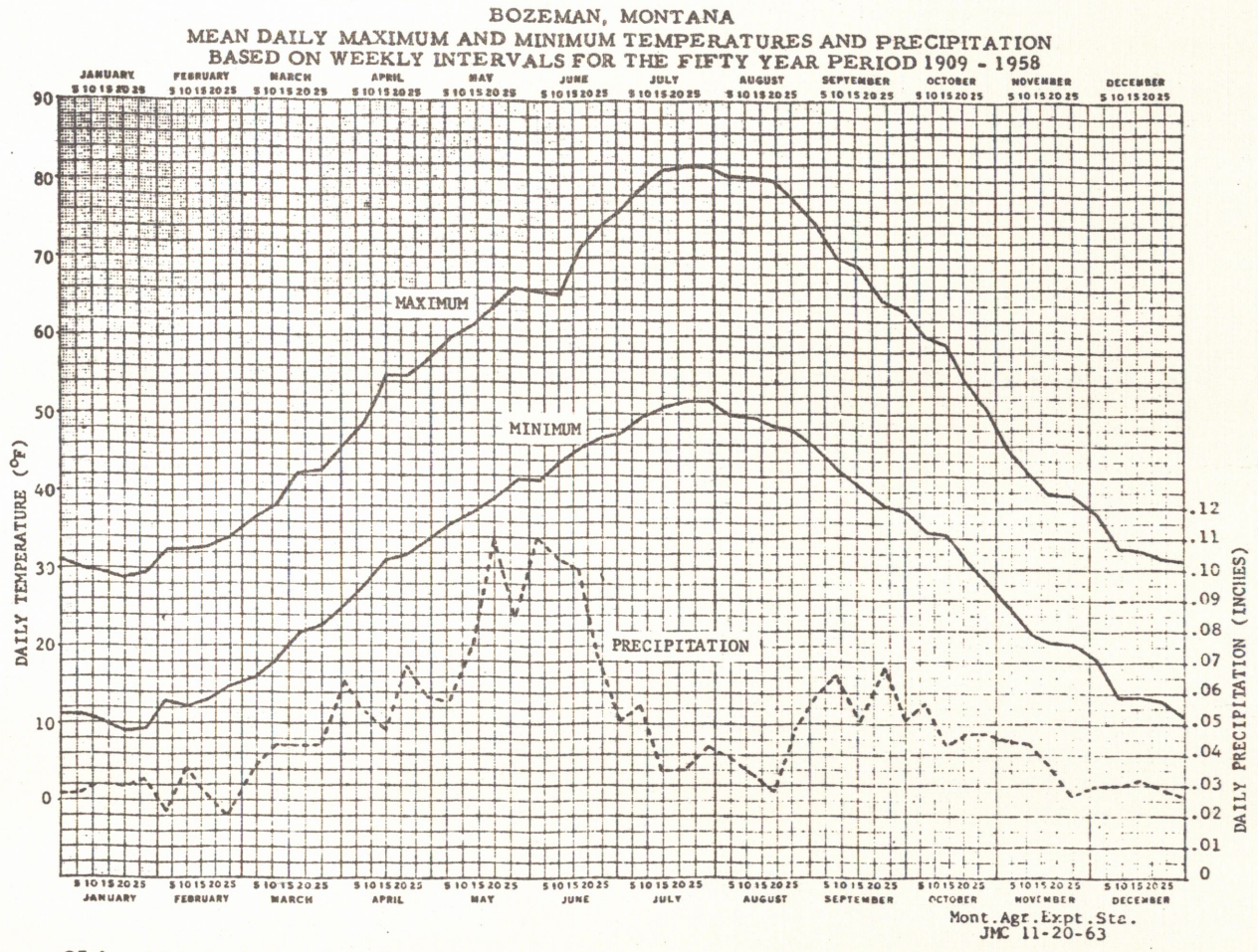
1. Every sleeping room located below the fourth floor shall have an operable window.
2. All habitable rooms shall have natural light - minimum of 10 sq. ft. of window.
3. Shall maintain a minimum ceiling height of 7'-6".
4. Shall have one room of not less than 150 sq. ft. of floor area.
5. No habitable room shall be less than 7' in any dimension.
6. Exit stairs shall have: minimum run of 9"; maximum rise of 8" and be a minimum of 30" wide.

IO. SITE

The site of this thesis in the downtown business district of Bozeman, Montana -- specificall the Cooper Building and the Golden Rule Building (Stylon), indicated by the shaded areas in the map below.







Climatical data for Bozeman, Montana.

11. COOPER BUILDING

The Cooper Building, presently occupied by the Wine Merchant, a dentist and Action Realty, is located at 122 East Main Street. The building is adjoined on the west by First National Bank of Bozeman and by a sporting goods store to the east. The building is two stories high with retail on the ground level and apartments above.

The Cooper Building was built in 1872 by five Bozeman merchants: Col. Ford (Meat Market), Walter Cooper (Armory and Gun Manufacturing), L. M. Black (Merchantile), W. W. Morris (Drugstore) and W. L. Perkins (Family Market). The building was designed by an architect named Allen from St. Joseph, Missouri. The masonry used in the building was produced by W. H. Tracy, who had purchased a brick making machine in 1872. The building is thought to be the third masonry commercial structure built in Bozeman and is the oldest remaining commercial structure in Bozeman.

The building has undergone several alterations, mainly on the ground level, over the past 108 years. The original masonry arcade on the pedestrian level was removed between 1905 and 1910 and was replaced by a modern plate glass storefront. Between 1935 and 1940 the central store, Roecher Drug, underwent further "modernization" of the facade. A "modern" front, of black and cream colored tile, was added and is possibly attributed to Fred Willson, a prominent local architect. In 1972 the two western stores were demolished by First National Bank to provide for expansion of their bank lobby. The demolition of the two stores also ruined the cornice which was removed from the entire building and replaced with new brick.

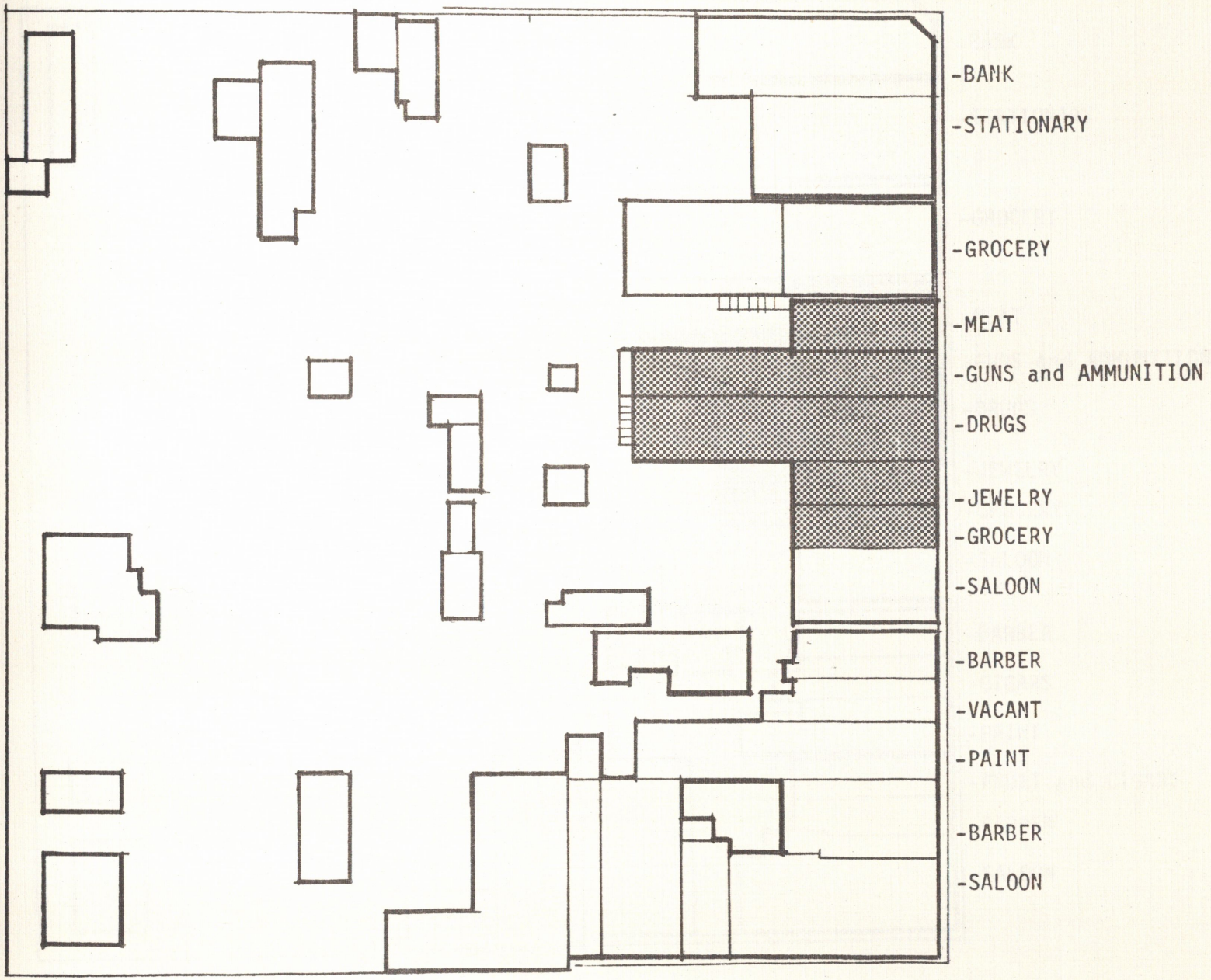
The building is presently being considered for demolition by First National Bank to accommodate further expansion. The thesis project will investigate the feasibility of adaptively reusing the main level of the

building to accommodate the future expansion. A redesign of the upper level apartments will also be incorporated with the proposal.

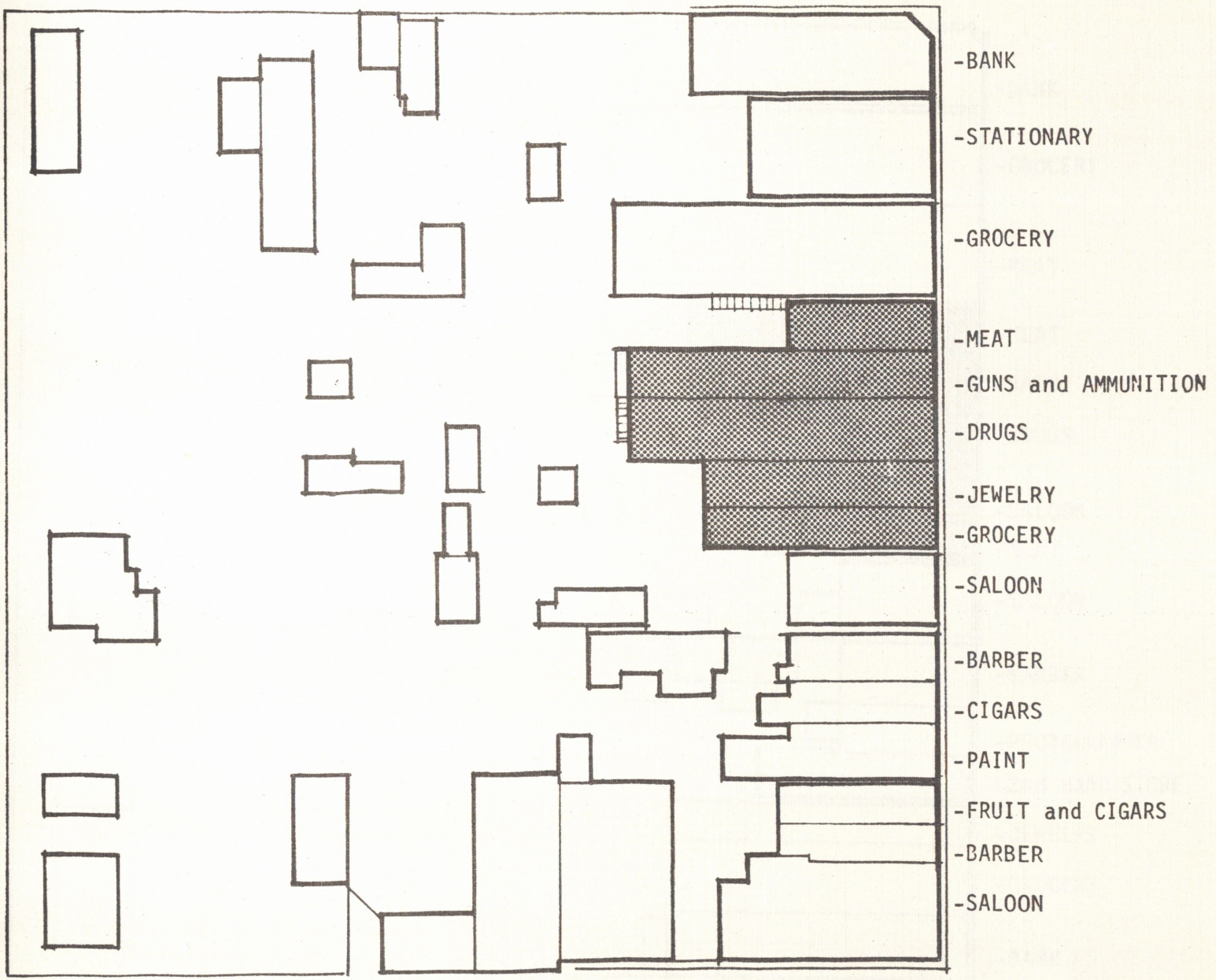
SANBORN MAPS


-BANK
-STATIONARY
-GROCERY
-VACANT
-GUNS and AMMUNITION
-DRUGS
-JEWELRY
-CIGARS
-SALOON
-BARBER
-JEWELRY
-PAINT
-FRUIT and CIGARS
-JEWELRY
-SALOON

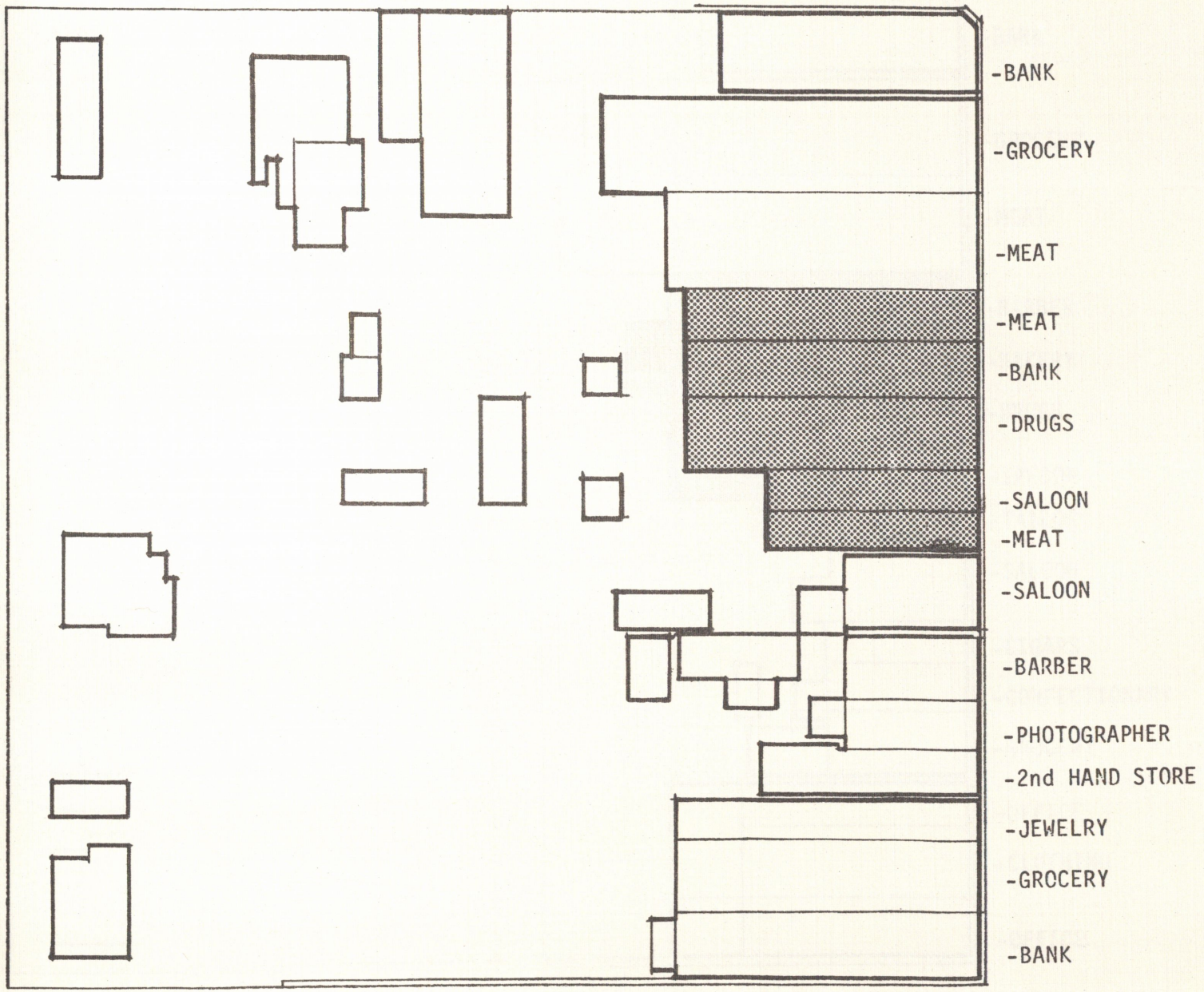
1884


-BANK
-STATIONARY
-GROCERY
-MEAT
-GUNS and AMMUNITION
-DRUGS
-JEWELRY
-GROCERY
-SALOON
-BARBER
-VACANT
-PAINT
-BARBER
-SALOON

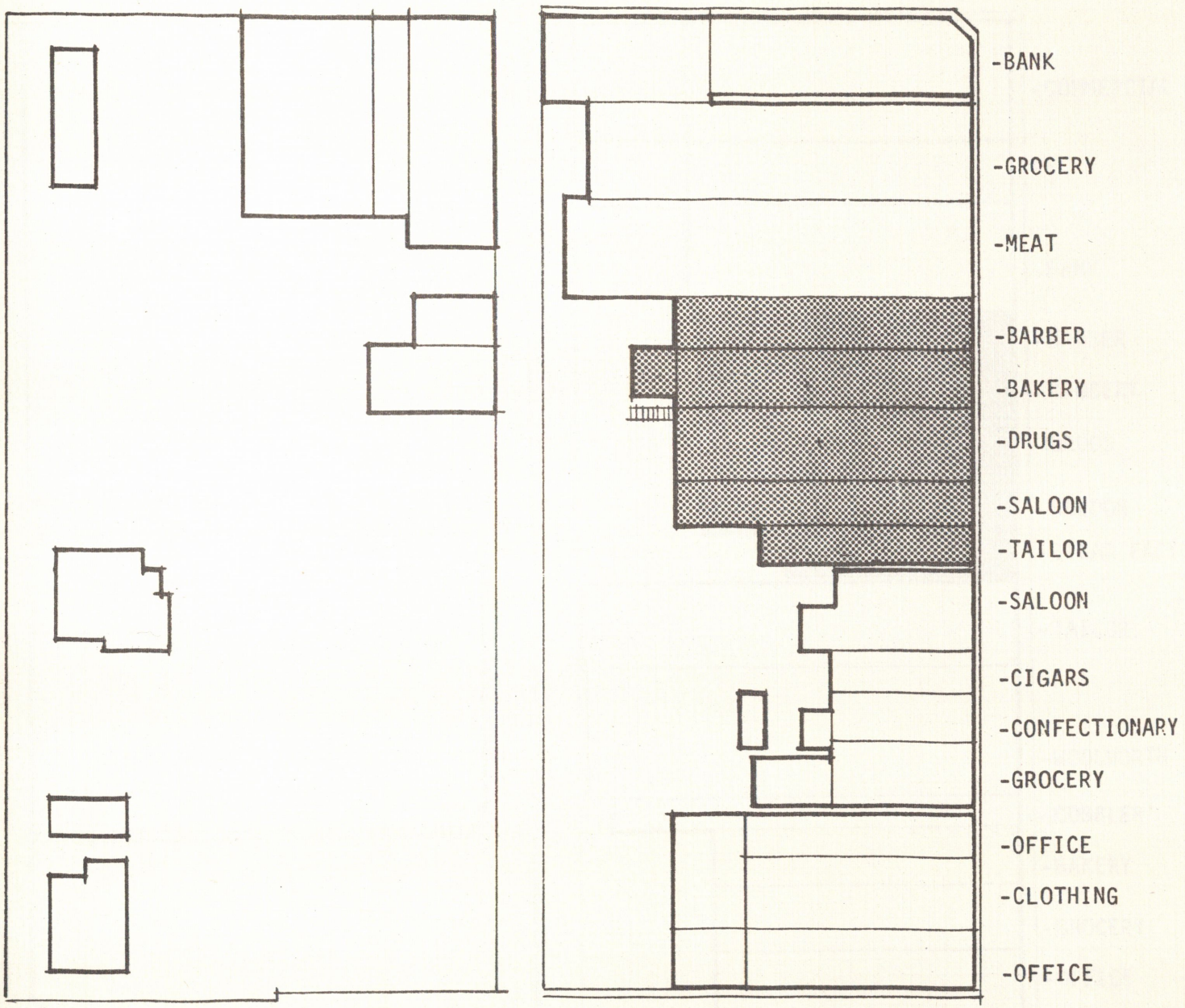
1889


-BANK
-STATIONARY
-GROCERY
-MEAT
-GUNS and AMMUNITION
-DRUGS
-JEWELRY
-GROCERY
-SALOON
-BARBER
-CIGARS
-PAINT
-FRUIT and CIGARS
-BARBER
-SALOON

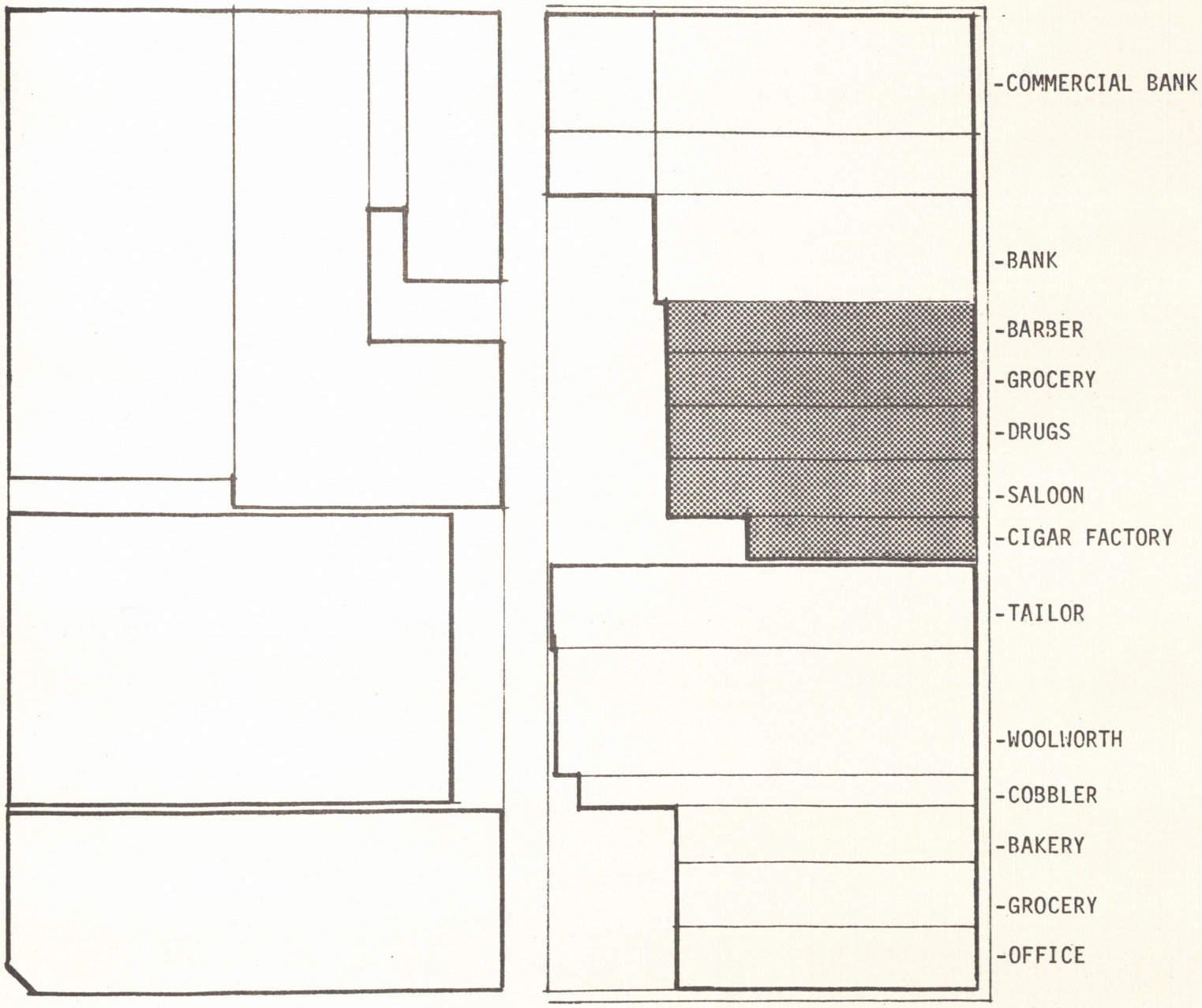
1890


-BANK
-GROCERY
-MEAT
-MEAT
-BANK
-DRUGS
-SALOON
-MEAT
-SALOON
-BARBER
-PHOTOGRAPHER
-2nd HAND STORE
-JEWELRY
-GROCERY
-BANK

1904


-BANK
-GROCERY
-MEAT
-BARBER
-BAKERY
-DRUGS
-SALOON
-TAILOR
-SALOON
-CIGARS
-CONFECTIONARY
-GROCERY
-OFFICE
-CLOTHING
-OFFICE

1912

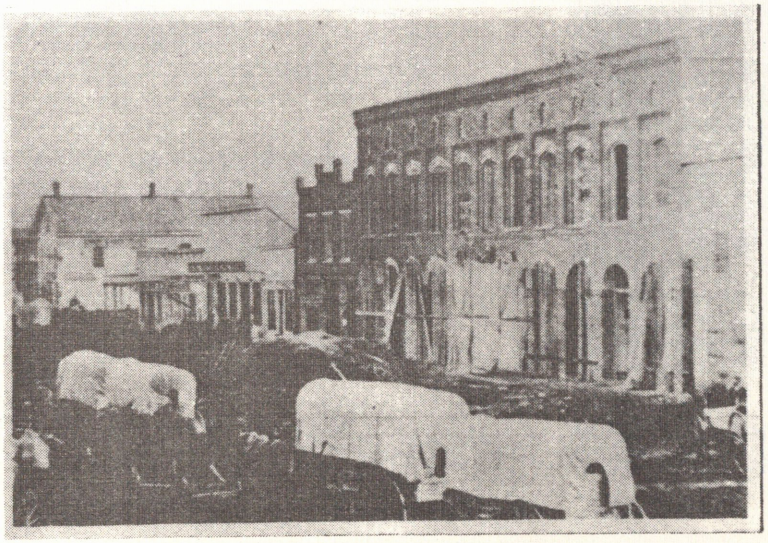

-COMMERCIAL BANK
-BANK
-BARBER
-GROCERY
-DRUGS
-SALOON
-CIGAR FACTORY
-TAILOR
-WOOLWORTH
-COBBLER
-BAKERY
-GROCERY
-OFFICE

1927

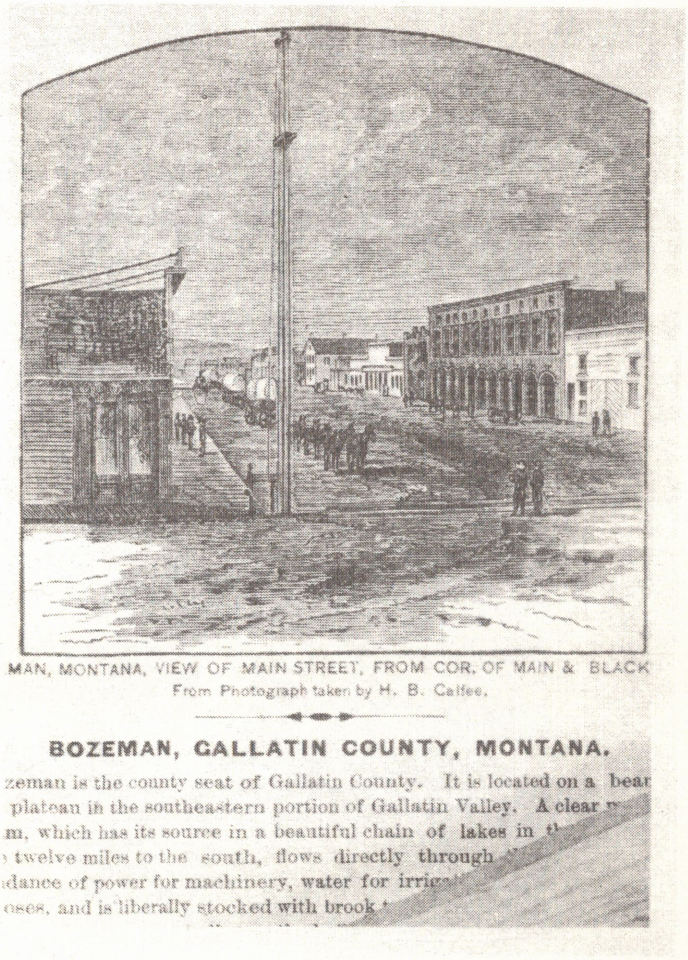
PHOTOGRAPHS



Cooper Building (right) 1981



Cooper Building under construction 1872
(Photo courtesy of Museum of the Rockies)

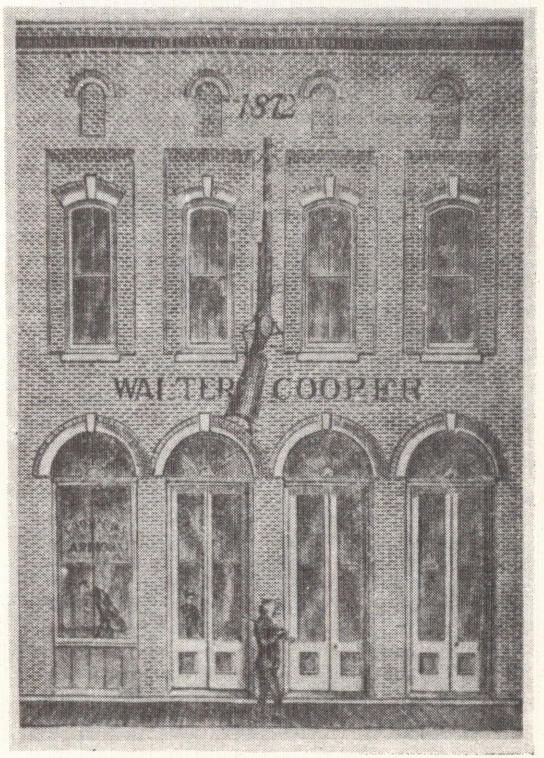


MAN, MONTANA, VIEW OF MAIN STREET, FROM COR. OF MAIN & BLACK
From Photograph taken by H. B. Calfee.

BOZEMAN, GALLATIN COUNTY, MONTANA.

zeman is the county seat of Gallatin County. It is located on a bear
plateau in the southeastern portion of Gallatin Valley. A clear
m, which has its source in a beautiful chain of lakes in
twelve miles to the south, flows directly through
dance of power for machinery, water for irrig
oses, and is liberally stocked with brook

Wood engraving of Cooper Building 1872
(Photo courtesy of Montana Historical Society)



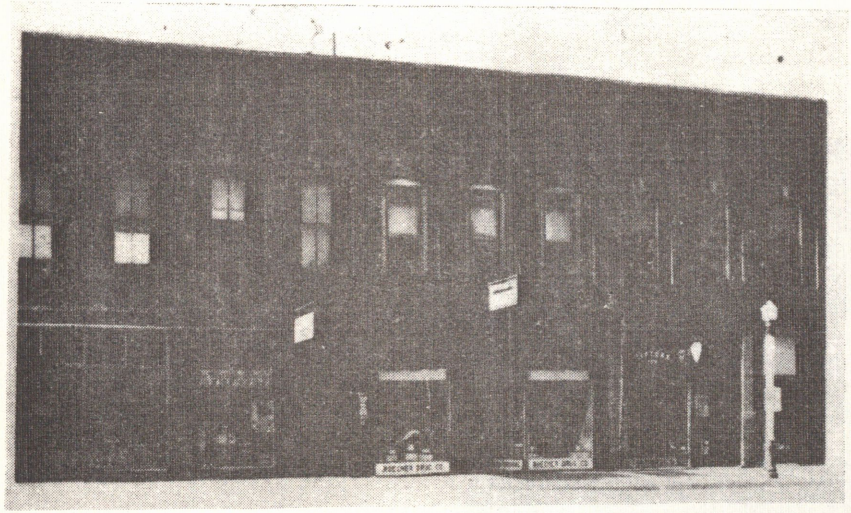
Walter Cooper Armory 1872
(Photo courtesy of Museum of the Rockies)



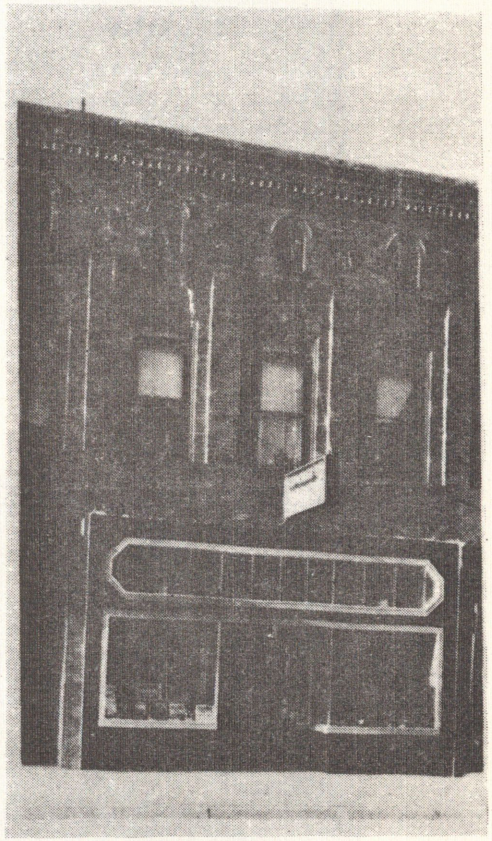
Cooper Building - Morris Drug 1890
(Photo courtesy of Museum of the Rockies)



Cooper Building 1930's
note the removal of the arches
(Photo courtesy of Museum of the Rockies)



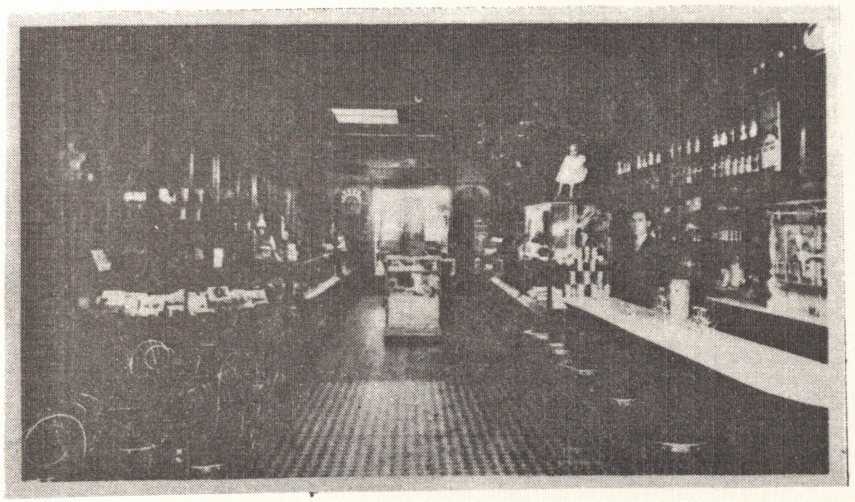
Cooper Building early 1930's
(Photo courtesy of Museum of the Rockies)



Cooper Building late 1930's
note the remodeling of the storefront
(Photo courtesy of the museum of the Rockies)

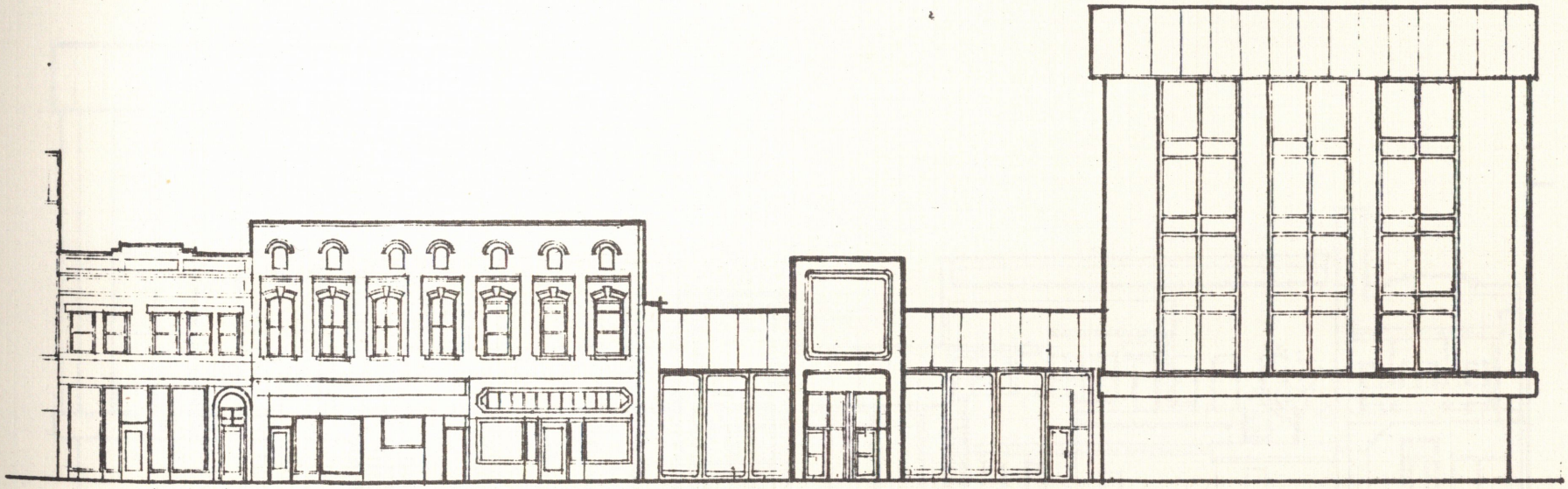


Interior of Cooper Building 1899
(Photo courtesy of Museum of the Rockies)



Interior of Cooper Building 1912
note the absence of the arches
(Photo courtesy of Museum of the Rockies)

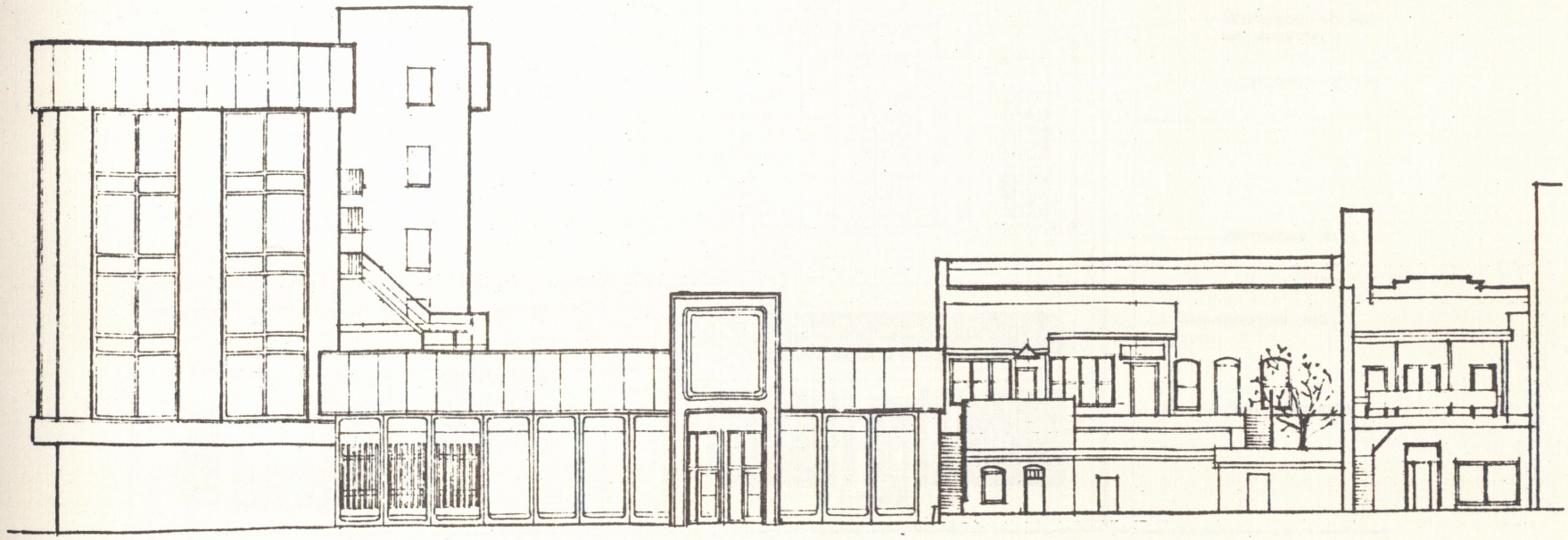
ANALYSIS OF EXISTING BUILDING



Cooper Building

1st National Bank

NORTH



1st National Bank

Cooper Building

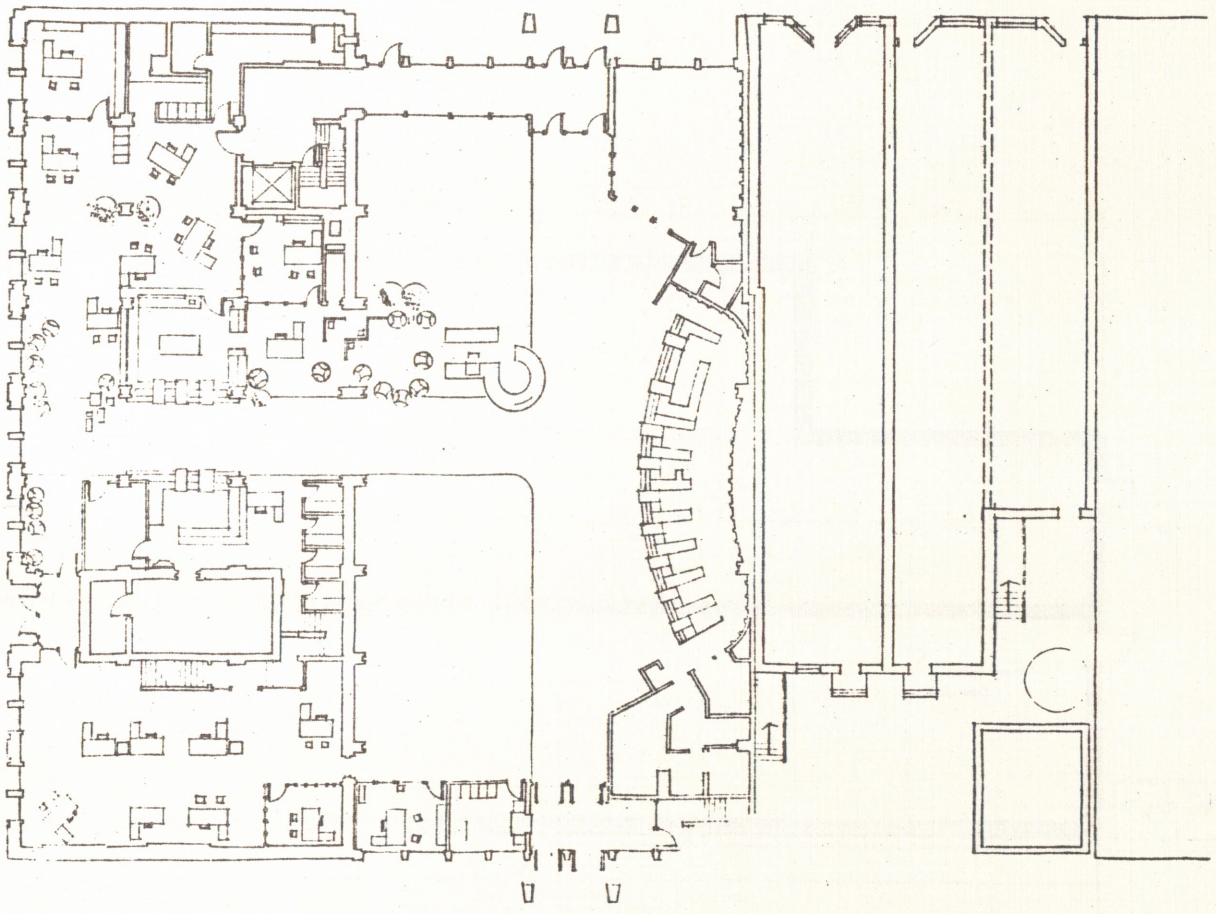
SOUTH


NEW MASONRY CORNICE
ARCHED BLIND WINDOWS
SEGMENTAL ARCHES
with KEYSTONES
RECESSED WINDOWS
SANDSTONE SILLS
BACKLIGHTING
DISPLAY WINDOW
RECESSED ENTRY DOORS

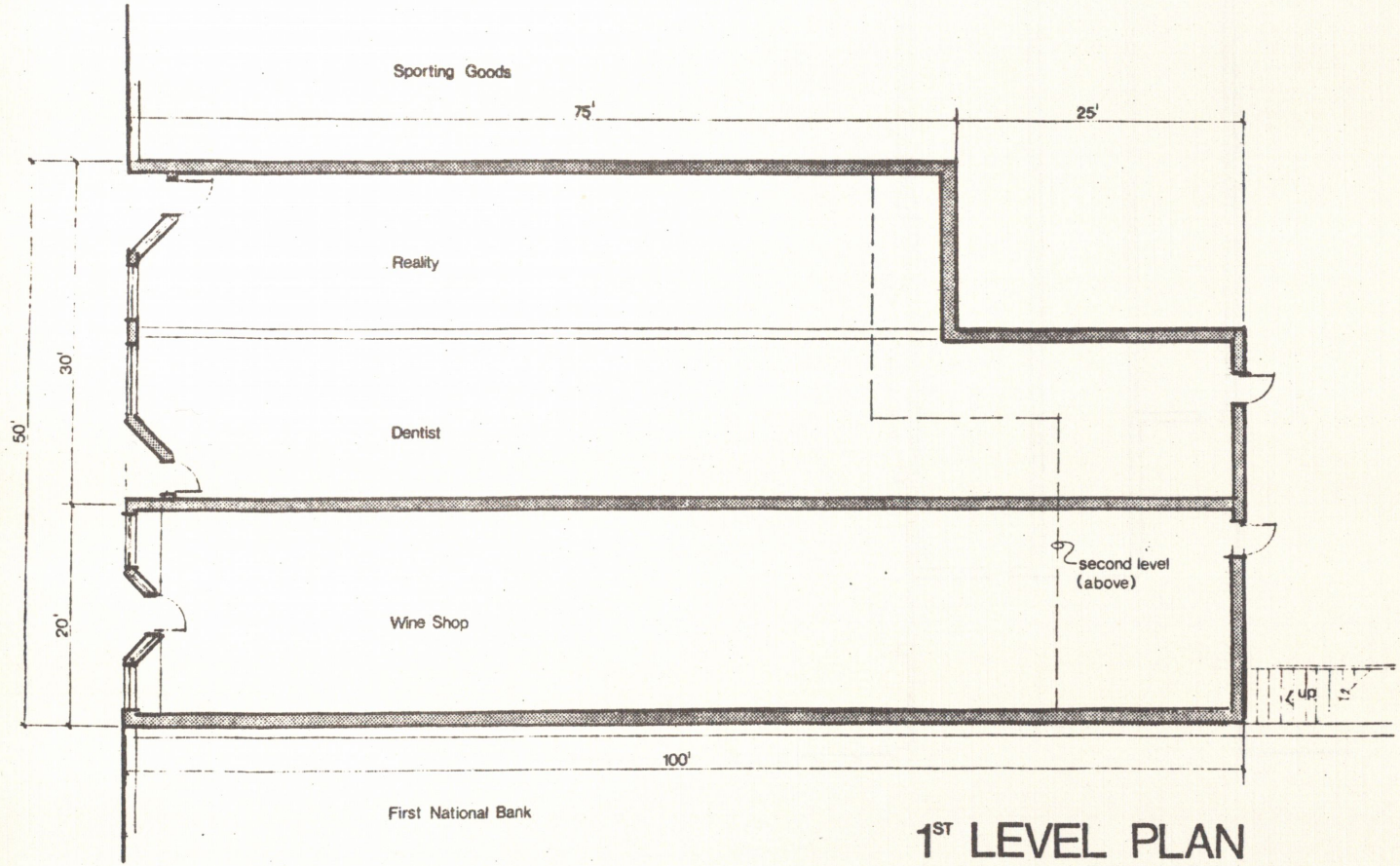
FEATURES

1st National Bank

Cooper Building



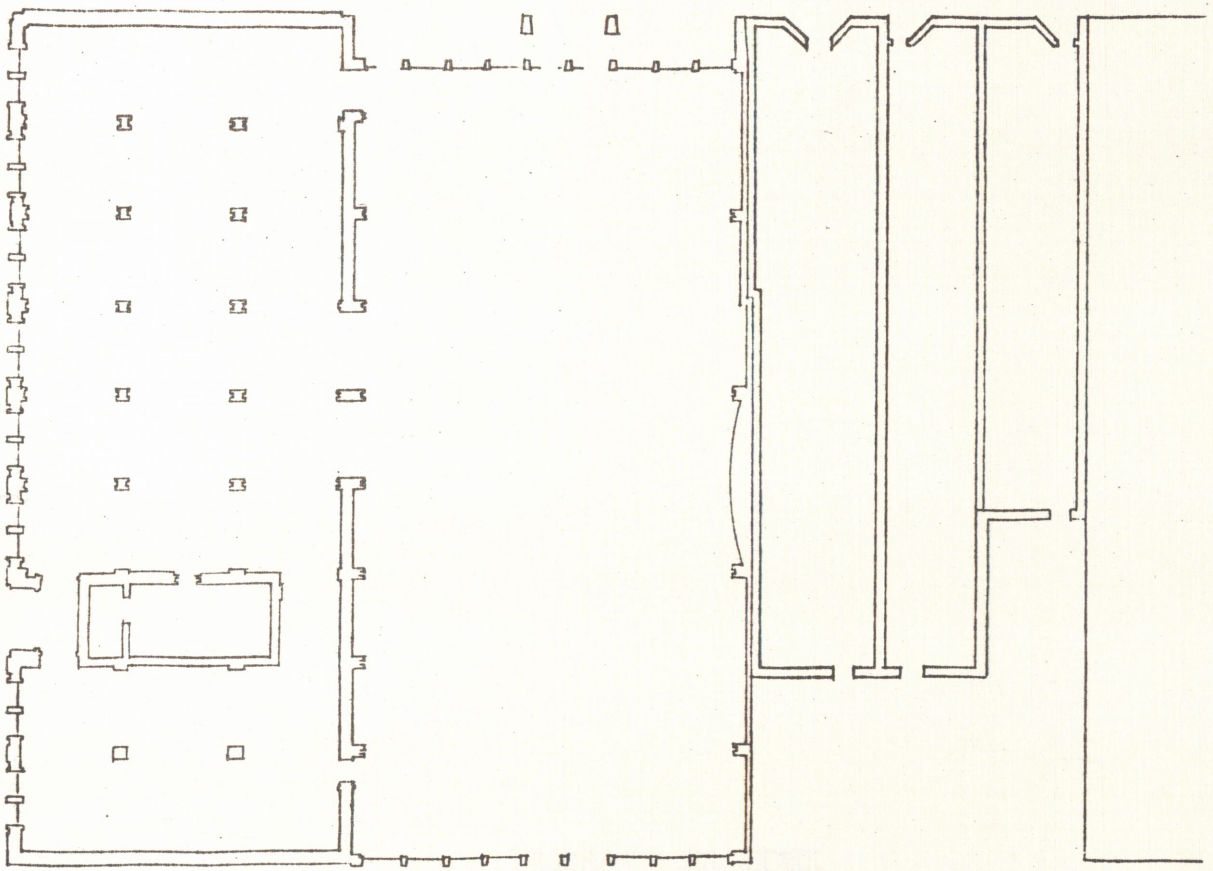
PLAN



1ST LEVEL PLAN

COOPER BUILDING

North



STRUCTURE

PROGRAM - 1st LEVEL

PRESENT REQUIREMENTS

DEPARTMENT	SQUARE FEET	
1. Time Pay		
a. Work Area	655	
b. Private Office	120	
		775
2. Commercial Loan		
a. Work Area	1540	
b. Private Office	240	
c. Private Office with	150	
d. Receptionist	150	
e. Storage	80	
		2160
3. Teller Line		
a. Work Area	1090	
b. Waiting Area	1090	
		2180
4. Personal Banking		
a. Work Area	2800	
b. Private Office	200	
		3000
5. Exhibit Area		
-incorporated with teller line waiting area		
6. Note Cage		
a. Work Area	340	
b. Waiting Area	60	
		400

7. Vault Cage		
a. Work Area	605	
b. Private Office	125	
c. Vault	320	
d. (5) Deposit Box	150	
Inspection Booths		1200
8. President's Office		
a. Office	300	
b. Receptionist	150	
c. Washroom	50	
		500
9. Information Area		
a. Work Area	150	
b. Waiting Area	200	
		350
10. Womens Restroom		200
11. A.T.M.		150
TOTAL		10915 sq. ft.

FUTURE REQUIREMENTS

DEPARTMENT	SQUARE FEET	
1. Time Pay		
a. Work Area	665	
b. Private Office	120	
		775
2. Commercial Loan		
a. Work Area	1660	
b. Private Office	240	
c. Private Office with	150	
d. Receptionist	150	
e. Storage	100	
f. Conference Area	200	
		2500
3. Teller Line		
a. Work Area	1600	
b. Waiting Area	1600	
		3200
4. Personal Banking		
a. Work Area	3400	
b. Private Office	200	
c. Conference Area	200	
		3800
5. Exhibit Area		800-1000
6. Note Cage		
a. Work Area	340	
b. Waiting Area	300	
		640

7. Vault Cage		
a. Work Area	975	
b. Private Office	125	
c. Vault	400	
d. (8-10) Deposit Box Inspection Booths	240-300	
		1800
8. President's Office		
a. Office	300	
b. Receptionist	150	
c. Washroom	50	
		500
9. Information Area		
a. Work Area	150	
b. Waiting Area	200	
		350
10. Women's Restroom		200
11. A.T.M.		150
12. Men's Restroom		200
	TOTAL	15110 sq.ft.

PROGRAM COMPARISON

Department	PRESENT REQUIREMENTS			FUTURE REQUIREMENTS		
	Personnel	Desks	Sq.Ft.	Personnel	Desks	Sq.Ft.
1. Time Pay	8	8	775	9	9	775
2. Commercial Loan	8	8	2160	12	12	2500
3. Teller Line	Varies	9	2180	Varies	12	3200
4. Personal Banking	11	13	3000	13	15	3800
5. Exhibit Area	N/A	N/A	None	N/A	N/A	800-1000
6. Note Cage	Varies	3	400	Varies	3	640
7. Vault Cage	Varies	4	1200	Varies	4	1800
8. President's Office	2	2	500	2	2	500
9. Information Desk	2	2	350	2	2	350
10. Womens Restroom	N/A	N/A	200	N/A	N/A	200
11. ATM Room	N/A	N/A	150	N/A	N/A	150

TIME PAY

A. Function - Process automobile dealer loans and run credit checks on loan applicants.

B. Present Requirements -

1. Square feet: 775
2. Number of Personnel: 8
3. Number of Desks: 8
4. Special Needs or Equipment

   a. Private office
   b. Small vault
   c. Note typer
   d. Microfilm machine
   e. Monroe calculator
   f. Waiting chairs for 6 people

C. Future Needs -

1. Square feet: stable
2. Number of Additional Personnel: 1
3. Number of Additional Desks: 1
4. Additional Needs or Equipment

D. Degree of Privacy -

1. Semi-Private

COMMERCIAL LOAN

A. Function - Process all business, commercial and agriculture related loans.

B. Present Requirements -

1. Square feet: 8160
2. Number of Personnel: 8
3. Number of Desks: 8
4. Special Needs or Equipment

   a. Private office with receptionist
   b. Private office
   c. Storage
   d. Nine file cabinets
   e. Waiting chairs for 6 people

C. Future Needs -

1. Square feet: 2500
2. Number of Additional Personnel: 4
3. Number of Additional Desks: 4
4. Additional Needs or Equipment

   a. Conference room (200 sq.ft.)

D. Degree of Privacy -

1. Semi-Private

Note: The agriculture loan department may be separated from the commercial loan department.

TELLER LINE

A. Function - Deal with public for minor account transactions such as, check cashing, deposits and withdrawals.

B. Present Requirements -

1. Square feet: 2180
2. Number of Personnel: variable
3. Number of Desks: 9 teller windows
4. Special Needs or Equipment

   a. Customer waiting area
   b. Writing counters
   c. Teller machine at each window
   d. Coin counter
   e. Three CRT computers

C. Future Needs -

1. Square Feet: 3200
2. Number of Additional Personnel: variable
3. Number of Additional Desks: 3 teller windows
4. Additional Needs or Equipment

D. Degree of Privacy -

1. Public

PERSONAL BANKING

A. Function - Process the opening of new accounts, loan applications, and answer specific questions or complaints by the customer.

B. Present Requirements -

1. Square feet: 3000
2. Number of Personnel: 11
3. Number of Desks: 13
4. Special Needs or Equipment

   a. Private office
   b. Storage files

C. Future Needs -

1. Square feet: 3800
2. Number of Additional Personnel: 2
3. Number of Additional Desks: 2
4. Additional Needs or Equipment

   a. Conference area

D. Degree of Privacy -

1. Semi-Private but with high accessibility to the public

EXHIBIT AREA

A. Function - A multi-purpose space for exhibits and displays.

B. Present Requirements - None

C. Future Needs -

1. Square feet: 800-1000
2. Number of Additional Personnel: N/A
3. Number of Additional Desks: N/A
4. Additional Needs or Equipment

D. Degree of Privacy -

1. Public

NOTE CAGE

A. Function - Accept all payments for loans.

B. Present Requirements -

1. Square feet: 400
2. Number of Personnel: variable
3. Number of Desks: 3 teller windows
4. Special Needs or Equipment

   a. Waiting area
   b. Storage file for old notes

C. Future Needs -

1. Square feet: 640
2. Number of Additional Personnel: stable
3. Number of Additional Desks: 0
4. Additional Needs or Equipment

   a. Additional waiting space

D. Degree of Privacy

1. Public

VAULT CAGE

A. Function - Handle all inter-bank transactions of money. The bond desk controls access to the safety deposit boxes.

B. Present Requirements -

1. Square feet: 1200
2. Number of Personnel: variable
3. Number of Desks: 2 desks, 2 teller windows
4. Special Needs or Equipment

   a. Private office
   b. Vault
   c. 5 safety deposit box inspection booths

C. Future Needs -

1. Square feet: 1800
2. Number of Additional Personnel: 0
3. Number of Additional Desks: 0
4. Additional Needs or Equipment

   a. Increase the number of safety deposit boxes by 400-500 boxes
   b. 3-5 additional inspection booths
   c. Additional waiting space in front of bond desk

D. Degree of Privacy -

1. Public to Semi-Private

Note: Department must be located near the vault

PRESIDENT'S OFFICE

A. Function - Office of the President.

B. Present Requirements -

1. Square feet: 500
2. Number of Personnel: 2
3. Number of Desks: 2
4. Special Needs or Equipment

    a. Receptionist
    b. Washroom

C. Future Needs -

1. Square feet: 500
2. Number of Additional Personnel - 0
3. Number of Additional Desks: 0
4. Additional Needs or Equipment

D. Degree of Privacy -

1. Private - appointment only

INFORMATION AREA

A. Function - Provide information and direct the customer to a specific department.

B. Present Requirements -

1. Square feet: 350
2. Number of Personnel: 2
3. Number of Desks: 2
4. Special Needs or Equipment

   a. Waiting area for 6 people

C. Future Needs -

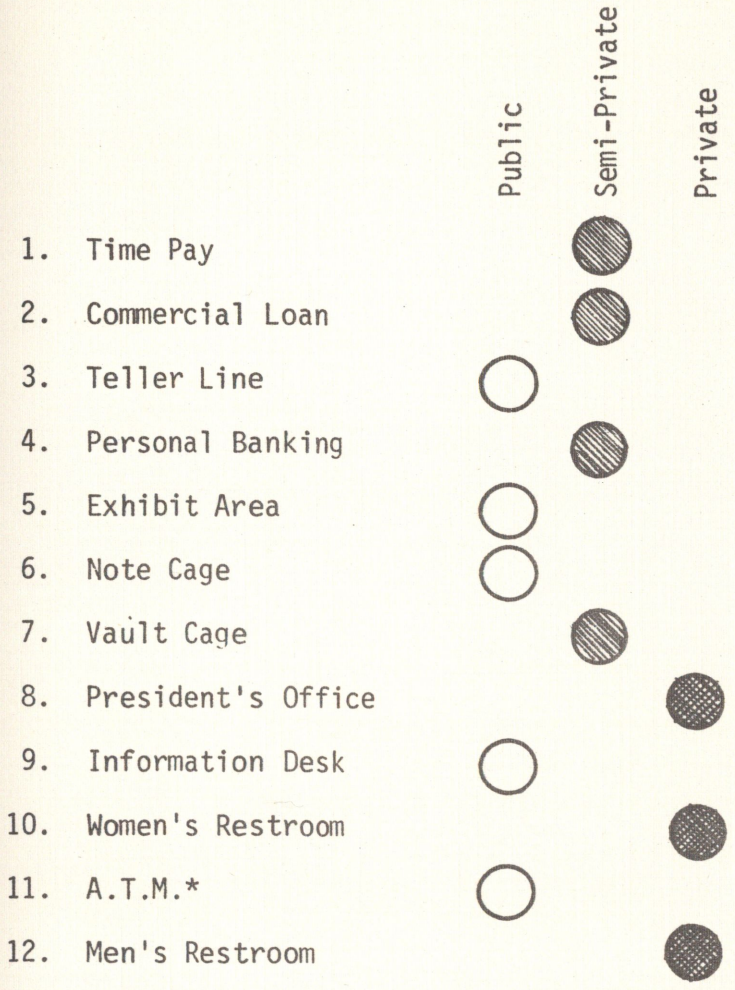
1. Square feet: 350
2. Number of Additional Personnel: 0
3. Number of Additional Desks: 0
4. Additional Needs or Equipment

D. Degree of Privacy

1. Public

Note: This area needs to be highly visible to the public.

DEGREE of PRIVACY



Definitions:

Public - Accessible during work hours.
Semi-Private - Accessible on a limited basis, appointment not necessarily required.
Private - Accessible only by appointment.
* - 24 hour accessibility

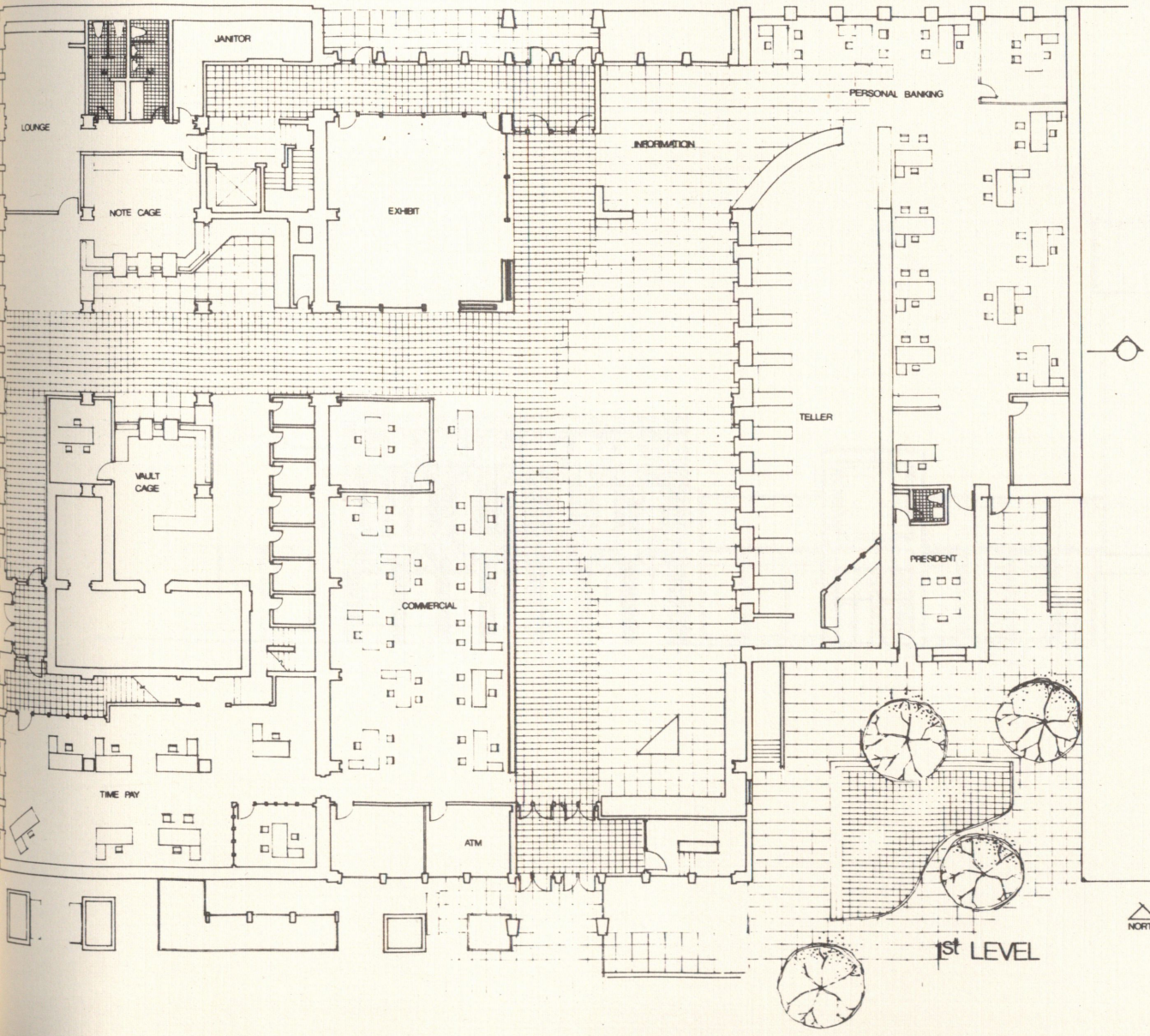
PROGRAM - 2nd LEVEL

SECOND LEVEL - APARTMENTS

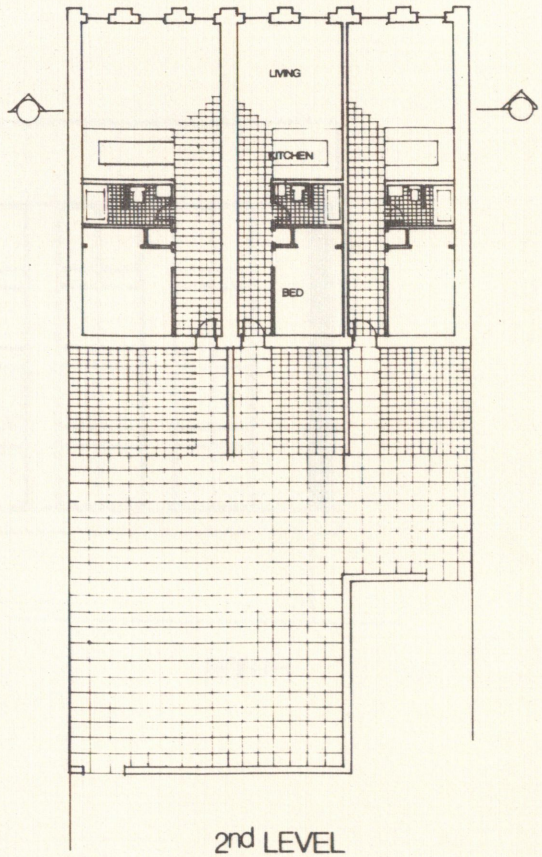
3 Apartments With:

Living Space	250-300
Sleeping Space	100-125
Cooking Space	100
Bathroom	75-100
Storage	Variable
Patio	Variable

THE DESIGN

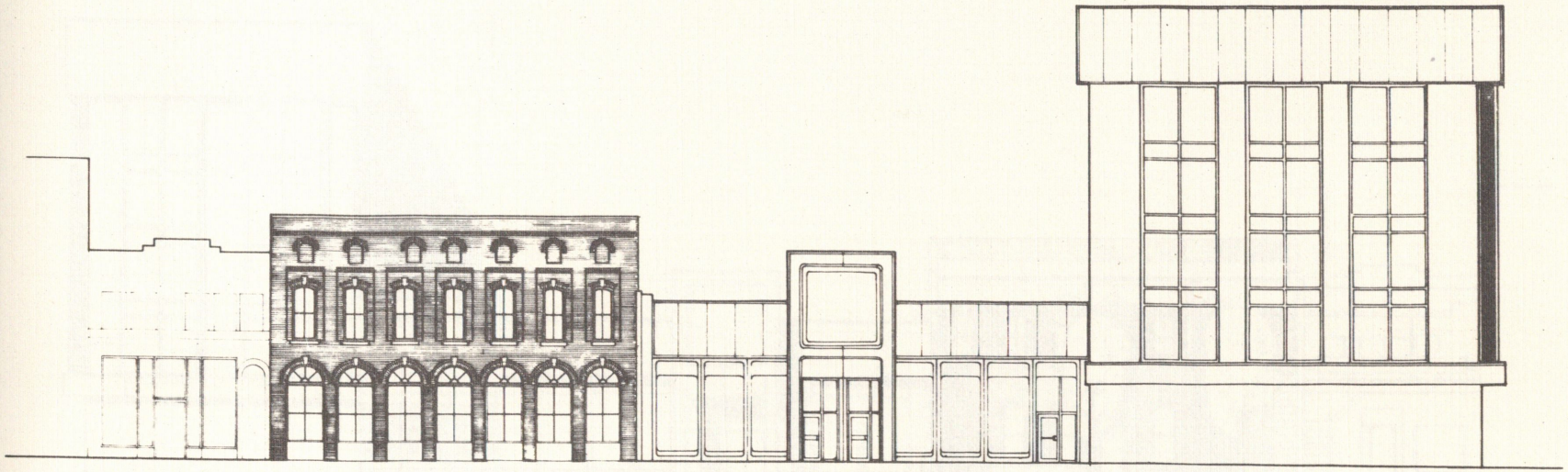


1st LEVEL

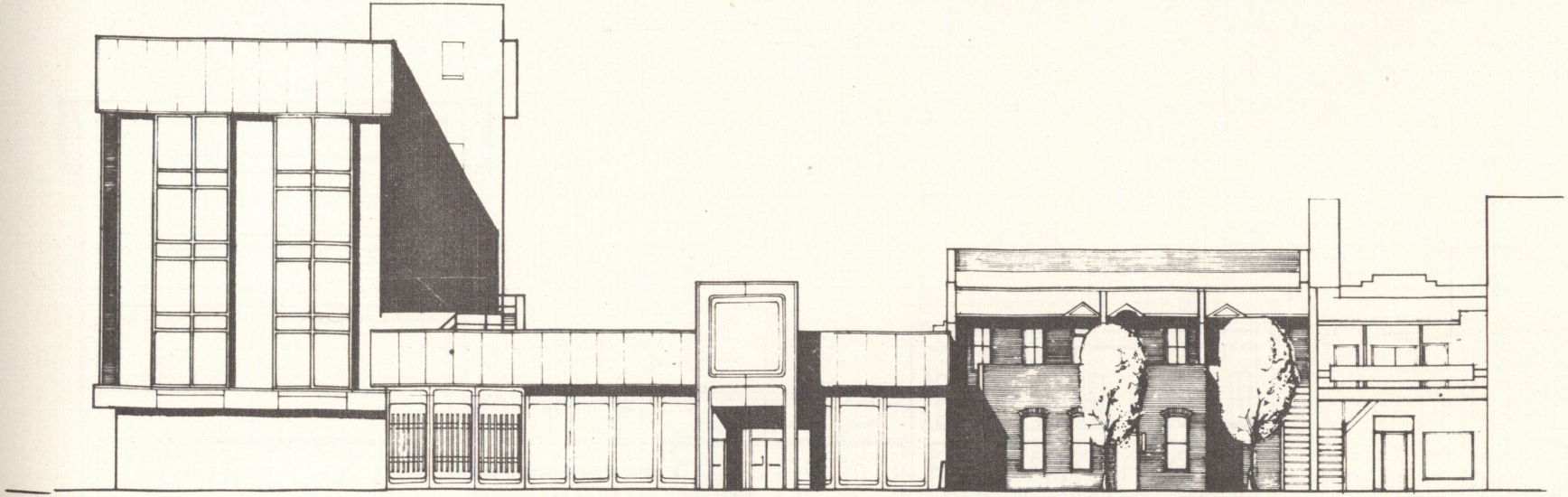


2nd LEVEL

COOPER BUILDING



NORTH



SOUTH



SECTION

12. GOLDEN RULE BUILDING

The Golden Rule Building, presently occupied by the Stylon, is located at 18 East Main Street. The building is adjoined on the west by the Masonic Temple and by the Gold and Silver Exchange to the east. The building is two stories with retail on the lower level with the upper level vacant.

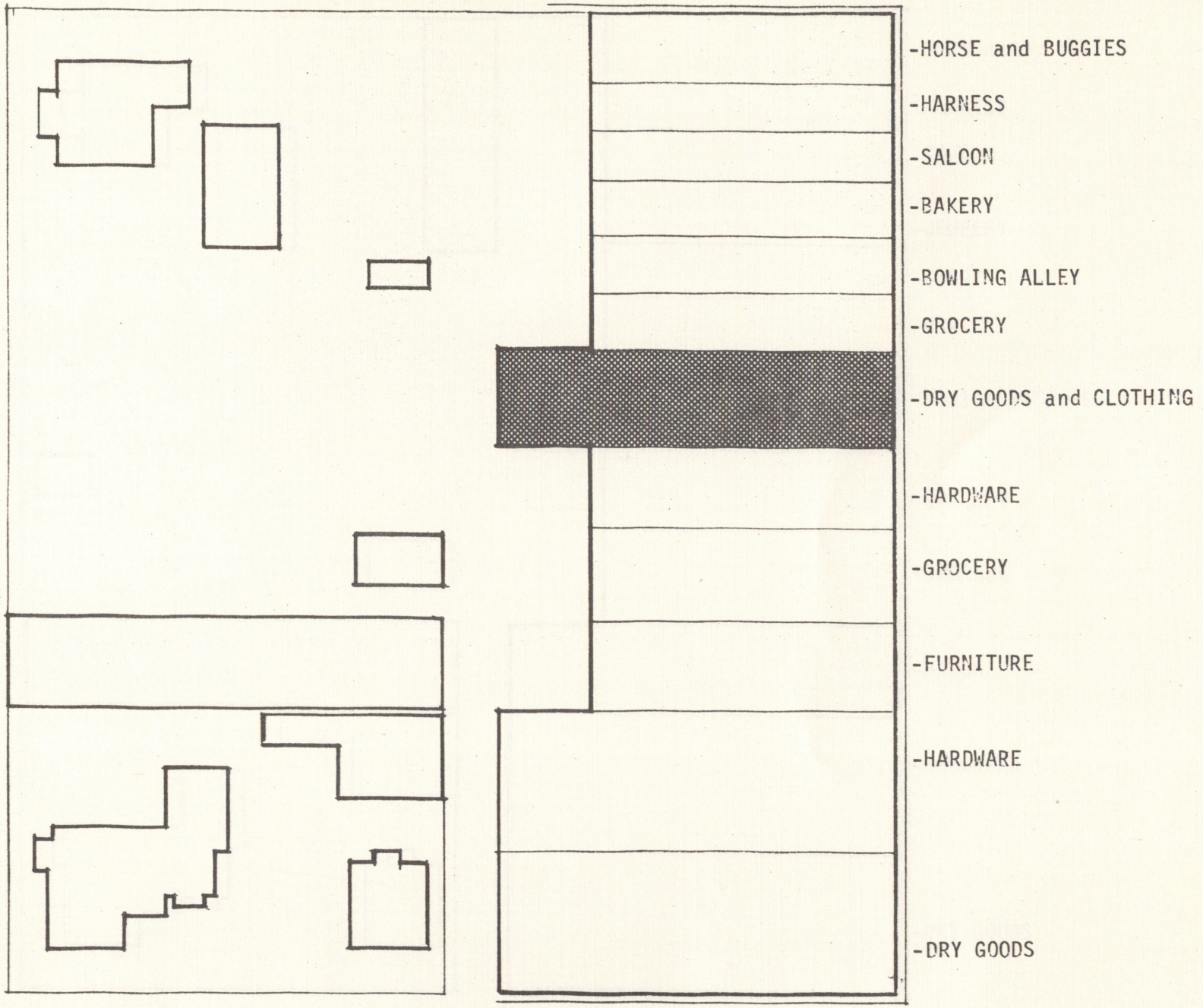
The building was built in 1901 by the Golden Rule, a merchantile chain store which had facilities in Montana and Wyoming. The store was owned and managed by Burr Fisher, son of O. W. Fisher, a prominent businessman in Seattle, Washington. The 1901 Golden Rule store replaced a previous store which was located next door. The Golden Rule built a new store one block west, presently Chambers-Fisher Department Store, and moved in 1906. The Gem Theatre occupied the building from 1909 to 1921. Montana Power used the building as their main office and demonstration hall from 1921 until the late 1950's. The building is

presently housing the Stylon, a women's clothing store.

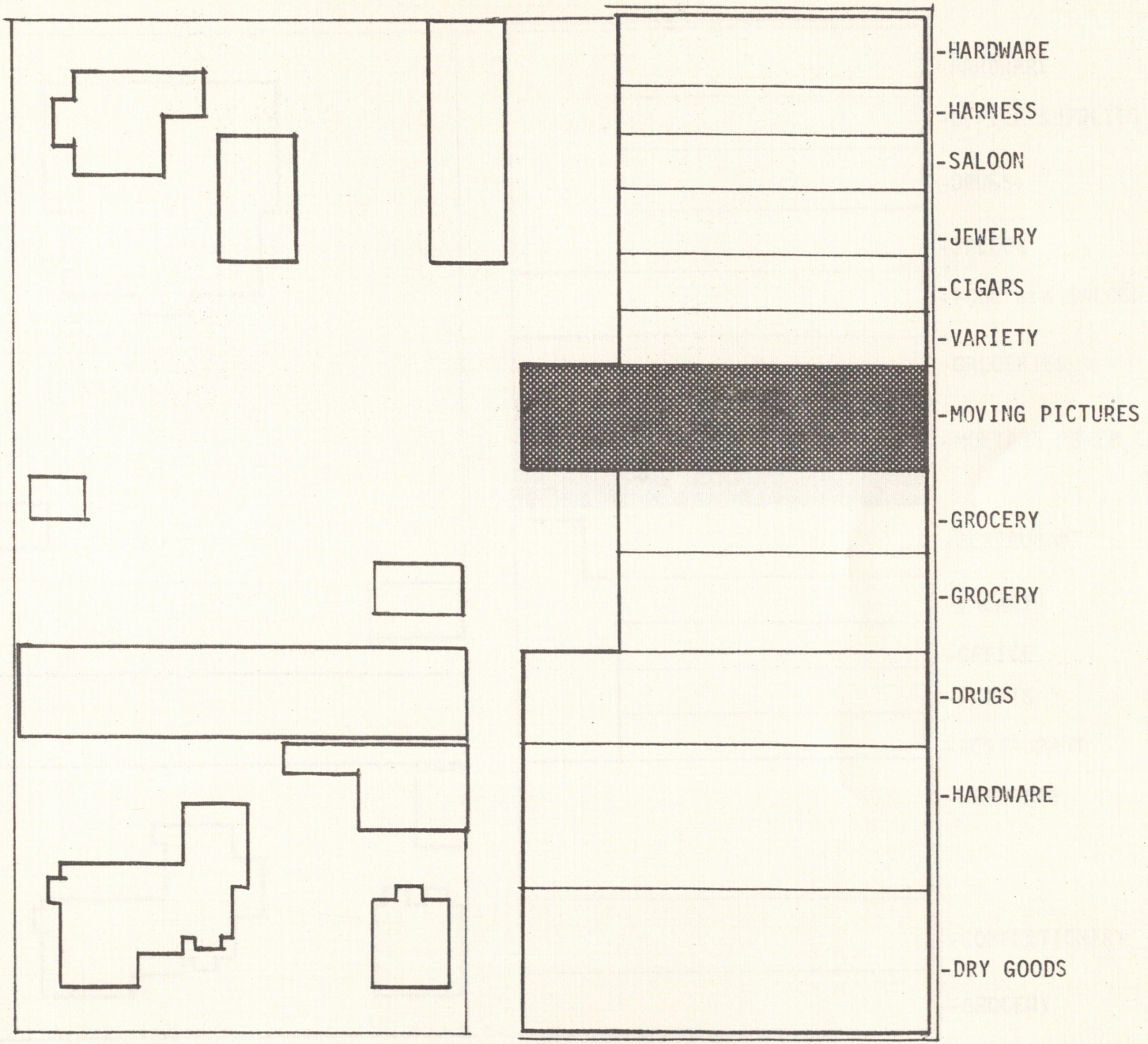
The building has undergone several alterations on both the first and second level. The first level was changed from a plate galss store-front to terra-cotta arches when the Gem Theatre occupied the structure. Montana Power removed the arches and re-instated the plate glass store-front. Also during this period, the bay windows on the second level were removed. The pressed tin urns and centering device were recently removed due to deterioration.

The second level of this building is vacant and is being considered by the owners daughter for use as a loft apartment and jewelry making studio. The proposal for this building involves the reuse of the second level to meet the needs of the daughter.

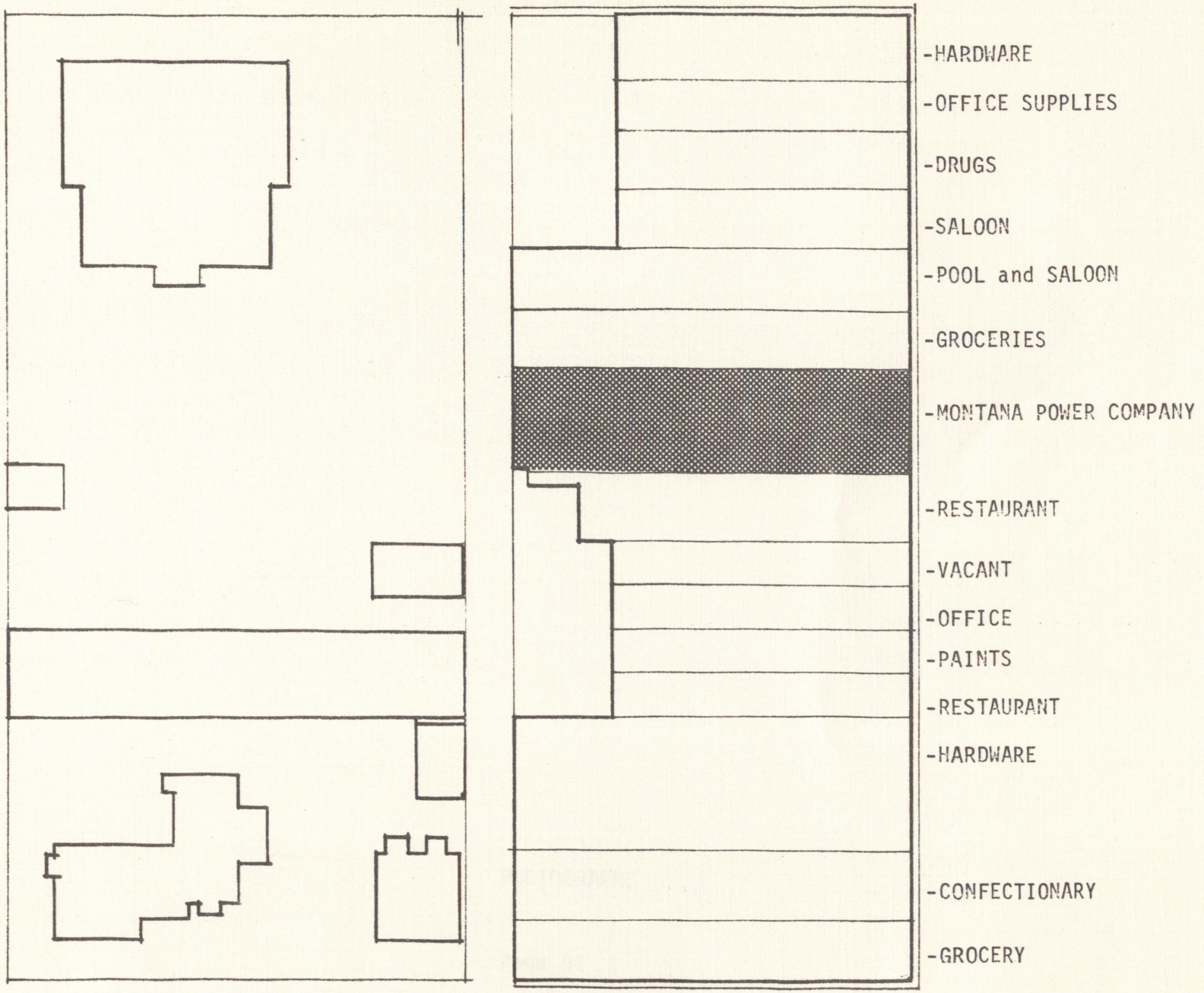
SANBORN MAPS


-HORSE and BUGGIES
-HARNESS
-SALOON
-BAKERY
-BOWLING ALLEY
-GROCERY
-DRY GOODS and CLOTHING
-HARDWARE
-GROCERY
-FURNITURE
-HARDWARE
-DRY GOODS

1904


-HARDWARE
-HARNESS
-SALOON
-JEWELRY
-CIGARS
-VARIETY
-MOVING PICTURES
-GROCERY
-GROCERY
-DRUGS
-HARDWARE
-DRY GOODS

1912


-HARDWARE
-OFFICE SUPPLIES
-DRUGS
-SALOON
-POOL and SALOON
-GROCERIES
-MONTANA POWER COMPANY
-RESTAURANT
-VACANT
-OFFICE
-PAINTS
-RESTAURANT
-HARDWARE
-CONFECTIONARY
-GROCERY

1927

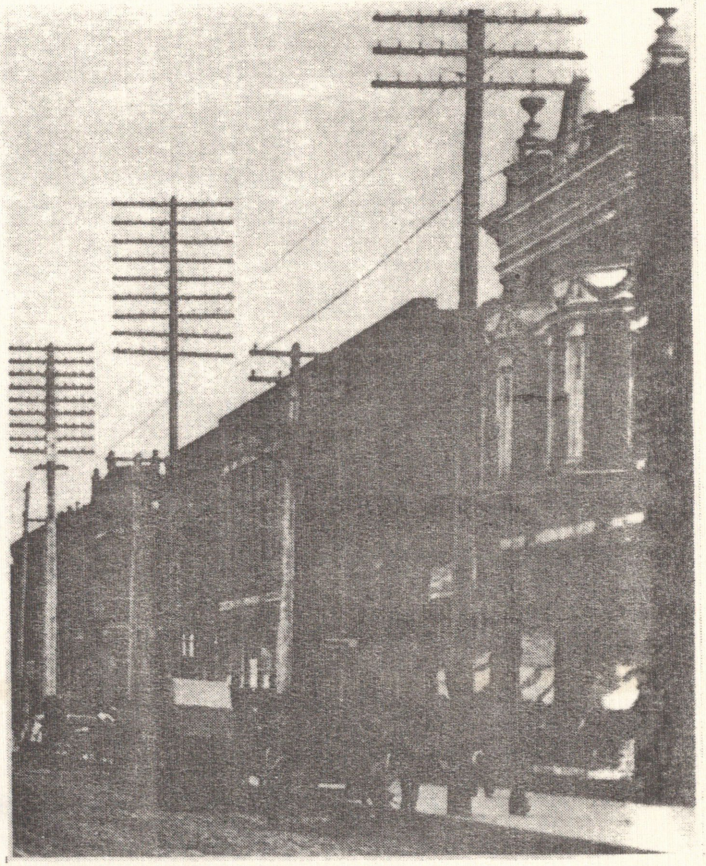
PHOTOGRAPHS



Golden Rule Building 1950's
note the absence of the bay
windows and the alteration of
the storefront.

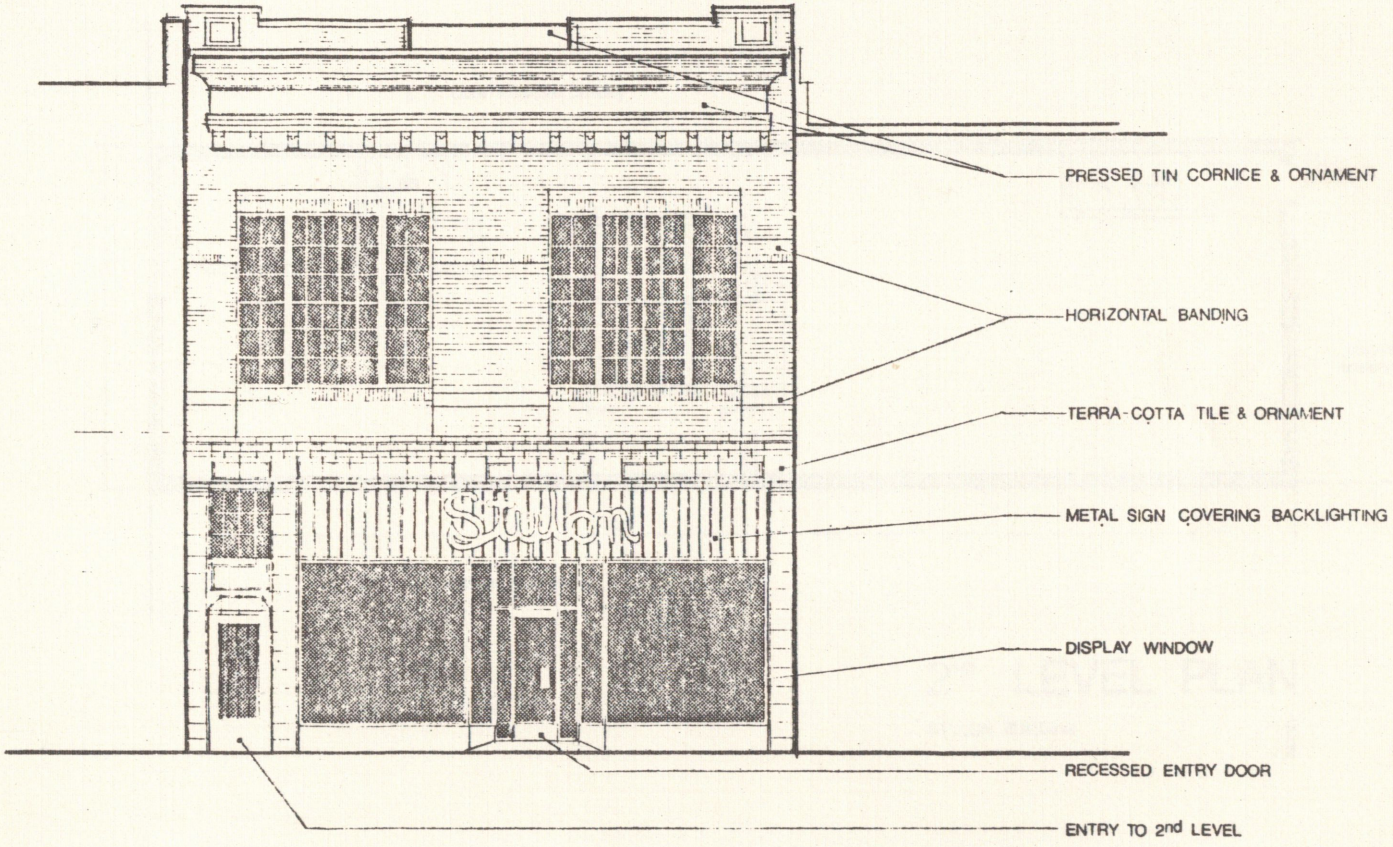


Golden Rule Building (Stylon) 1981

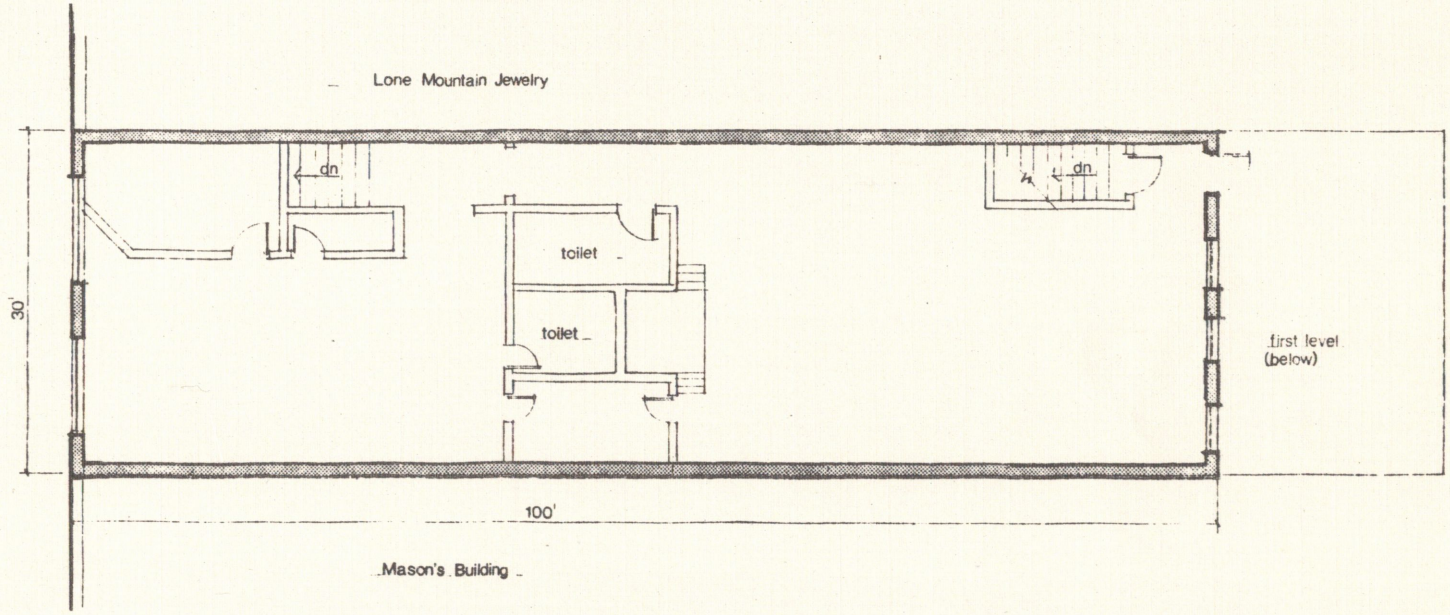


Golden Rule building ca. 1906
Note the bay windows and finnials.

ANALYSIS OF EXISTING BUILDING


PRESSED TIN CORNICE & ORNAMENT
HORIZONTAL BANDING
TERRA-COTTA TILE & ORNAMENT
METAL SIGN COVERING BACKLIGHTING
DISPLAY WINDOW
RECESSED ENTRY DOOR
ENTRY TO 2nd LEVEL

FEATURES



2ND LEVEL PLAN

STYLON BUILDING

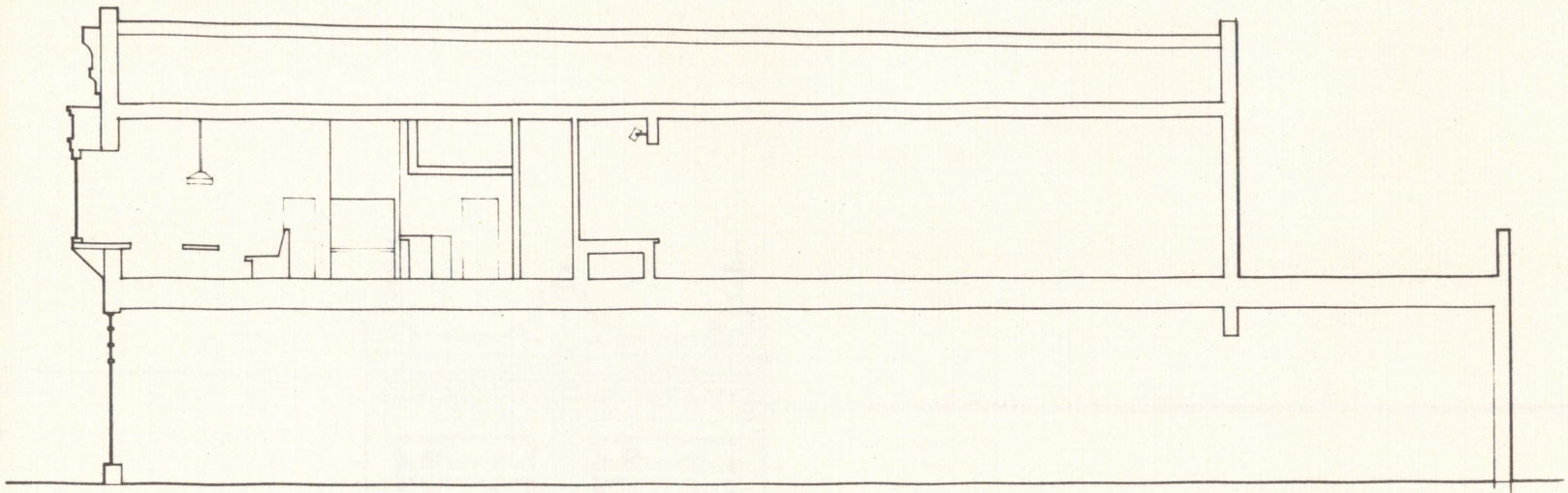
North

PROGRAM - 2nd LEVEL

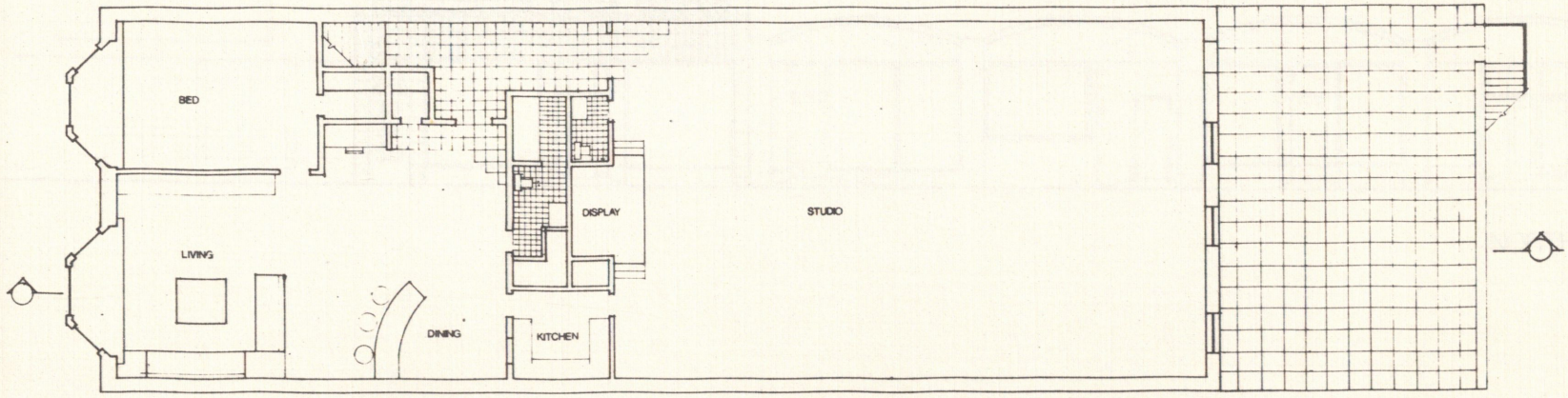
SECOND LEVEL - APARTMENT and STUDIO

Living Space	400-500
Sleeping Space	150-200
Cooking Space	100-150
Bathroom	100
Storage	100
Study	100
Studio	Variable

THE DESIGN



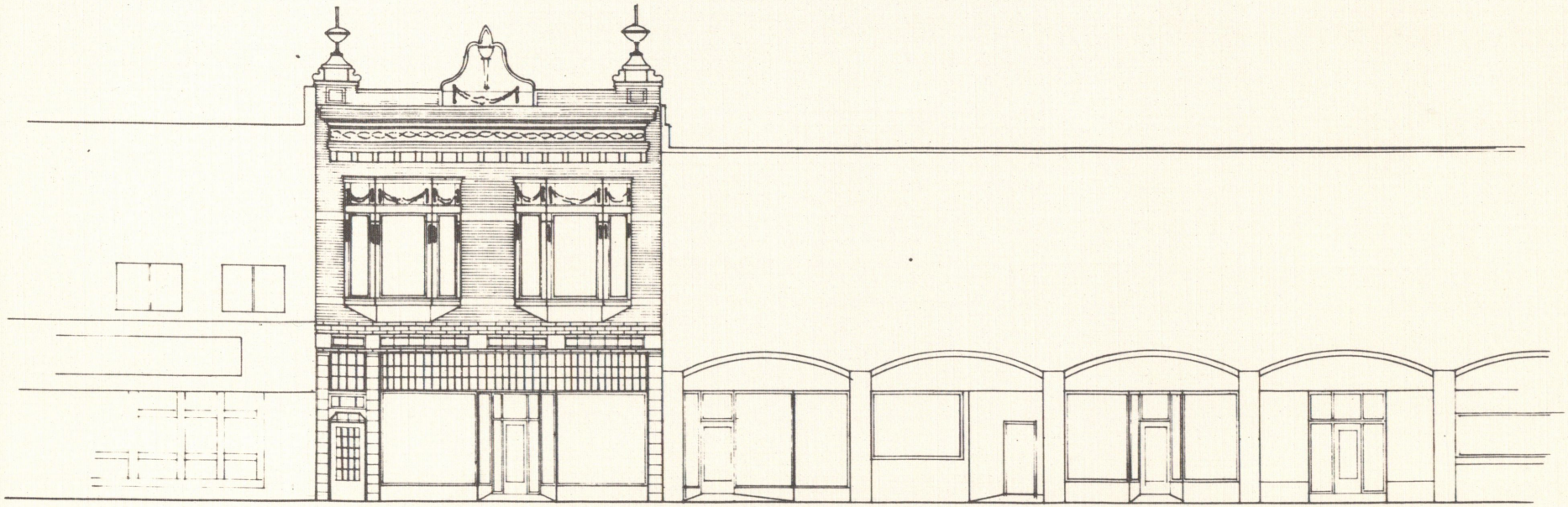
SECTION



2nd LEVEL

NORTH

GOLDEN RULE BUILDING
[Stylon]



NORTH

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ANNOTATED BIBLIOGRAPHY

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Period photographs, on file at the Historical Library, Helena, Montana.

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