10-2-2003

Talking Points, Story Mansion SAE (Sigma Alpha Epsilon) House

Max S. Baucus
Senator * or Department*: BAUCUS

Instructions:
Prepare one form for insertion at the beginning of each record series.
Prepare and insert additional forms at points that you want to index.
For example: at the beginning of a new folder, briefing book, topic, project, or date sequence.

Record Type*: Speeches & Remarks

MONTH/YEAR of Records*: October-2003
(Example: JANUARY-2003)

(1) Subject*: Talking Points
(select subject from controlled vocabulary, if your office has one)

(2) Subject* Story Mansion - SAE House

DOCUMENT DATE*: 10/02/2003
(Example: 01/12/1966)

* "required information"
Memo

To: Jim Foley
From: Mandy Drysdale
Sent: October 2, 2003

Subject: Story Mansion Talking Points

- Max has supported the restoration of the SAE house since the local grassroots organization began in 2001, not only as Bozeman's defining landmark and for its priceless historic value but the role in the community--its possibilities for economic development and heritage tourism.
- Max has had representatives involved since initial attempts to protect the landmark property.
- Max worked with Senator Burns, Representative Rehberg, Story Mansion taskforce/trust members, City of Bozeman officials and residents to support the City's purchase of the mansion and surrounding grounds.
- Max submitted a request for $3.5 million in the VA-HUD appropriations bill in March 2003.
- Max garnered attention for the project with an on-site visit during August 2003, with an evening reception, tour, invited guests, including four generations of the Story family.
- Max was instrumental in U.S. Senate Appropriations Committee including $500,000 for the project on September 4, 2003. The bill must now be debated on the Senate floor and conferenced with the House before being sent to the President.
- "Restoring the Story mansion in Bozeman to facilitate its use as a vital tool for fostering economic development within the Gallatin Valley and as an important conduit between Montana State University, the business community in Bozeman, and the public is a priority for me," said Baucus noting the heartfelt, emotional commitment of the community working together to save the historic landmark.
Kuban, Sara (Baucus)

From: Drysdale, Amanda (Baucus)
Sent: Wednesday, November 19, 2003 7:10 PM
To: Kuban, Sara (Baucus)
Subject: RE: story mansion

Project: Restoration of the historic and well-known T.B. Story mansion in Bozeman to facilitate its use as a vital tool for fostering economic development within the Gallatin Valley and as an important conduit between Montana State University, the business community in Bozeman, and the public.

Brief Description: An appropriation of $3.5 million is sought to fully restore the Story mansion, its adjacent carriage house, and the large grounds surrounding it, which would be used as a public park. Given ongoing threats to the historic integrity of the property and years of deferred maintenance, urgent action is needed.

Executive Summary: Anyone who passes through the heart of Bozeman's renowned historic district on their way to Montana State University is left awe-ins pired and impressed by the historic Thomas Byron Story mansion along Willson Avenue. As one prominent historian notes: "The Story mansion is of unparalleled historic and architectural importance in Bozeman. It is difficult to imagine a place that is more familiar to local residents--and more appreciated--than this exceptional, one-of-a-kind historic landmark. Arguably no property has inspired as much local pride or contributed as much to Bozeman's unique heritage, identity and cherished sense of place. As such, this irreplaceable National Register of Historic Places listing is unquestionably worthy of determined and timely historic preservation efforts." As the original estate created by the son of one of Montana's famous pioneer families, the mansion is beloved as a community touchstone; and indeed it is the centerpiece of Bozeman's visionary Historic Conservation Overlay District, which has become a model for other communities across the country. Some eighty years ago, the mansion was purchased by the Sigma Alpha Epsilon fraternity and has been the proud residence of more than 1,000 SAE alumni who have gone on to graduate from MSU and today represent a who's who of business leaders in the state and indeed the nation. The Story mansion and the adjacent carriage house have suffered, however, from years of deferred maintenance and since the late 1990s, the fraternity has attempted to sell the buildings and one-block square grounds on the open real estate market. However, given the restoration needs and the strong desire from the fraternity and the community to keep the site historically protected and in tact, a suitable buyer has not been found. What we propose with this funding request is the means to bring to fruition an innovative public-private partnership that would be made possible by support from both the City of Bozeman, which would acquire the property, and the federal government, which would provide badly needed funds to bring about restoration.

Congressional Action Needed: An appropriation of $3.5 million to adequately restore both the mansion and carriage house, making both fully publicly accessible, shoring up foundation work, and facilitating their transformation from single family/fraternity living into functional conference spaces also suitable for a wide variety of university functions. We fully anticipate this would be a one-time appropriation request, though it would go a long way toward permanently protecting Bozeman's most visible historic landmark, which
has been of inestimable value to generations past and untold numbers of Montanans in the future.

Importance to Montana. Funding at the amount requested would allow necessary restoration to take place. Some have placed the restoration estimate at between $4 million and $5 million but we have fully explored options for a more economical way to get the job done and still deliver maximum public value. The result would be an unprecedented venue in the Gallatin Valley, and indeed very likely across Montana, that would serve as a venue at where the research and development investments at MSU would be showcased; where the university and business entrepreneurs could converge for vital community functions; and indeed where the surrounding green space would serve as not merely a park but as a permanent outdoor home for such vital citizen-galvanizing events as the Bozeman Symphony and Shakespeare in the Parks. At present, no such venue exists in the Gallatin Valley and such a site would only enhance and complement the kind of venues which already exist in the private sector. Indeed, across the country, historic sites like this one serve as anchors for the kind of economic activity that serves not only as incubators for bringing about New Economy development but in sending signals to companies considering relocation to communities that are attractive because they honor and respect their sense of history, and their proud connection to the past. Unfortunately, in an equal number of other places, the failure to protect and preserve these historical treasures has resulted in only the sorrowful lament of lost opportunity. In Montana today, the Story Mansion represents a golden opportunity for public dollars to serve as vital fuel for creating the engine that will drive our economy in this new millennium. It promises to deliver a wide variety of dividends for business and community. The funds appropriated by Congress would be part of a larger package, including an investment made by the City of Bozeman for purchase and monies fund raised locally. The university's involvement, because of tough economic times in Montana, would not amount to a direct contribution but a steady flow of uses to the buildings and grounds to deliver a steady cash flow that would be applied toward ongoing maintenance. The property itself would be managed by a special citizen-run management board, representing a wide cross-section of university experts, business people, and members of the local community.

Dear City Commissioners:

As someone deeply concerned about historic preservation, and a local resident who lives less than three blocks from the SAE property, I am taking this opportunity to voice my strong support for the City's acquisition of the historic T. Byron Story mansion at 811 South Willson Avenue.

There are several reasons why the City of Bozeman should give serious consideration to the recent offer made by the SAE fraternity to facilitate Phase One of a visionary proposal to make this property a focal point for achieving historic preservation and promoting economic development. Moreover, I believe that with a Congressional appropriation to complete restoration in Phase Two of the plan crafted by the Story Mansion Preservation Task Force, this site would be an invaluable resource for the kind of economic stimulus we are seeking in Montana.

The Story mansion is of unparalleled historic and architectural importance in Bozeman. It is difficult to imagine a place that is more familiar to local residents--and more appreciated--than this exceptional, one-of-a-kind historic landmark. Arguably no property has inspired as much

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local pride or contributed as much to Bozeman's unique heritage, identity and cherished sense of place. As such, this irreplaceable National Register of Historic Places listing is unquestionably worthy of determined and timely historic preservation efforts.

The City of Bozeman is the best candidate for ensuring the preservation of the Story mansion. The City has been historically committed to the promotion of preservation in its historic since the late 1980s, when it created eight historic neighborhoods and established one of the largest Conservation Overlay Districts in the nation. Moreover, unlike other well-meaning but hastily-organized preservation groups, the City of Bozeman is an established and legitimate body with the critically needed ability to partner with other local, regional, and national entities to develop and promote a feasible preservation agenda and generate the funding necessary to get the job done. The Mayor, the City Manager, and key representatives from Montana State University, the Gallatin Development Corporation, the Montana Preservation Alliance, the National Trust for Historic Preservation, and Conrad Burns' office have already had serious discussions on the matter. They have come to the same conclusion: this is an idea of considerable merit and the time to act is now.

Acquiring the Story mansion need not be a long term commitment for the City of Bozeman, but rather a short-term commitment with long-term consequences. Rather than purchasing the property and immediately launching into an expensive full-blown restoration project, the City would be wise to commit to temporary ownership and then establish feasible timetable for incremental improvements. First and foremost the City could legally erase the lot lines and establish conservation easements. Such action would forever guarantee that the property not fall victim to insensitive proposals that subdivide the lot, permanently change its original appearance, and severely limit the possibility that a new owner could receive historic rehabilitation tax credits and other sources of governmental funding that almost certainly would be needed for eventual restoration. Once this admirable goal is accomplished, the City could open the Story mansion to public uses by Montana State University and others to generate needed cash flow for operations. This exciting partnership between the City, the University, and local residents could dovetail with a concerted fundraising campaign to address critical maintenance needs, thereby minimizing future rehabilitation expenses while better ensuring an increasing property value during the time the mansion is in public hands. Grants and other sources of funding could also be utilized to offset the initial cost of acquisition, and those savings could then be passed on to a future preservation-minded buyer.

While some critics will undoubtedly argue that the City should spend its limited resources on other needs, it is hard to conceive of an expenditure that would be remembered and appreciated by future generations as much as saving the Story mansion. For nearly seventy years local residents have bemoaned the fact that the original Story mansion on Main Street could not be spared from demolition. "Why," countless residents have said to me on numerous occasions, "couldn't the City have figured out a way to save this important landmark?" Let's not make the same decision this time. Now we have a chance to act--a chance to make a different choice with the hope of preserving the past for present and future generations. Please consider the possibilities before it is too late. Your children and grandchildren will be glad that you did.

Sincerely,

B. Derek Strahn, former Historic Preservation Officer

11/19/2003
Hey Mandy~

I'm doing a release on funding for Story Mansion and was wondering if you would please send me a brief summary of the history of the place. I'm just wondering how SAE acquired the Story Mansion — did they purchase it or was it a gift?

And rumor has it you definitely would have the inside scoop seeing as you are a story! © - Anything brief and informative you could send me right away would be much appreciated.

Thank you!

SK ☺
MEMORANDUM

To: Senator Baucus
From: Mandy Drysdale
Date: Monday, August 4, 2003, 6:00 p.m.
Event: Story Mansion
Where: 800 block of South Willson Avenue, Bozeman

Format: We will meet Mike Miles and other members of the Story Mansion Trust and/or Bozeman Historic Preservation Advisory Board and guests on the lawn in front of the Story Mansion. The purpose of the gathering is to be informational and designed to bring you up-to-speed on the progress and status of the purchase and renovation of this unique Bozeman area structure which 'has enormous and wide ranging support throughout Bozeman and the Gallatin Valley'. There will be finger food and drinks. Mike will introduce you to the guests and then ask Story Mansion Task Force and Bozeman Historic Preservation Advisory Board Co-Chair Todd Wilkinson, journalist/writer, to provide a brief history on the acquisition of the mansion, the next phase and where you may be of assistance. Ben Lloyd will present the estimated costs of restoration). Subsequently, other attendees may add comments. Todd has asked Derek Strahn, respected Bozeman historian, previous City preservation planner and currently Bozeman High Civics teacher to guide a brief tour for you of the mansion.

Chronicle Editor Rick Weaver, will be there with a photographer.

Statement: You made a request of $3.5 million in the VA-HUD appropriations bill for the Story Mansion. You’ve been working together with Senator Burns and Congressman Rehberg. The VA-HUD Bill has not yet passed out of the Subcommittee on the Senate side. The House passed their VA-HUD approps bill off the floor on July 25. VA-HUD bill this year is extremely controversial because of an insufficient allocation. Veteran’s healthcare is underfunded as in Armericorps. VA-HUD is expected to be one of the last appropriations bill dealt with this year.

Questions: What, if any is your reaction to this project? Also, Todd Wilkinson will ask you if you have any questions.

Enclosed: Chronicle editorial support article and recent status/summary article with Senator Burns quote.

SUMMARY: DATES OF INTEREST IN THE CAMPAIGN TO SAVE AND RESTORE THE T.B. STORY MANSION

In spring 2003, the City of Bozeman moved to purchase the Story Mansion from the SAE Fraternity for $1.28 million. The action came in the wake of SAE’s unfruitful efforts to sell the one-square block landmark property on the private real estate market (in
such a way that would have protected it and resulted in it’s badly needed restoration). Numerous development proposals that had been advanced-and met with strong citizen opposition - called for subdividing the property in such a way that would have permanently destroyed the character of the Story site, which has connections to one of Montana’s oldest and best known frontier families and is held up as an icon reflecting the special character that exists in Bozeman.

Testifying in favor of city acquisition (none spoke out against it) at an Over-flowing city commission meeting were more than 30 individuals. All experts and citizens who have joined the Story Mansion campaign, including noted architect Jim McDonald, who oversaw restoration of the state capitol in Helena, and who recently won the contract to undertake a $25 million restoration of the famous Old Faithful Inn in Yellowstone, say that without congressional support (which would enable the project to move forward quickly), efforts to restore the Story will prove extremely difficult.

In response to a public funding request submitted by the Story Mansion Trust for $3.5 million to members of Montana’s congressional delegation, all three of our elected officials-Senators Burns and Baucus and Congressman Denny Rehberg-have expressed strong support and has vowed to try and deliver at least a portion of the funding in the FY '04 budget appropriations process. Senator Burns said he is committed to funding in the appropriations process and he said he would work, with due diligence in concert with Senator Baucus, to ensure the request is given prominent status. Application has been made for 501 c 3 status. But the project is desperately depending upon the $3.5 million appropriation

During the spring, First Lady Laura Bush unveiled a new federal initiative called Preserve America that focuses on safeguarding important pieces of America's history and natural history. The Story Mansion campaign fits squarely within the Parameters of interest that Mrs. Bush outlined in pointing to heritage tourism as a promising tool for promoting patriotic community pride and economic development.

In late May, a luncheon and information gathering session hosted for Sen. Burns brought good attention including media coverage.

During the recent Historic Preservation Days, over 900 local citizens, showed up on the lawn of the Story Mansion for tours and ice cream. Interest in tours was so strong they extended over into another day. Moreover, hundreds of citizens volunteered to help with restoration.

Also, the Montana Preservation Alliance hosted an all-day workshop in the Story Mansion lead by Jim McDonald with dozens in attendance to address restoration needs and possible public/private uses that would be suitable.

This project would serve as a catalyst for broader economic development and heritage tourism; generate self sustaining income from paying events; and provides the public with opportunities for public use. The Architectural Assessment will be delivered to members of Montana's delegation in early September.