

**MISSOULA**

**MIDTOWN**

ASSOCIATION

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# MIDTOWN MASTER PLAN

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WHITEPAPER

Written for the Missoula Midtown Association by

Emily Brock  
Grace McKoy  
Mike Peissig  
Lauren Hutchison  
Mark Bellon  
Corey Aldridge

With assistance from Janna Lundquist

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# EXECUTIVE SUMMARY

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In January 2020, due to unprecedented and exhilarating growth in Midtown Missoula, and in anticipation of more changes to come, the Missoula Midtown Association (MMA) adopted strategic goals calling for the creation and implementation of a Midtown Master Plan. Recognizing the pressing need for cohesion around a vision that embraces our existing character, encourages equitable development, and promotes healthy urbanism, the Midtown Association formed a whitepaper committee to lay out the path to make a Midtown Master Plan a reality. The committee, which is made up of both MMA board leaders and members, convened virtually and met with community leaders over the summer of 2020. The whitepaper is broken up into four sections: goals, project scope and cost, Midtown Association structure, and interview findings.

Even amidst the pandemic, Midtown is growing rapidly. Without a community plan for the area, we risk being caught flatfooted when market demand for development increases beyond our community capacity to manage it. A haphazard approach to revitalization will likely lead to frustration for developers and local officials as well as poor outcomes for current residents or gentrification that pushes them out of Midtown altogether. A well-developed plan created through an inclusive process will offer predictability and preserve the qualities we love about Midtown.

Midtown's everyday retail, affordable home ownership, and available parking are qualities associated with a different experience than anywhere else in town. New development should preserve and enhance this character with features like gathering spaces to nurture social connectedness, transit and bike/pedestrian networks to allow physical connections, and access to parks, trees, and vegetation to reduce heat islands, noise, and air pollution. An equitable Master Plan will help Missoula take care not to attract development for prosperity's sake alone, but to improve all outcomes for those working and living in our community.

The Midtown Association itself is also at a crossroads. We can maintain the status quo of a small volunteer-led organization or achieve our strategic goal of increasing membership to 500+ supported by a full-time, professional team. Now is the moment to take an organizational leap forward by engaging a dynamic, professional director who will bring us to the next chapter. Therefore, this whitepaper also addresses the structural changes that must occur for the Midtown Association to undertake a project of this magnitude.

To assess the financial feasibility and established institutional appetite for a comprehensive Midtown Master Plan, we conducted 28 targeted interviews of private and public sector community leaders. The response was overwhelmingly supportive, in no small part due to the success of the Downtown Master Plan. Community leaders see an urgent need for a Midtown Master Plan and are willing to fund it. Many recognize an opportunity for creativity around 21<sup>st</sup>-century land use as a silver lining to our current situation with the pandemic. Our whitepaper committee was painfully aware that disenfranchised populations were underrepresented in the exercise. Meaningful participation from all residents will be a critical component of the Master Plan, and the overall scope of work for the project reflects an added emphasis on participation from traditionally marginalized stakeholders.

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# GOALS OF A MIDTOWN MASTER PLAN

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When we initiated the whitepaper process, the stated goals of the Midtown Master Plan were threefold: to inform public investment, create predictability for private investment, and hone the Midtown brand to attract more business to our area. Through community conversations, it became apparent that our goals must be more expansive and inclusive. Despite good intentions, some previous community public involvement efforts have fallen short of including the voices of everyone. We have learned, through the whitepaper process, that for redevelopment of Midtown to be successful, the goals of the project must explicitly state our intention for it to remain a place for people with limited means and other privileges and include them in the process in new ways.

As we work through the Master Plan and engage populations underrepresented in the process to-date, new goals will certainly emerge. The following goals are recommended as a jumping-off point for the project:

**Provide a voice for the people who live in, work in, and utilize Midtown.** Create a space for residents, workers, and users to articulate the unique characteristics that should be preserved. Discover new ways to engage disenfranchised populations and implement their ideas.

**Promote equitable development.** Ensure neighborhood balance with factors that promote healthy urbanism like affordable housing and retail, nearby groceries, manufacturing and other living-wage jobs, business incubation space, accessible parks, clean indoor and outdoor environments, quality education and growth opportunities, social gathering spaces, and mobility for all people and modes with reliable and safe transportation connections.

**Create predictability for private investment.** Attract and retain development that meets the community vision for Midtown. Provide a clear path forward, so developers have fewer hurdles when approaching design, permitting, zoning, and regulatory agencies.

**Promote a sense of belonging.** Nurture the social fabric of Midtown. Promote positive and diverse human interaction. Hone and promote the Midtown brand and drive right-sized business in the area. Maintain existing and attract new businesses that meet the needs of a safe and connected neighborhood.

**Leverage local dollars to attract Federal infrastructure funding.** Position Midtown for large capital grants to build transformative infrastructure, such as transit, which serve new and existing populations. Improve the Brooks Street Corridor to meet the multimodal transportation pressures of growth in Midtown, Miller Creek, and the Bitterroot Valley, while improving – and not sacrificing – livability. Improve east-west connectivity in Midtown.

**Build on existing planning initiatives for Midtown.** Incorporate previous work. Several studies have been done of the area, each building on the previous effort. This will be the most ambitious scope of work to-date and should incorporate work from the last two decades years, including the Urban Renewal District III Plan (2000), the ULI Report (2003), and the Brooks Street Corridor Study (2016).

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# PROJECT SCOPE AND COST

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The Missoula Midtown Association is fortunate to have a successful and encouraging big sister in the Downtown Missoula Partnership. Partnership staff have served as mentors in launching the Midtown Association, and its planning successes have paved the way for the Midtown Master Plan.

Over a decade ago, the first rendition of a Downtown Master Plan was conceived to set an ambitious path for economic development and prosperity in Downtown Missoula. At the time, the concept of a “Master Plan” was new and it took coaxing by Downtown leaders to convince businesses and the community that it was a worthwhile investment of financial and human resources.

The effort proposed was the largest and most expansive community visioning process Missoula had ever undertaken. The price tag of \$350,000 was staggering to many. Through a strong implementation committee made up of public employees, businesses, and private citizens, the plan was executed with great success. Ten years and \$750,000,000 in private and public investment later, the originally balked-at sum has proven to be well worth it. Thus, in 2018, when it came time for a plan that moved Downtown forward for the next decade, Missoulians were eager to fund and participate in a second round of the process.

The Downtown Master Planning process has primed community leaders, residents, and businesses to successfully engage in a similar process for Midtown. However, many are quick to urge caution not to recreate the *same* Master Plan. Midtown and Downtown have very different identities, both of which are vital to Missoula.

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## SCOPE OF WORK

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The deliverable will be an all-inclusive Master Plan in multi-media format that accomplishes the project goals. It will incorporate a comprehensive strategy to engage public and private businesses, citizens, and stakeholders with an emphasis on disenfranchised populations. This will require innovative approaches to working directly with groups who are left out of traditional public processes. Likewise, there are multi-jurisdictional agencies located in Midtown including the City of Missoula, Montana Department of Transportation, and Missoula County. The Master Plan needs to be developed in close coordination with these agencies, as its success requires their backing, and in some cases, their adoption.

Work will begin by gaining a full understanding of the existing land use and infrastructure conditions, including conducting a review of all previous planning efforts for the area, such as those by Midtown Mojo. The effort will analyze the ability of the transportation network, utilities, and communications infrastructure to handle future land use, and if needed will provide recommendations for improvements that include cost estimates. The infrastructure needs assessment will dovetail with creating a land use plan that articulates the community vision and can be incorporated into governing policies. If needed, it will include zoning language to aid governing agencies in adjusting the code to encourage the type of development desired. Finally, the Master Plan will include implementation strategies to assist the community in prioritizing action items.

## PRIORITY AREAS OF STUDY

**People.** Demographic analysis of who lives, works, and plays in Midtown. Develop strategies to maintain their presence and welcome new users.

**Land use.** Community gathering spaces, food availability, commercial, mixed-use, residential, office, medical and institutional, educational, arts and entertainment, housing, parks, trails, and recreation.

**Traffic.** Transit, street design, Brooks Street Corridor circulation, slant street circulation, intersection design, east-west connections, Reserve Street and downtown connectivity, shared mobility, pedestrian circulation, bicycle circulation, and wayfinding.

**Infrastructure.** Sewer, water, storm sewer, communication and broadband, electricity, and lighting.

**Retail and commercial business development.** Support existing businesses and deploy development strategies to attract suitable new businesses to the area.

**Housing.** Affordability analysis, evaluating emerging post-COVID work/house models, equitable and complete neighborhoods. Prevent gentrification.

**Parking.** Long-range parking plan, in coordination with Missoula Parking Commission.

**Parks, trails, and recreation.** Evaluate and identify gaps in trails and park facilities and connections.

**Historic preservation.** Identify and celebrate Midtown's historic features.

**Arts.** Assess existing arts and cultural amenities and make recommendations for additional opportunities.

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## PROJECT BUDGET

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The scope will require a multi-disciplinary team comprised of civil engineers, traffic engineers, parking specialists, land-use planners, architects, economists, public outreach specialists, historians, cultural experts, arts experts, landscape architects, and local stakeholders. The estimated project schedule is 18 months, and the project budget is estimated to be \$450,000 to \$550,000.

### Evaluate existing conditions

\$75,000 - \$100,000

Analyze existing conditions, building off the Brooks Street Corridor Study and other previous efforts, with an emphasis on east-west multimodal transportation connections, parking, and land use conditions. Identify historic and cultural amenities. Conduct an economic conditions analysis and evaluate trends. Conduct a housing and demographic analysis. Conduct public outreach to gain insights about Midtown.

### **Develop a Vision**

\$225,000 - \$250,000

Develop and articulate a community vision and create a plan to achieve it. Utilize traditional design charettes and discover new and innovative ways to engage disenfranchised populations. Use technology to reach groups unable to attend in person. Identify regulatory and other barriers. Conduct further discipline studies if needed. Develop the first draft of the vision and plan to achieve it and collect community feedback. Continue roll out of iterations and collect feedback as needed, followed by presentation of final findings and recommendations.

### **Finalize master plan**

\$100,000 - \$125,000

Memorialize the vision in the final Master Plan document utilizing renderings and graphics to paint the picture as much as possible. Use video and new media to articulate the vision for people unfamiliar with planning documents. Develop a clear strategy to implement the plan. Draft recommendations for regulatory changes, if needed. Roll out documents to agencies, stakeholders, and the public for final comments.

### **Master plan adoption meetings**

\$50,000 – 75,000

Bring the plan to over a dozen agencies and boards for adoption. Assist agencies to incorporate the plan in the format their processes and policies require.

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# MIDTOWN ASSOCIATION STRUCTURE

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## ORGANIZATIONAL STRUCTURE

The Missoula Midtown Association exists to promote, advocate, preserve, facilitate, and enhance Midtown Missoula's commerce and community while providing an environment of cooperation to overcome challenges. We strive to be a dynamic organization with energy and commitment to the long-term success of Midtown. All businesses, interested parties, or individuals are eligible for membership in the Missoula Midtown Association and can join at any time. Suitability is not based on geographic location.

Based on this structure, the Missoula Midtown Association is currently taxed as a non-profit organization under IRS Code 501(c)6. A 501(c)6 qualified organization is typically an association or league of business owners that have united for a common purpose, like furthering the interests of their members within the local community or giving business owners a united voice with which to effect change. Examples include business leagues, chambers of commerce, and real estate boards. Dues paid or donations given to 501(c)6 organizations will not usually qualify as tax-deductible charitable contributions; however, they may qualify as a general business expense and reduce the taxable income of the contributing entity.

During our discussions with various government entities and other funding sources we noted that some organizations and granting agencies have policies against providing funding to 501(c)6 organizations as these organizations, by nature, are structured to provide benefits to their membership, not the general public-at-large. While the Missoula Midtown Association may be generally focused on Midtown Missoula, the Missoula Midtown Master Plan is focused on providing benefit to the *entire community*. After discussions with stakeholders, the Missoula Midtown Association Board of Directors, and legal counsel, it has been determined that it is in the best interest of the Master Plan to establish a 501(c)3 foundation for this and other projects that may require charitable gifts and public funding. The Midtown Foundation will have separate organizational documents, board of directors (although they can be the same people), and annual filing requirements. The Midtown Foundation will share staff and consultants with the Midtown Association.

On August 24, 2020 the Midtown Association signed a letter of engagement with Joel Kaleva of Crowley Fleck PLLP to create a new charitable organization as a Montana nonprofit public benefit corporation, assist with drafting bylaws and policies for the organization, and apply to the IRS for federal tax-exempt status. This process is moving forward, and we will be eligible to receive contributions to fund a Master Plan as soon as we file new articles of incorporation, which we anticipate will occur by the holidays.

## STAFFING STRUCTURE

The Midtown Association is at a crossroads. Currently it is a volunteer-run organization with small but growing annual membership revenue of about \$20,000. Expenses are minimal and usually limited to events, printing, and barebones overhead. There has been a recent increase in expenses associated with fees related to the Master Plan and forming a foundation. Currently there is about \$30,000 in the Association's checking account.

At the February 2020 meeting the board adopted the following strategic goals:

### THREE YEAR GOALS

- Grow from 50 to 300 members
- Hire a full-time Executive Director
- Create an Advocacy Committee
- Develop/write a Midtown Master Plan
- Diversify revenue: membership & non-membership (dues and non-dues)
- Hold a signature event – possibly an awards banquet

### TEN YEAR GOALS

- 500+ members
- Executive Director + additional staff (e.g., Events Coordinator, Membership Director, etc.)
- Implement the Master Plan
- Add additional non-dues revenue sources such as streetlight pole banners, Midtown gift card program, etc.

It is time for the Midtown Association to take an organizational leap forward; and it will come with some risk. To achieve our stated objectives, we must hire a professional director with fundraising, leadership, communication, event planning, community building, and project management skills. Because we have a small operating budget and the board is stretched, it would be unwise to take on the risks associated with an *employee*. Likewise, given our size, it is unlikely the Midtown Association would successfully attract an employee with the expertise needed to meet our objectives. Therefore, an *independent contractor* is recommended.

A qualified independent contractor's fee will likely be upwards of \$5,000 per month to achieve the goals the Midtown Association has laid out. In addition to managing the Midtown Association/Midtown Foundation and its projects, the contractor would be responsible for raising funds for operations, including their fees. The Midtown Association must recognize there will likely be an upfront investment as the consultant begins fundraising efforts. Below are some key differences between an employee and a contractor.



EMPLOYEE	INDEPENDENT CONTRACTOR
Usually works for only one employer.	Generally, provides consulting services to more than one company.
Works the hours set by the employer.	Sets his or her own hours.
Usually works at the employer's place of business.	Works out of his or her own office or home.
Often receives employment benefits, such as health and disability insurance.	Does not receive employment benefits from the employer.
Works under the control and direction of the employer.	Works relatively independently.
Accomplishes tasks in the manner the employer has requested.	Has the authority to decide how to go about accomplishing tasks and does so without the
Tends not to incur costs or make investments in the work.	Incurs the costs associated with performing the job.
Has a general education and experience background and receives special training from the employer in order to do the job better.	Has acquired very specialized skills and comes to the work relationship with a particularized education and experience background.
Receives net salary after employer has withheld income tax, Social Security and Medicare tax under the Federal Insurance Contributions Act (FICA).	Is not subject to tax or FICA withholding, but pays his or her own self-employment tax.
Will likely be eligible to receive unemployment compensation after lay off or termination.	Is not eligible for unemployment compensation benefits.
Will receive worker's compensation benefits for any workplace injury.	Is not eligible for worker's compensation benefits.
Generally (unless employment is "at will") can be terminated by the employer only for good cause and with notice.	Generally (unless the consulting contract is for a specified term) can be let go by the employer for any reason, at any time.
Is covered by federal and state wage and hour laws such as minimum wage and overtime rules.	Is paid according to the terms of the contract and does not receive additional compensation for overtime hours worked.
Has the protection of workplace safety and employment anti-discrimination laws.	Usually is not protected by employment anti-discrimination and workplace safety laws.
May be entitled to join or form a union.	Is not entitled to join or form a union.

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# INTERVIEW FINDINGS

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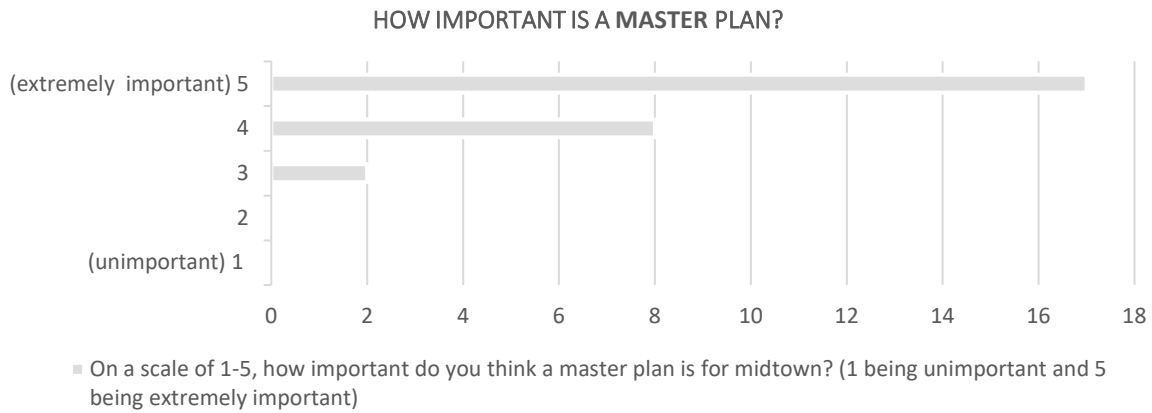
To assess the financial feasibility and established institutional appetite for a comprehensive Midtown Masterplan, we conducted 28 targeted interviews of community leaders. These interviews are not indicative of the diverse community-wide effort that we envision for the Midtown Master Plan itself.

The following community leaders were interviewed:

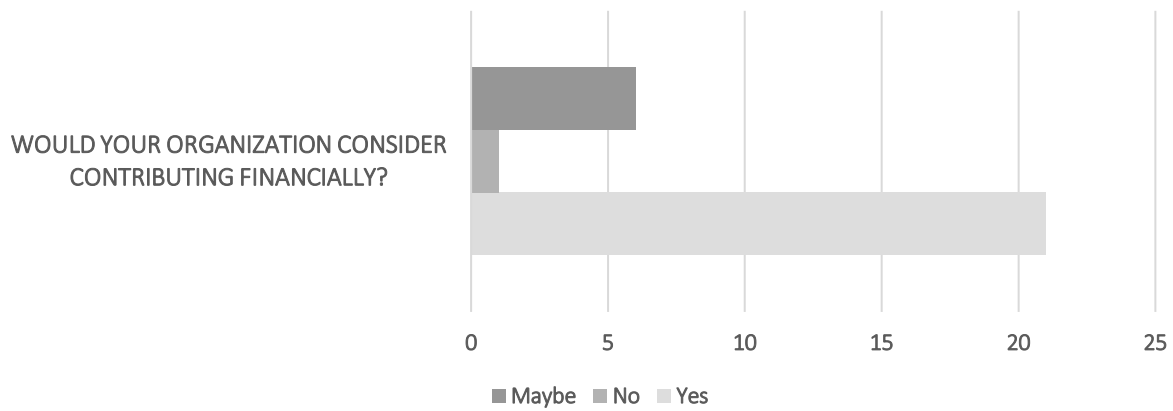
Aaron Brock	Donna Gaukler	Jesse Ramos	Priyanka Fernando
Aaron Wilson	D'Shane Barnett	Jim Blanchard	Ross Lane
Amber Sherrill	Ellen Buchanan	John Engen	Ruth Reineking
Barbara Nielan	Eran Pehan	Julie Merritt	Sandra Vesecka
Bob Burns	Grant Kier	Katie Carlson	Scott Burke
Charlie Beaton	Gwen Jones	Kim Latrielle	Steve Clawson
Claire Matten	Heather Foster	Linda McCarthy	Susan Hay Patrick
Dale Bickell	Heather Harp	Melanie Brock	Tom Severson
Dan Ermatinger	Jack Lawson	Nate Richmond	Whitney Bergmann

Overall, common sentiments emerged from many of our interviews, and were consistent with prior conversations among members and board members. People are thinking expansively about Midtown. Recent additions like OnX Maps, Notorious P.I.G., Big Dipper, Dram Shop, and Scheels are exciting for the area. However, without proper planning and infrastructure to support increasing demand, leaders believe the community will suffer a fragmented district that lacks human interaction, neighborhood connection, and sense of place. The explosion of housing in the Bitterroot Valley and South Missoula is also concerning for Midtown. Without planned transportation alternatives, demand for a Brooks Street highway will sever Midtown permanently.

Leaders believe establishing a vision and adopting consistent regulations will reassure developers of a predictable approval process and entice them to pursue Midtown projects. It will also protect the existing character and reduce change-anxiety for people who already live in Midtown. This will result in opportunities for right-sized businesses and non-profit entities to relocate to an affordable and dynamic district, where they can interact with the communities they serve with greater ease.



The intentional curation of affordable, diverse, mixed-use spaces will benefit residents of Missoula and surrounding communities, deepen their affection for Midtown, and create a thriving community designed for long-term sustainability. Community leaders feel the need for a Midtown Master Plan is urgent and are willing to fund it.



WHAT DO YOU THINK OF WHEN YOU HEAR THE PHRASE MIDTOWN MISSOULA?

**BROOKS STREET**  
GROWTH GREAT PARKING SCARY TO WALK FAIRGROUNDS  
AUTO CENTRIC LACKS GREEN SPACE SOUTHGATE MALL

When asked what they think of when they hear “Midtown Missoula,” almost half of all respondents interviewed (42.8%) identified the Brooks Street Corridor and the auto-centric nature of the current Midtown area. Many felt that the current traffic flow is not pedestrian-friendly, not conducive to bicycle travel, and a “heat island,” surrounded by a sea of asphalt lacking vegetation and character.

Other prevalent themes covered were the presence of community anchors like Southgate Mall, Community Medical Center, and the Missoula County Fairgrounds, and the increasing commercial presence in the area.

While improved traffic flow and aesthetic enhancements are desired, respondents identified Midtown as uniquely positioned for tremendous growth due to its large geography, abundant parking, and residential opportunities.

WHAT MAKES MIDTOWN UNIQUE AND IMPORTANT TO MISSOULA?

**AFFORDABLE** RESIDENTIAL REAL LARGE CENTRAL REGIONAL

The exceptional mix of human diversity, affordable housing, and affordable commercial space, combined with the central location and parking, are factors that make Midtown special to Missoula.

Unlike Downtown Missoula, which is geographically constricted and provides high-end amenities attractive to out-of-state tourists, Midtown meets a more regional demand. Western Montanans driving to the ice rinks, playing fields, and mall appreciate the parking provided by the large physical geography. And of course, many of those visitors will also enjoy Downtown. The recent surge in economic growth, spurred by incoming businesses and residential development potential, are strengths to capitalize on.

## WHAT DO YOU SEE AS AN OPPORTUNITY FOR MIDTOWN?

**TRANSIT**  
HIGH-DENSITY HOUSING **VEGETATION** HOTELS  
YEAR-ROUND FAIRGROUNDS PEDESTRIAN CONNECTIONS  
**ASPHALT CONVERSION**

According to interview respondents, Midtown has an opportunity to connect residents with the business community in a unique and meaningful way. Intentional mixed-use space combined with affordable high-density housing options that prioritize open, pedestrian-friendly space will set Midtown Missoula apart.

Year-round use of the Fairgrounds has been identified as an ingredient in the long-term success of Midtown. Perennial use of the Fairgrounds and Fort Missoula Regional Park is seen as a key to creating “sticky space,” designed to capture events and create an integrated experience for residents and visitors alike.

Incorporating green space, improving the traffic flow, and adding alternative transportation options throughout the Midtown area will not only allow for ease of use, but will result in a safer, more sustainable, and community-friendly hub.

## WHAT DO YOU SEE AS A THREAT TO MIDTOWN?

**NO COMMUNITY** SOUTHGATE MALL DYING  
**HIGHWAY DEVELOPMENT**  
**ONLINE RETAIL** POOR TRANSPORTATION  
**GENTRIFICATION** **NO PLAN**

In contrast to the multitude of opportunities identified during the interviews, a lack of a clear growth plan is the biggest threat to the success of Midtown. The public, private, and residential sectors should join forces to ensure successful community development and implementation of a Master Plan.

Southgate Mall has become a regional retail destination for Western Montana, drawing vital consumers to the Midtown area – to the benefit of other commercial entities. Given national, regional, and local trends indicating an increase in online shopping, exacerbated by the pandemic, there are growing concerns about brick and mortar retailers' long-term success.

While parking is in ample supply, the current Midtown traffic configuration prioritizes automobiles over people, concrete over vegetation, and function over experience. Addressing ailing transportation infrastructure will help Midtown transition from a task-oriented location to a sought-out destination.