City of Whitefish
Planning & Building Dept
418 E 2ⁿᵈ St │PO Box 158
Whitefish, MT 59937
Phone: 406-863-2410
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HOUSING MITIGATION PLAN

INSTRUCTIONS:

❑ A Pre-Submission Meeting with city staff and the Legacy Homes Coordinator is required.
Date of Meeting: _____

❑ Attach the following:
- Standardized deed restriction(s) for the Legacy Homes
- Site plan
- Unit designs
- Details on amenities and heating systems
- Estimated utility costs for Legacy rental units; the monthly rental prices should be adjusted if heat, electric, or water utilities are not included (Appendix B of Legacy Homes Program Administration)
- Estimated homeowner's association (HOA) structure and fees, if applicable
- A separate narrative, as needed

❑ A complete Housing Mitigation Plan must accompany a land use permit application and will not be accepted alone (§11-1A-5, WCC).

❑ The Housing Mitigation Plan will be approved as part of the land use permit.

A. PROJECT INFORMATION:

Project Name: _____

Street Address: _____

Assessor's Tract No.(s)_____ Lot No(s)_____
Block # _____ Subdivision Name _____
Section _____ Township _____ Range_____

I hereby certify that the information contained or accompanied in this application is true and correct to the best of my knowledge.

_____   _____
Applicant's Signature   Date

_____
Print Name

B. INCENTIVES USED
(check all that apply to this project; Planned Unit Development projects may use one column or the other but not both):

Conditional Use Permits:

❑ Reduced Parking for 2+ Bedroom: 20%

❑ Increased Maximum Bldg Height: 5-feet (3 floor max and not permitted in the WB-3 zoning district)

❑ Increase Lot Coverage: 10%

❑ Increase Density: 20%

Subdivision:

❑ Reduced Lot Size: 20%

❑ Reduce Lot Width: 10%

❑ Increase Lot Coverage: 10%

❑ Increase Density: 20%

C. LAND USE PERMIT TYPE ACCOMPANYING THIS HMP (check all that apply):

❑ Administrative Conditional Use Permit ❑ Minor Subdivision

❑ Conditional Use Permit ❑ Major Subdivision

❑ Planned Unit Development

D. OWNER/APPLICANT INFORMATION

OWNER(S) OF RECORD:

Name: _____ Phone: _____

Mailing Address: _____

City, State, Zip: _____

Email: _____

APPLICANT (if different than above):

Name: _____ Phone: _____

Mailing Address: _____

City, State, Zip: _____

Email: _____

OTHER TECHNICAL/PROFESSIONAL:

Name: _____ Phone: _____

Mailing Address: _____

City, State, Zip: _____

Email: _____

PROJECT DETAILS

1. Total Number of Residential Units Proposed by Type:
   _____ Single-family detached homes
   _____ Single-family attached homes (townhouses); in what number of buildings _____
   _____Multi-family (duplex, triplex, apartments, condominiums); in what number of buildings _____
   _____TOTAL

   _____Number of Legacy Home Units Required for Project (20% of TOTAL above)

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2. Are the Legacy Units proposed to be integrated into the project?

   ❑ Yes (Continue to Question 3)

   ❑ No (Skip to Question 11)

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3. _____ Number of Legacy Home Units Required for Project (See #1 above)

   Type and Number of Legacy Homes Units Proposed On-Site:
   _____ Single-family detached home
   _____ Single-family attached home (townhouses); in what number of buildings _____
   _____Multi-family apartments; in what number of buildings _____
   _____Multi-family condominiums; in what number of buildings _____
   _____Fraction of unit left over, for which in-lieu fee (ILF) will be paid
   \quad\quad $_____ ILF to be paid ($82,618 x fraction of unit)

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4. If the type of Legacy units does not match the type of Market units (single-family detached or attached, townhome, multi-family, etc.), provide justification below. Note: If all Market units are single-family detached homes, up to half of the required Legacy units may be attached single-family homes (townhomes) and the type of Legacy units required will be based on the needs identified annually by the City.

5. Indicate the price Legacy units are to be offered at and the household income levels (percent of Area Median Income [AMI]) those units are meant to target. Rental units are meant to be affordable to households earning 60%-80% of AMI and the average price of all Legacy rental units in the project must be affordable to households earning 70% AMI. Ownership units are meant to be affordable to households earning 80.1%-120% AMI and the average price of all ownership Legacy units in the project must be affordable to households earning 100% AMI. Attach additional sheet if more rows are needed.

Sales Price	Monthly Rent[1]	Target Household Income (%AMI)	Type of Unit	Size of Unit (sf)	# Bedrooms in Unit	# of Units Offered at Price

6. Number of bedrooms per unit in Project:

	All Units	Legacy	
	# Units	# Units	Proportion of Legacy Units for Each Bedroom Count
Studio/0 Bedroom			
1 Bedroom			
2 Bedroom			
3+ Bedroom			
Total			

The mix of the number of bedrooms offered in Legacy units must mirror the mix of bedrooms offered in the Market units, provided the mix is responsive to the needs and demographics of Whitefish residents. Legacy Homes with more than 3 bedrooms are not desirable. If Legacy bedroom numbers are not proportionate to Market bedroom numbers, provide rationale or justification:

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[1] Indicate whether heat, electric, and water utilities are included in the rental prices provided. Rental prices must be reduced if these utilities are not included.

7. The size of each Legacy unit may vary within a development, but no unit will be smaller than the minimum sizes, and the size of all units by type must meet the average sizes shown below.

# Bedrooms	Legacy Rental Units		Legacy Ownership Units	
	Minimum Size (sf)	Average Size (sf)	Minimum Size (sf)	Average Size (sf)
Studio/0 Bedroom	350	450	400	500
1 Bedroom	550	650	700	1,000
2 Bedroom	725	825	800	1,150
3 Bedroom	900	1000	1,100	1,300

Indicate the project's minimum and average size per Legacy unit type:

# Bedrooms	Legacy Rental Units		Legacy For-Sale Units	
	Minimum Size (sf)	Average Size (sf)	Minimum Size (sf)	Average Size (sf)
Studio/0 Bedroom				
1 Bedroom				
2 Bedroom				
3 Bedroom				

8. If a project's HOA's Covenants, Conditions and Restrictions (CC&Rs) define a minimum square footage for homes in the development, an exemption for Legacy Homes and their smaller square footages must be made. Provide the CC&R's and exemptions, if applicable.

9. Provide plans to illustrate, and indicate location of Legacy Homes relative to market rate units:

❑ Distributed evenly throughout development and/or buildings

❑ Clustered on same site as market rate units

❑ Different site from market rate units

Provide rationale or justification if Legacy units are not distributed evenly throughout the market rate units:

10. When phased construction is planned for a development, the proportion of Legacy units must be constructed in proportion to the market rate units constructed during each phase of development. Attach a proposed production schedule of Market and Legacy Homes, including issuance of building permits.

11. If the percentage of Legacy Homes provided on-site (plus a fractional ILF) in the project is less than 20%, what is the method of alternative compliance proposed?

   ❑ Provide Legacy Homes in off-site location

   ❑ Pay fee in lieu of Legacy Homes ($123,927 x required units = $_____)

   ❑ Provide land in lieu of Legacy Homes

   ❑ Provide a combination of methods listed above

   ❑ Other method proposed

Describe why and how the alternative method of compliance is justified and how it helps the City achieve its housing goals as established in the Strategic Housing Plan and meet the needs of the most current Housing Needs Assessment. (attach narrative on separate piece of paper, if needed)

12. Any other information to help City staff and the Whitefish Housing Authority determine compliance with the Legacy Homes Program.