MPA
MONTANA PRESERVATION ALLIANCE

# An Interpretive Outline for the Peter Whaley Homestead

## A Resource for Interpretation & Education on the Lee Metcalf Wildlife Refuge

Submitted by:

Montana Preservation Alliance

120 Reeders Alley

Helena, MT 59601


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# THE PETER WHALEY HOMESTEAD:

## A RESOURCE FOR INTERPRETATION & EDUCATION ON THE LEE METCALF WILDLIFE REFUGE

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## BACKGROUND & OVERVIEW

In February 2008, the Montana Preservation Alliance received a Preserve America grant from the National Fish & Wildlife Foundation to conduct Interpretive Planning and Stewardship for the Peter Whaley House, an important historical homestead located on the Lee Metcalf National Wildlife Refuge (the Refuge). The Refuge is owned by United States Fish and Wildlife Service and is located approximately two miles north of Stevensville, Montana, on the bottomlands of the east side of the Bitterroot River.

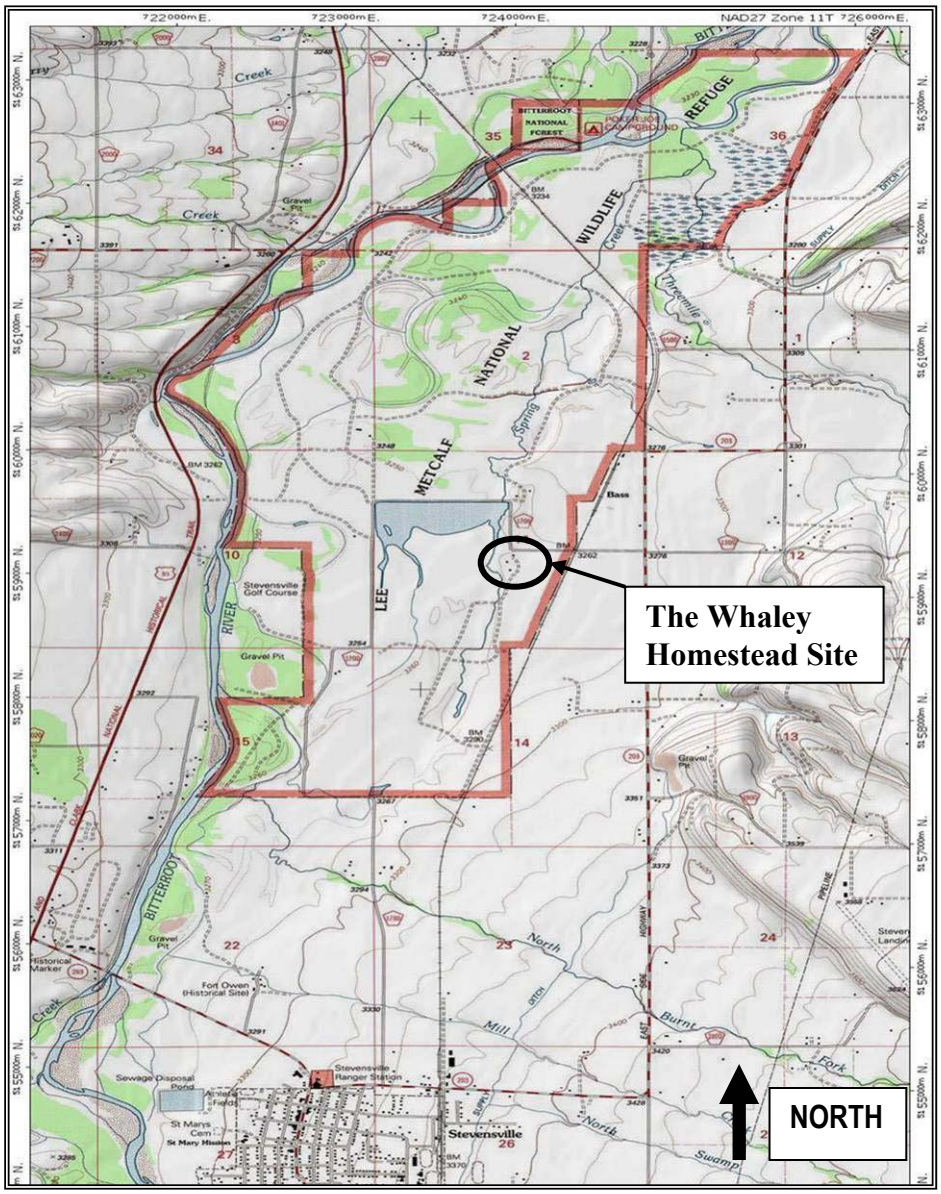
That same year, the Refuge initiated development of a Comprehensive Conservation Plan. This process will engage Refuge staff to evaluate the biological and habitat needs of the Refuge to meet their "Wildlife First" congressional mandate and in that process determine compatible public uses. This Interpretive Outline is intended to inform that process by providing an interpretive framework that recognizes the significant cultural and interpretive values of the Whaley House and the clear potential the homestead offers, to support the mission and federal responsibilities of the Refuge. While a detailed interpretive plan was beyond the scope of this project, this outline may serve as a broader basis for planning, and to provide direction for a new interpretive effort centered on the Whaley Homestead and related heritage themes.

The motivation for this project is the emerging recognition of the value of the homestead to the Refuge and the outside community, as well as an emerging consensus that restoration and reuse of the house benefits the Refuge and local residents, and retains the qualities that make the homestead historically unique. These special qualities include the community's rural character, and it's prehistoric, tribal, settlement and land use history, architectural values, and abundant, year-round recreational and conservation-based activities.

Over the last few years, the Refuge, the local community, and interested historic preservation organizations have made great progress in responding to the challenges and opportunities inherent in restoring the homestead. In 2008 and 2009, MPA staff, Refuge and Regional staff, community members, architecture, engineering and interpretive consultants, and Whaley family descendents participated in the evaluation and rehabilitation of the house. Refuge management made the Whaley House a top funding priority for FY2010.

The US Fish & Wildlife Service Region 5 recognizes the importance of the Whaley Homestead and committed to it as a top priority historic property for preservation. Beyond the active stabilization effort underway now, one of the most effective ways to preserve public heritage resources is to put them to use in an educational and interpretive context.

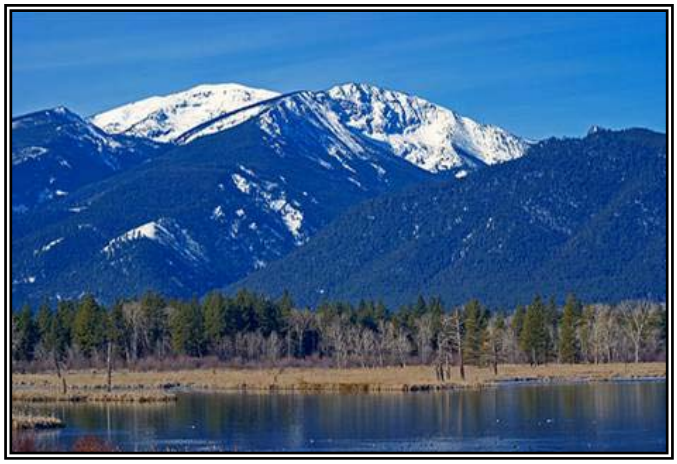
In addition, part of a federal agency's responsibility under the National Historic Preservation Act (36CFRSection 110) is to provide stewardship for historic resources under its management. We therefore recommend that all cultural resources on the refuge – the Whaley Homestead, Grube Barn, historic ponds, fields and shelterbelts, cultural landscape and any archaeological remains – be considered in the development of a comprehensive plan for the refuge.




**Location of the Lee Metcalf Wildlife Refuge & the Peter Whaley House.**

The Whaley Homestead is located along the primary entrance to the Refuge, on a gravel road (Wildfowl Lane) which extends west into the Refuge from East Side Highway 203.

## LEE METCALF NATIONAL WILDLIFE REFUGE FEATURES AND USE



Established in 1963, the 2,800-acre Lee Metcalf National Wildlife Refuge is located is the picturesque Bitterroot Valley of western Montana, at the base of the east slopes of the Bitterroot Mountain Range. Set along the scenic Bitterroot River, the Refuge shelters a tremendous variety of wildlife which thrives along the river and in its adjacent wetlands.

The Refuge is mandated to provide optimal habitat for Federally-listed endangered and threatened animal and plant species. A pair of bald eagles established a breeding territory on the Refuge in 1990; other raptor species such as the Peregrine falcon occasionally visit the Refuge. Providing sustainable fishery resources is another primary goal of Refuge management. Fish-eating birds such as ospreys, great blue herons, double-crested cormorants, bald eagles, belted kingfishers and other species depend on the Refuge's abundant fishery to survive. Overall, the Refuge has tabulated 235 species of birds, 37 species of mammals, and 17 species of reptiles and amphibians that are found, or could be found, on the Refuge.

While prior human use, such as the agriculture practiced at the Whaley Homestead, has altered the land from its original appearance, many native plants still exist throughout the Refuge. Overall, more than 400 plant species grow on the Refuge, viewable along the 2.5 miles of nature trails in the Refuge's Wildlife Viewing Area. Trails wind through meadows, along waterways and into the river bottom woodlands along the Bitterroot River.

Education and research also form a vital component of the Refuge's programs. Surrounded by wetlands and wildlife, the Refuge provides a natural outdoor classroom for a variety of educational opportunities which include Environmental Education, Montana Junior Duck Stamp Program, Youth Waterfowl Clinic, and Bitterroot Birding Festival. The University of Montana uses the Refuge as a living laboratory, and research projects include monitoring songbird productivity and survivorship as part of larger regional and national programs. Other research projects include biological control of undesirable weeds, and cowbird parasitism of songbird nests. Refuge staffers also monitor local populations of osprey, colonial-nesting water birds, waterfowl, shorebirds, and white-tailed deer.

## THE PETER WHALEY HOMESTEAD

### FEATURES AND USE

Lee Metcalf National Wildlife Refuge occupies lands which originally comprised the Peter Whaley Homestead, listed in the National Register of Historic Places. The direct link between the historic farmstead and establishment of the refuge represents a tremendous opportunity for education and interdisciplinary public interpretation, and for serving functional program needs of the refuge. Under the National Historic Preservation Act and other federal land management and environmental legislation, the refuge's responsibility to the public to provide stewardship for this resource can be met and enhanced by maintaining the homestead buildings and putting them into service to meet the needs of the refuge.

The Peter Whaley Homestead is one of western Montana's best preserved early homesteads. Since 1963, when the refuge was created, it has been a goal and federal agency responsibility to preserve and protect the Whaley Homestead. The Whaley Homestead was listed in the National Register of Historic Places in 1992, under Criteria A and C and the historically-significant themes of Agriculture, Architecture, and Exploration/Settlement. The Peter Whaley House is the Refuge's sole property currently listed on the National Register.

### CULTURAL ENVIRONMENT

The Salish & Pend d'Oreille Indians tell of living in this valley since the beginnings of human time, the valley known as Spe'tlemen in their language is the heart of their ancestral homeland. Through this broad, fertile valley flows the river the Salish call In-schu-te-sche, the River of Red Willows. Warmed by winds born over the Pacific Ocean, the valley teems with huckleberries, herons, lupine, deer and bears. Salish elders recall that long ago, a single Salish nation inhabited what is now western Montana; over time they formed distinctive tribes known now as the Salish and Pend d'Oreille, as well as the Couer d'Alene, Spokane, Colville and Okinagan. For thousands of years, Salish people followed a way of life in this mountainous country attuned to the seasons and the land – hunting buffalo and other game, catching fish, collecting plant foods and medicines, trading between tribes and bands.

The first recorded encounter between white Europeans and the indigenous people of the Bitterroot Valley occurred when the Lewis and Clark Expedition traversed the valley in September 1805, en route to the Pacific Ocean. The Salish took the explorers in, and "gave them fresh good horses" in exchange for their tired ones, and sent them on their way to the Pacific, along the ancient and rugged Lolo Trail.

Fur traders followed and in 1841, the Bitterroot became the first region of Montana to see EuroAmerican settlement, when Jesuit missionaries established St. Mary's Mission here at the invitation of the Salish people. Stevensville was the site of the first permanent town and settlement in Montana, which began with the Jesuit settlement. The mission gave rise to a multiracial agricultural community, drawing settlement by native people, miners, military soldiers and farmers. The mission closed but the settlement lived on, becoming the trading outpost Fort Owen, named after its owner, John Owen. The Fort, located just two miles south of the Whaley Homestead, drew agricultural settlement to the vicinity during the mid-1800s.

Peter Whaley, an Indian agent and contemporary of John Owen was one of the pioneering agricultural settlers in the Bitterroot. Peter, and his wife Hannah, Whaley moved into the Bitterroot in 1877, claiming 160 acres under the Desert Land Claim homestead act. Cultivation of farmland and construction of a two story, ten room, hewn log house soon followed.

Homestead filings by Whaley, along with son and daughter David and Julia Whaley resulted in a farm encompassing 400 contiguous acres, and improvements that included fenced fields, barns and outbuildings. All combined to create a farmstead that lasted here for a century.

The house is a masterful creation of dove-tail notched, hand-hewn log construction, clad with weatherboard siding and embellished with vergeboards. The log walls are well-crafted and a lasting example of craftsmanship of the late 19th century.

Like John Owen, Whaley was a U.S. government Indian agent on the Montana frontier, and after he retired from the agency in Montana's Mission Valley, he settled at Hellgate (near today's Missoula) in 1875, and then here. The founding of the homestead is reflective of important settlement patterns in the valley and is located just a couple of miles north, almost within sight, of Fort Owen. The Whaleys first cultivated their land and built a small log cabin nearby. Following settlement of an 1879 land claim dispute with the railroad, they moved the cabin upon this homestead and ca. 1880 completed this log house. Elements of the original log cabin may be included in the existing house.

Annual rainfall in the valley averages just thirteen inches, and early agriculture was marginal until a seventy mile long irrigation ditch, in place by 1905, distributed captured mountain snowmelt from a surrounding watershed of 2,500 square miles. During the 1800s, like many early Montanans, the Whaleys diversified their farming income – they raised livestock and operated a meat market in Stevensville, and were also invested in a sawmill in Florence and the Stevensville Hotel.

The house and farm sold in 1905 to Forest Plummer and Mary Carroll. Plummer was an associate of Marcus Daly, the famed Butte-Anaconda copper magnate and founder of nearby Hamilton, whose Bitterroot Stock Farm included a large equine operation raising blooded thoroughbreds and work horses. Plummer and Carroll too raised horses, and built several new buildings on the property during their tenure including a large horse barn.

The Bitterroot Valley Irrigation Company, founded in 1905, transformed agricultural prospects in the valley with completion of the 70-mile "Big Ditch." The BVIC purchased the homestead from Plummer and Carroll in 1909 and, as part of BVIC's project to develop and market orchard tracts throughout the valley, planted apple orchards on the former Whaley homestead. BVIC sold the farm in 1921 to Fred and Anna Hagen. The Hagens restored the property to diversified farming, ripped out the orchards and reestablished crops and livestock. They built a milk house and ran a small dairy, raised hogs and were among the first to plant corn in the valley. The farm passed to Hagen's son Harold, in 1940. During the Hagan era, farm acreage shifted to potato production, and the Hagens converted the milk house to a cutting room for french fries. According to refuge staff who knew Harold Hagan, during the mid-20$^{th}$ century the Hagen Farm marketed potatoes to the BirdsEye Corporation for production of shoestring potato snacks.

Most of the land which comprises the refuge was purchased from the Harold Hagan family to preserve the wildlife habitat. The buildings on the refuge today reflect some of the earliest agricultural activities and settlement patterns in the valley. Because the farmstead was functional until government acquisition, it reflects several changes in agricultural eras in the Bitterroot Valley, and historic changes in the landscape that have given shape to the refuge as we know it today.

Descendants of Peter Whaley gathered for a workday in July 2009 to whitewash the new picket fence. Whaley family descendent Bob Whaley told of his father (born 1892) shooting geese off the Homestead porch. Betty Jean Wightman, upon entering the Homestead for the first time ever and taking in the view from the upstairs bedroom that for so long she imagined, summed up the feelings of many who have fallen in love with this historic building …"awesome, what a legacy."

## POTENTIAL INTERPRETIVE DEVELOPMENT PROGRAM

There are a variety of goals and objectives to be considered for interpretation at the Whaley Homestead. These are best defined through a clear process involving public input, educational perspectives and refuge priorities. However, we suggest that a primary goal for the Refuge be to integrate the cultural with the natural in managing and interpreting resources under its jurisdiction. The Refuge does not occupy an isolated wilderness setting, rather it lies in an area altered by human activities for more than a century, that is becoming increasingly urbanized. This factor affects the habitat and impacts all wildlife species that live in and around the Refuge.

Recognition of the Refuge within what the great American philosopher Wendell Berry calls "a landscape of work" offers tremendous opportunities – to identify changes to natural systems over time, to understand the effect of human activities on wildlife and to better guide management, and further protection of wildlife habitat in this sheltered valley.

Since there is no existing interpretive plan or curricular framework for the Refuge, we can only offer ideas that might be developed in the future. The upcoming creation of a Comprehensive Management Plan for the Refuge presents one opportunity to consider many elements of the Whaley story and to begin to define the homestead's role in interpretive planning and long-range preservation at the refuge.

This outline is intended to provide guidance for creation of a culturally-inclusive interpretive plan for the Refuge and the homestead, which centers on wildlife and the natural world through broad themes of human occupation and engagement with the land and its resources. These recommendations encourage re-installing Salish interpretive panels, and designing new wayside signage, reflecting the history and archeology of the cultural landscape. In addition, we suggest establishing a short new trail connecting the homestead to Refuge headquarters and the existing trails system. Interpretive opportunities to impart important information about the Refuge as part of a very old and changing cultural landscape abound: from lifeways of early area peoples, impacts of farming in the valley, and land use patterns still evident today.

At the same time that the homestead site and building holds potential as an educational facility, that could be used creatively as an intimate classroom space, interpretive structure, setting for group activities and much more.

We strongly advise that the Refuge Comprehensive Conservation Plan address the need for a Refuge-wide interpretive plan and curricular materials, and in so doing, integrate programs and information that take advantage of all the Whaley Homestead has to offer the general public. In this framework, it is critical that Refuge staff and management recognize the importance of preserving the Whaley House as a significant cultural resource within a landscape that has undergone a number of land uses (prehistoric, tribal, homesteading, expanded agriculture) and that is now designated for wildlife conservation. Associated interpretive trail, brochures, signage, and educational programs will provide the public with access to the area's natural beauty and rich human history.

**INTERPRETIVE CONTEXT**

The interpretive potential for the Whaley Homestead is strong and the storylines are deep and compelling. The Whaley Homestead represents at heart, the changing relationships between humanity, cultures, wildlife and the land we all inhabit. From this perspective there are many themes represented by the Whaley Homestead that could be portrayed by the Refuge, under the umbrella of the overwhelming appreciation held by the American people for the diversity of wildlife that inhabits public lands.

With its unique association of structures, historic documents, early history and associated landscape, the Whaley Homestead provides a perfect opportunity for broadening public appreciation of historic and current land use issues in Montana, and the impacts on our culture and natural resource heritage.

**POTENTIAL INTERPRETIVE THEMES**

A) The long history of human occupation, and the balance between humans and wildlife in the Bitterroot Valley over time. Long and complex, the changing relationship between people and nature in the valley might be broken into the following:

- Prehistoric uses of natural and wildlife resources in the ancestral homeland of the Bitterroot.
- Non-native settlers and harnessing of natural resources for subsistence.
- Evolution of agriculture toward mass production.
- Creation of Wildlife Refuge in midst of farming and townsite environment (i.e. the Refuge's closest neighbor is a golf course).

B) The agriculturally-based reorganization of nature by humans. The Whaley Homestead reflects a dramatic transition and reordering of the relationship between humans and nature in our region. The homestead and architecture of the house itself physically expresses the history of people who began to more directly cultivate the natural landscape of the valley and harness its natural resources.

Example: The Whaleys and other early settlers shaped the Montana landscape by clearing valleys, harnessing rivers, building and settling. Their hands shaped the landscape we see today, down to the homemade wooden drainage tiles and later terra cotta tiles, used to drain the fields. This has had profound effects on the wildlife in the valley, and shifted the dynamic balance of life and environment that sustains both animals and humans here.

C) Water. How cultural and historic changes have impacted native rivers and waterways, shaping the terrain for wildlife found on the Refuge and its surroundings. Irrigation of the valley, and both active and historic irrigation of the homesteads that formed the refuge open the discussion of the importance of wetland conservation and preservation. This may well be an underlying story for other Refuges also.

D) Human settlement and the impact on wildlife, plants, birds. The natural and cultural history of this region, and environmental impacts of agriculture like the type practiced on the Bitterroot Valley, is directly reflected by wildlife at the refuge today. Montana today is the only state to retain all the wildlife species noted by Lewis & Clark in their journals in 1804-06. How do the activities of humans, and patterns of land use effect other species? Will Montana still be home to all the species we nurture and celebrate on the Refuge today, at the 300th anniversary of the Corps of Discovery?

E) The American Environmental/Conservation Movement. The characteristics and evolution of the American conservationist movement as exemplified by the restoration of native habitats and the relationship between humans and wildlife in the Bitterroot is a balance between the hope to sustain our wild heritage and impact of people who live and work in the valley across time. The mission of this Refuge is an effort on behalf of the greater good, made stronger by connecting with many primary partners: the Teller Refuge, the Lolo Forest, Montana Fish, Wildlife & Parks, neighbors in Stevensville, the Bitterroot Valley Community, and the cultural communities represented by the Montana Preservation Alliance, the Bitterroot Cultural Heritage Trust, the Salish-Kootenai Tribal Historic Preservation Department and Montana State Historic Preservation Office among others.

## POTENTIAL INTERPRETIVE INFRASTRUCTURE

**Restoration and Reuse of the Whaley House** The best way to preserve any heritage property is by actively using it. The homestead and the Refuge would benefit therefore by planning for the reuse of the Whaley House through a planning process separate from the preparation of the CCP. Structural modifications (exterior and interior) and the addition of basic infrastructure (water, power) would need to occur to accommodate any reuse. However, a specific reuse that respects the historic integrity of the property should be identified through a public process before any structural modifications occur.

There is broad, proven public support for the preservation of the house and the reuse of the house as demonstrated by the ongoing rehabilitation of the property, as well as the continued relationship between the Whaley House and the descendents of the original property owners. Reuse possibilities are numerous (including Refuge offices and interpretive/educational space, income-producing public space, rental arrangements with the local Friends group, etc.) and would only serve to broaden the mission and goals of the Refuge.

**Interpretive Signage or Sound Walks** While expensive to produce, interpretive historical signage or sound tours reflecting the above historical themes will increase visitor enjoyment through new appreciation and broader understandings. Given the pedestrian/hiking nature of the Refuge experience, interpretive signage along self-guided trails would be a significant enhancement. Signage with information including maps, photos and stories of the area's past land use could be enhanced through complementary interpretation of historic artifacts, such as the Oliver Plow recovered by the Refuge, household effects currently in on site storage or the other farm implements currently located at the Whaley for greater visitor understanding of the history of local land use. Additional signage could be located at the Whaley House and along a new trail, outlined below. Such information may also be presented on downloadable files for computers or applications for electronic media. See Appendix C for a sample interpretive sign which begins to combine the story of the Refuge landscape with the Whaley homestead.

**Trails** The creation of a new Peter Whaley Trail, a short walking path complemented by interpretive signage along the trail would link the Whaley House with the Refuge's visitor center, a distance of just .25 miles. This would allow visitors to walk the landscape that was once the Whaley homestead and educate visitors that historically, the homestead was comprised of more than today's house, and the Refuge was formerly seven separate family-owned farmsteads. A trail of this type would explain the relationship between the Whaley homestead and the land, describing the 20$^{th}$ century use of irrigation, crops, fence lines and fields. Such a trail could also describe the modification of the land from agricultural to today's Refuge and would complement the Refuge's existing 2.5-mile long trail system.

A new interpretive trail between the visitor center and Whaley could also encourage vehicle parking away from the currently unimproved area along Wildfowl Land by the house and to the visitor center parking lot, where the trail would begin. Chronological signage could be installed along the trail, beginning with descriptions of prehistoric use and occupation near the visitor center and culminating with interpretation related to the historic Whaley House.

**Interpretive Kiosk** Currently, a kiosk greets visitors who enter the Refuge on Wildfowl Lane, at a location approximately 250 yards east of the Whaley House. A second kiosk, designed with sensitivity to the Refuge landscape could be installed near the termination of the Peter Whaley Trail at the home site. The location of the kiosk and appropriate route for an interpretive trail would be subject to survey and environmental evaluation.

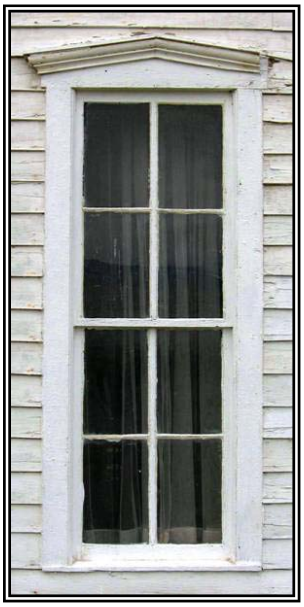
Kiosks, integrated with interpretive trail signage, would serve to broaden educational themes and discussions. Further, employing the Whaley House as a backdrop offers an object lesson and physical context to the information presented at the kiosk. For example, information on the building's historic architecture would enhance an educational message regarding lifeways in this river valley through time or homestead-era building technologies. Overall, the kiosks could present information on the interpretive themes offered above and discussion of the preservationist/ conservationist ethic as reflected by the Whaley House and the Refuge.

## POTENTIAL INTERPRETIVE INFORMATION

The effort to improve interpretive information is driven by several goals, especially expanded visitor awareness, understanding, and appreciation for the Refuge, wildlife and cultural landscape of the region. Another is to help local residents, particularly youth, better understand the heritage of the region, their communities and people who have occupied the Bitterroot Valley through time. Long human occupation of this landscape has indelibly shaped the wildlife patterns of the valley. Recommendations for presenting interpretive information are outlined below and may be offered at the Whaley kiosk.

### BROCHURES

Single-topic informational brochures (in hard copy or available for download) might include:



- The Fertile Land: A look at the native history and natural history of the region, outlining landforms and waterways (the Bitterroot Valley and River) and use by people of many cultures through time.
- Early Cultures: Occupation by Salish, Kootenai and other First Peoples who lived in the valley, patterns of wildlife, early recorded observations by Euro-Americans in 18th and 19th centuries.
- Farmers and Families: Early settlements and the people who tilled the land, starting farming and livestock raising with emphasis on St. Mary's Mission, Big Corral, Ft Owen, Whaley and Hagen Families.
- Heritage Architecture: Elaboration on the built environment of late-19th century homesteads, using the Whaley House, Grube Barn, pastures, fields and shelterbelts to reflect on design & functionality.
- The Changing Land: The local dynamic landscape and its resources over time, from tribal use, to fur trade and agriculture, to apple boom and modern subdivisions, to the conservation movement in America and creation of the Refuge.

### Living History, Educational Programs & Events

The Lee Metcalf Wildlife Refuge already emphasizes education as one of its primary missions. Creating new educational programs regarding the Whaley House and the history of area land use would enhance Refuge goals while opening new avenues for public contact. Local schools and school history programs, museums, and historical societies would all benefit from new, heritage-based interpretation which utilizes the Whaley House as living history. The Refuge, meanwhile, would benefit from enhanced public awareness of its resources.

Creation of the Peter Whaley Trail would offer the perfect setting for interactive education where a guided interpretive program along the trail and culminating at the Whaley House would create a unique and dynamic out-of-the-classroom learning experience that would allow Refuge staff to engage and educate the public on the full range of Refuge land use history. One scenario for the Whaley House would be new life as an education center for the Refuge.

Living history demonstrations involving traditional Tribal land use would be an exciting addition to the Refuge's programs. We suggest consultation with affiliated Tribes regarding Native American environmental practices that may be publicly presented at the Refuge.

## Audience and Partners

The Whaley House is a gracious farmhouse that is highly significant in the history of the Bitterroot Valley. In addition to onsite interpretation, the homestead also has the potential to become part of a historic network through the valley that would encourage public visitation and appreciation and boost the agency mission of wildlife conservation.

Strengthening the facilities and providing more interpretation could benefit local schools, the community, the visiting public and local groups seeking to integrate the role of the refuge into wildlife protection, community conservation and historic preservation efforts. It further presents a real opportunity to the nearby town of Stevensville, which is involved in the "Main Street" and "Preserve America" programs, which are dedicated to building economic and tourism initiatives around the heritage resources of the town and surrounding region.

Potentially, community interest in the homestead might prompt opening of the homestead's inside space. The homestead could accommodate group uses, larger interpretive spaces and diversified interpretive programming. Possibilities are wide-ranging and include special programs, changing or traveling wildlife exhibits, classroom facilities, large gathering spaces and more. By emphasizing bird and wildlife viewing, public enjoyment and public education at the refuge and the homestead, the Refuge's new management plan can link to community interest in enhanced visitor experiences and pathways through the valley. Partnership opportunities to integrate the refuge into local events, plans for parkways, greenways, waterways, pedestrian and cycling paths and other outreach would reinforce the refuge's important role in the valley.

As interpretive themes, signage and wayfinding elements are developed for the valley, the Lee Metcalf National Wildlife Refuge is one of several important local attractions. Many venues are located the length of the valley along Highway 93 South and the East Side Highway corridors. Collaboration holds potential for tourism and arts networks, visitor opportunities, benefits for the local economy and educational opportunities for visitors and local residents.

These potential partners include:

- Local museums: St. Mary's Mission, Bitterroot County
- State Parks: Fort Owen, Traveler's Rest
- Wildlife Refuges: Lee Metcalf NWR, Otto Teller Refuge
- Historic Trails: Lolo, Nez Perce and Lewis & Clark
- State Heritage Property: Daly Mansion
- Historic communities: Stevensville, Corvallis, Hamilton
- Public Lands: US Forest Service Region 1

## ACKNOWLEDGEMENTS

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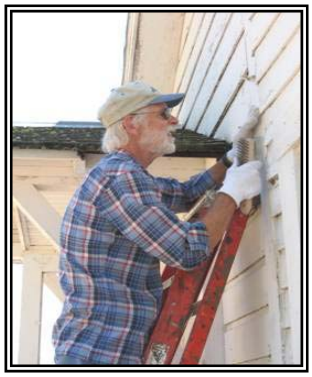
National Fish & Wildlife Foundation & Preserve America
Our Colleagues at the Lee Metcalf National Wildlife Refuge
MPA Staff Coordinators: Jim Jenks, J.C. Harrington, Kate Hampton

*And our many friends:*

A&E Architects
BCE Engineering
Bitterroot Cultural Heritage Trust
Friends of the Metcalf Refuge
J.M. Kaplan Fund
Montana Conservation Corps
Missoula Historic Preservation Office
Montana History Foundation
Montana State Historic Preservation Office
National Trust for Historic Preservation
Ravalli County Bank
Stevensville Main Street Program
Stevensville Museum
Stevensville Preserve America program
US Forest Service Region 1 Heritage Program
The Whaley Family

Cathy Bickenhouser
Lindsey Brassfield
Pete Brown
Bob Danley
Patty Dean
Bob Downing
Deborah Goslin
Brant Grove
Jim Hamilton
Cal Henry
Erin Holmes
Michael Howell
Stacey Hubbel
Peter C. Jennings
Rylee Johnson
Milo McLeod

Bob &Elaine Kennett
Gene Kistler
Peter Kress
Brandt Loflin
Philip Maechling
Kirby Matthew
Jim McDonald
Garen McGrann
Tina Morris
Bruce Murray
Bob Pfutzenreuter
Jim & Carmel Sayre
Pat Shields
Chris Weatherly
Miki Wilde



# Appendix A

United States Department of the Interior
National Park Service

# NATIONAL REGISTER OF HISTORIC PLACES REGISTRATION FORM

## 1. Name of Property

historic name: Whaley Homestead

other name/site number: 24RA385

## 2. Location

street & number: Lee Metcalf Wildlife Refuge

not for publication: n/a
vicinity: X

city/town: Stevensville

state: Montana code: MT county: Ravalli code: 081 zip code: 59870

## 3. Classification

Ownership of Property: Public-Federal

Category of Property: Building

Number of Resources within Property:

| Contributing | Noncontributing | |
|---|---|---|
| 4 | | building(s) |
| 4 | 1 | sites |
| | | structures |
| | | objects |
| 8 | 1 | Total |

Number of contributing resources previously listed in the National Register: 0

Name of related multiple property listing: n/a

4. Certification

As the designated authority under the National Historic Preservation Act of 1986, as amended, I hereby certify that this X nomination ___ request for determination of eligibility meets the documentation standards for registering properties in the National Register of Historic Places and meets the procedural and professional requirements set forth in 36 CFR Part 60. In my opinion, the property X meets ___ does not meet the National Register criteria. ___ See continuation sheet.

Signature of certifying official — Date 11/29/90

Assistant Director - Refuges and Wildlife, U.S. Fish and Wildlife Service
State or Federal agency and bureau

In my opinion, the property X meets ___ does not meet the National Register criteria.
___ See continuation sheet.

Marcelle Sharp — Date 3-8-91
Signature of commenting or other official

MT SHPO
State or Federal agency and bureau

5. National Park Service Certification

I, hereby certify that this property is:

___ entered in the National Register
___ See continuation sheet.

___ determined eligible for the National Register
___ See continuation sheet.

___ determined not eligible for the National Register

___ removed from the National Register

___ other (explain):

Signature of Keeper — Date

## 6. Function or Use

Historic: Domestic: single dwelling
Domestic: multiple dwelling
Agriculture: animal facility

Current: Work in progress

## 7. Description

Architectural Classification: Other: Vernacular

Materials: foundation: stone
walls: weatherboard
roof: shingle

Describe present and historic physical appearance.

The Whaley Homestead is located on what is now the Lee Metcalf Wildlife Refuge near Stevensville, Montana. The homestead is located near the head of Spring Creek in the Bitterroot River floodplain; Spring Creek feeds into the Bitterroot River about 2½ miles to the north. The homestead is defined by a main residence, three outbuildings and five agricultural outbuilding foundations; all except one foundation contribute to an understanding of the historic significance of the property.

The original owner, Peter Whaley, first erected a log house here in 1879. By 1885, Whaley's improvements on the homestead included the large, log-framed house which still stands today on the property. The small log house remained for many years, and was used as a secondary residence until it burned in 1916.

The house Peter Whaley built in 1885 is a two-story, log building covered with pine (and later some larch) weatherboard siding. The frame is composed of square-hewn logs approximately 12" wide, which are dovetailed at the corners and chinked with mortar. The outer surfaces of the log walls exhibit little evidence of weathering, indicating that they must have been covered with siding shortly after initial construction. It rests on a rubble stone foundation without a basement.

The cross-axial plan of the house is symmetrical with four, steeply pitched gables, one emphasized on each elevation. Filling the spaces between each gable, are four single-story ells--two are porches, two are projecting rooms. The gable ends are finished with verge boards with a repeating hand-carved clover motif. On the west elevation, the central gable dominates the front view, framing tall, narrow, pedimented, 4-over-4, double-hung sash windows on the upper and lower floors. Windows of this design characterize the fenestration. A small, off-center pantry window with four fixed panes and a matching pediment disrupts the symmetry on this gable. To either side, the gable is flanked by two open entry porches. The porches presented have simple, square support stanchions at the outer corners, with plain balustrades along the outer sides. However, an engaged column on the northwest porch reveals that the original porch design included chamfered wooden columns with spool-like ornamentation. Shed extensions of the side gable roofs cover these entries.

Entry from the southwest porch is through a west wall doorway into the living room; the wooden door is almost fully lit and the tall, narrow window is outlined by narrow lights. On the northwest porch, a doorway in the north side of the main gable accesses the kitchen; the wooden door has four panels and a transom above it. Windows further out on the walls, off the porch, visually balance these entries.

On the south elevation, the southern gable ends frame an original tall, sash window on the upper level; a second original window is located in the ell at the northeast corner. On the lower level, the current window is a two-pane, horizontally placed unit, with a plain wooden frame and no lintel. Several windows of this kind on the house apparently date to circa 1935, when an incompatible dining room addition was made (recently removed). Some windows replaced the original type of window units, others were apparently cut in to better illuminate the interior. They are not compatible with the original design.

X See Continuation Sheet

On the north elevation, the north gable frames two symmetrically placed, tall, sash windows in the upper story. A later two-pane, horizontal unit is offset on the lower level toward the rear; it lights the master bedroom. A wooden door with a multi-paned storm opens into the kitchen on the northeast ell. This entry is covered by a small, projecting gabled roof. The roof is shingled, and supported by knee braces having a nail head finish on the ends. The stoop has been replaced with concrete.

On the east elevation, the central gable again frames tall, sash windows--on the upper level, a single window, on the lower level, two windows placed symmetrically (one of these is now boarded over). In addition, the lower south window has been boarded up. There is a small, square, fixed-pane window in the southeast ell. The original tall sash window in the northeast ell has been replaced with a horizontal unit, however the original pediment remains, marking the original window placement.

A one-story dining room for the hired hands was added to the east side in 1935. This addition had a flat roof, siding to match the rest of the house, a plain, wooden door with upper glass on the south side, and horizontal windows of the type described above. Its removal has restored the original form and massing of the building.

The house has three brick chimneys. Two of them are on the northeast portion of the house, originating in the kitchen. The third chimney projects above the ridgeline of the south gable, coming from the living room. The roof was covered with wooden shingling originally, this was later replaced with asphalt, rectangular-butt shingling. Work is currently in progress to restore original style wooden shingles on the roof.

The interior is unusually designed, reflecting the log construction. There is no central hallway; rather, all the original rooms on the ground floor, except the front spare bedroom, open into the dining room in the rear (east end) gable. The stairway is in the corner of the dining room as well and leads upstairs into the east bedroom. The east and west gables upstairs contain bedrooms, while the north and south ends are attic space. From the east bedroom, doors on all sides lead into the three other rooms. Oak flooring was added in the living room in 1932.

Three outbuildings are included in this nomination. The cooler/oil house is located by an old gas tank southeast of the house. It was built for meat storage between 1905-1909. This is a simple rectangular building with two gabled ends running east and west, and weatherboard siding. There is a simple wooden door on the east end.

The bunkhouse is located south of the cooler/oil house. This building was erected between 1905-1909, and has been moved around the property over the years. The bunkhouse is a rectangular, wooden building with a gabled roof. The roof has wooden shingles and a brick chimney rising through the ridge on the west end. The siding is of vertical board-and-batten. The doorway is placed centrally on the south side, and has a wooden, one-light panel door. Directly to the left of the door is a small, single-pane window with a simple wooden frame. The east wall window is placed horizontally, 2-by-2, in a simple wooden frame. The building rests on a concrete foundation.

Between the cooler and the bunkhouse, is an "Eleanor Roosevelt" style outhouse, built 1932-1933. On the exterior, it is a conventional outhouse, with a thin narrow frame and weatherboard siding, a simple vertical plank door, and a sloping roof with wooden shingles. On the interior, a concrete toilet is located, with a drawstring which raises and lowers the toilet seat when the door is opened and closed.

To the southwest an irrigation ditch separates the house and outbuilding complex from a group of four deteriorating, ground-level foundations. The foundations consist of crumbling concrete pads which currently are badly cracked by weather. Many weeds which have grown up through them, and in places, the building outlines are difficult to discern.

These four foundations date within the period of significance for this property. They are included within the boundaries of this nominated property because they contribute to an understanding of the historic function and use of the homestead. In addition, the foundations represent the transitions which characterized the agricultural endeavors helping to define the significance for this property. Elsewhere on the property, there is one additional foundation (Foundation E). It is more modern and does not contribute.

Foundation A: The largest foundation, this badly deteriorated pad marks the former location of a large livestock barn. Concrete only remains in the eastern portion of the foundation; weeds have badly cracked the concrete. The barn was set elsewhere on this bench when constructed in 1905-1909 by Forest Plummer and Mary Carroll. It was moved here ca. 1940 by the Hagens. It was a wooden, gable roofed structure with a shed roof overhanging the east side, supported on posts to shelter the animals. It originally was built of 14" to 16" square log timbers, probably a post and beam construction, and had square nails. It was razed by Harold Hagen when the property was sold to the Lee Metcalf Wildlife Refuge during the early 1970s.

Foundation B: This concrete pad is the best preserved in this complex. It marks the site of a milk house constructed in 1933-1934, later converted for french fry cutting. The pad rises 6"-12" above the ground, and is T-shaped. 8" boards were placed on the pad when wet, to frame the walls. Several of these boards and impressions made in the concrete marking their position are extant. A trough runs full length across the building. The building was moved east of the Eastside Highway when the land was sold to the Lee Metcalf Wildlife Refuge.

Foundation C: This is a rectangular, deteriorated concrete pad, marking the location of a loafing shed constructed ca. 1940. Formerly, the area had been a cattle run between the corrals and the milk house. The loafing shed consisted of a series of posts set in concrete, supporting a roof. Concrete remains only in the western half of the foundation.

Foundation D: This large foundation is denoted by a packed earth depression which underlies Foundations B and C. Apparently pre-dating these structures, its dimensions suggest it was the original location of the livestock barn represented by Foundation A.

Foundation E: This small, rectangular concrete foundation probably dates to the late 1940s or 1950s and represents the location of a hen house. It is located north of the irrigation ditch, near the dirt driveway behind the house. Badly overgrown and disrupted by weeds, this foundation does not contribute to the historic significance of the Whaley Homestead.

Peter Whaley's house, and the associated outbuildings and agricultural foundations, are set on the edge of the Bitterroot River floodplain. The river cuts through approximately a mile to the west, and the open bottomland is characterized by marshy areas and rivulets. South, east and north of the house lie fields formerly cultivated by occupants of this homestead. Today most of the original homestead acreage is managed as open wildland for the Lee Metcalf Wildlife Refuge.

The house and outbuildings retain an excellent level of historic integrity. The historic fabric is largely undisturbed, and much of the original detailing remains. The log understructure, with the weatherboard cladding, pedimented fenestration,

and hand carved verge boards reflect accurately the original design and character of this transitional vernacular building. Additionally, the house is in the process of rehabilitation to restore those elements of the design which have been altered (the dining room addition was removed, the roof is being reshingled with wood) and to preserve it. With the outbuildings, the agricultural building foundations and the surrounding rural setting, the complex strongly conveys its historic agricultural homestead associations.

## 8. Statement of Significance

Certifying official has considered the significance of this property in relation to other properties: Statewide, Locally

| | |
|---|---|
| Applicable National Register Criteria: A, C | Areas of Significance: Architecture<br>Agriculture<br>Exploration/Settlement |
| Criteria Considerations (Exceptions): n/a | Period(s) of Significance: ca. 1885-1941 |
| Significant Person(s): n/a | Significant Dates: ca. 1885, 1905, 1909, 1921 |
| Cultural Affiliation: n/a | Architect/Builder: Whaley, Peter |

State significance of property, and justify criteria, criteria considerations, and areas and periods of significance noted above.

The Whaley Homestead, as an early Montana homestead associated with the beginnings and evolution of agricultural development in Western Montana and the Bitterroot Valley, and for its unique qualities of vernacular frontier architecture, is eligible for listing on the National Register of Historic Places.

The Whaley Homestead was settled in 1877 by Peter Whaley, an Irish immigrant whose family came to the United States in 1841. In 1849, the California gold rush brought him westward. In 1859, Peter Whaley married Hannah E. Whitehead. During the years that followed, Peter Whaley alternated between mercantile activities in the Mid-West, and mining in the West. His wife accompanied him on these ventures, and the Whaleys had a total of eight children across the West during the years that ensued. Gold strikes in Montana eventually brought the Whaleys to Bannack in 1863 and Alder Gulch in 1864, where Peter Whaley fared successfully. From there, the family moved to Diamond City in 1866; Peter Whaley dealt supplies to the miners for eight years until the camp played out. From there, Whaley went to the old Jocko Indian agency, where he served as the Agent on the Flathead Indian Agency in Montana from April 1874 to April 1875. In 1875, the Peter Whaley family moved to Hell Gate, and then to the Bitterroot Valley near Florence.

In 1877, Peter Whaley moved his family once more, upon filing a desert land claim for this property where he built a small log cabin. The railroad challenged the claim, and for two years Whaley lived on a nearby tract of land, while continuing to cultivate this property. In 1879, Whaley prevailed in his claim, and he "removed [his] House on it". By 1885, Whaley's homestead proof record cites a major improvement on the property--the substantial house which stands yet today: an eight-room log house, 32' x 48' in dimension. Exterior embellishment appears to have been added by this time. The property was also fenced, and contained a granary, a roothouse and a water ditch.

David and Julia Whaley, Peter's children, filed homestead claims on adjoining acreage. David claimed an adjoining 160 acres in 1879, Julia filed claim to 80 more acres in 1883. Between the three of them, the Whaleys owned over 400 contiguous acres in section 11 (see map). Each made the required improvements - a dwelling and cultivation of the land - although only the Peter Whaley house remains today.

The Bitterroot Valley was the traditional heart of Flathead Indian territory. Indian removal from the Bitterroot Valley began with the Hellgate Treaty of 1855. At Hellgate, to pave the way for railroads and future settlement, the Flatheads and other tribes of western Montana were convinced to surrender 23,000 square miles of traditional lands in southwestern Montana. The Flatheads received in exchange, a 2,000 square mile reservation in the Jocko Valley to the north. However, tribal leaders resisted and a clause was inserted--allowing the Flatheads to remain in the Bitterroot until the U.S. President determined that the Jocko Valley was a more desirable home for the tribe than the Bitterroot.

During the 1860s, prospectors and other white settlers began to flood into Montana. The Whaleys were among a growing number of settlers who were drawn to the Bitterroot Valley. It was not mining but agriculture which drew farmers into the area. Although Montana's harsh conditions make farming here a tough prospect, rich soil and the moderating climate found west of the Great Divide make the Bitterroot one of the more hospitable agricultural valleys in Montana.

X See Continuation Sheet

Although the Flatheads had established peaceful relations during the 1840s and 1850s with white traders and missionaries, this influx of white settlers disrupted that balance. The settlers raised the cry that the Indians be removed, and by 1871, relations between the cultures were strained. The Grant administration ordered the Flatheads to the Jocko reservation and sent James A. Garfield to negotiate their removal.

While Flathead Chiefs Arlee and Adolph agreed to go, Chief Charlo refused to move his people north. Charlo, the leader of the largest band of Flatheads, resisted signing the 1872 Removal Act and maintained bitterly that the Government had reneged on the 1855 treaty. Charlo and the great majority of the Flatheads remained peacefully in the valley, in increasingly abject conditions, as their hunting and gathering ranges diminished. In 1891, yielding to tremendous pressure, Charlo led his people to the Jocko reservation, vowing "never to look back, and never to return" to his old homeland.

It was against this historical backdrop that the Whaley family and others moved into the Bitterroot Valley. It is perhaps not coincidental, that at the height of the Flathead removal drama, Peter Whaley laid claim to a sizeable chunk of prime agricultural land in the Bitterroot Valley, two short years after leaving his Agency position. At the least, the settlement of this homestead reflected the transitory history of the Bitterroot Valley during the latter half of the 19th century, as native people were forced from traditional hunting and gathering ranges, and white farmers and ranchers divided and fenced the land, cultivated virgin soils, and developed intensive agricultural systems.

The first seeds of agriculture were planted in the Bitterroot Valley in 1841, at St. Mary's Mission in Stevensville. By 1844, a crop of grains and vegetables, and livestock were successfully raised. While the Indians were inexperienced farmers, they were accomplished horsemen, and soon developed a brisk livestock trade with travellers on the emigrant road to the south, using white traders as intermediaries.

Meanwhile, the agricultural potential of the valley was noted by early white settlers to the area. After the Original Homestead Act of 1862 was passed, Montana's earliest claims were staked in the western valleys of the state. During the 1860s, farmers from the Bitterroot plied a lively trade in potatoes and other staples at the mining camps of Bannack and Virginia City. The Whaley homestead claims and others made under the Desert Land Act of 1877, reflected an expansion of this early wave of homesteading.

The Whaleys were reportedly not exceptional farmers, in fact, most farms in the Bitterroot turned out to be marginal. Supplementing the farming income, the Whaleys raised livestock and operated a meat market in Stevensville. And much of their livelihood was derived from a sawmill operation in Florence, and the Stevensville Hotel. In 1905, the Whaleys sold their land; Peter Whaley died in 1912.

The new owners, Forest Plummer and Mary Carroll, erected several new buildings on the property, including a large horse barn. Plummer was a friend of Montana Copper King Marcus Daly. Daly sparked interest in the Bitterroot in 1887 by consolidating several smaller properties into a 28,000 acre farm, raising hay, grain and fruit in fields irrigated from the river. In the tradition of the Flatheads who fared so successfully with livestock here during the 1860s, he also bred horses. Daly, prior to his death in 1901, may well have encouraged Plummer to raise horses. However, just four years later, in 1909, Plummer and Carroll sold out to the Bitterroot Valley Irrigation Company.

The founding of the Bitterroot Valley Irrigation Company, in 1905-1906, opened a significant chapter in the valley's history. The BVIC was one of many land speculation companies that developed and sold Montana properties to eager farmers during the first decade of the 1900s. The company constructed a dam at Lake Como and an irrigation ditch

to water benchlands from Hamilton to Stevensville, and they divided large properties into 5 and 10 acre orchard tracts. The upper fields on the Whaley Homestead were planted with Mackintosh apple trees and gooseberry bushes for nursery stock during this era, along with seed crops of radishes and sweet peas.

The orchard boom in Ravalli County was dramatic--between 1910 and 1920, the number of apple trees rose from 355,789 to 725,720. However, many unwitting farmers planted strains of apples, cherries and other fruits unsuited to the Montana climate. In the Bitterroot, many farms soon failed and were abandoned. By 1925, the number of apple trees had dropped to 510,055.

During this period, the BVIC was forced out of business, and J.W. McKinnon, who was tangentially involved with the BVIC, sold the Whaley Homestead in 1921 to Fred and Anna Hagen. The Hagens returned the property to a self-sufficient small farm, ripping out the orchard plantings and restoring the production to crops and dairy farming, similar to the original homestead activities. During the 1920s, a cannery was established in Stevensville, and the Hagens were among the first to raise corn in the valley. For a period they raised hogs. They also ran a small dairy, producing 200 gallons of milk per day in 1926. In 1933-34, the Hagens built a new milk house; in later years, they grew potatoes and converted the building for cutting french fries.

In 1932-33, a government subsidized outhouse was installed. It is noted here as representative of the WPA project headed by Eleanor Roosevelt, attempting to improve conditions in rural areas by providing these sanitary toilets to low income rural households.

In 1940, Harold Hagen took over the operation of the homestead from his father. All told, Hagens remained on the land for over 60 years. During the late 1960s and early 1970s, they sold off parcels to the Ravalli National Wildlife Refuge, now the Lee Metcalf Wildlife Refuge. The final parcel, including the house, was relinquished in 1974. Harold Hagen retained life use; he lived there until 1988.

The Peter Whaley house on the Whaley Homestead represents an outstanding example of late 19th century vernacular frontier architecture in Montana. Hand carved verge boards, clapboard siding and embellished doorways and windows, all laid over massive log framing, reflect one settler's attempt to erect a stylish home through resourceful adaptation of the limited materials and crude techniques available on the frontier. In addition, the unusual interior arrangement is a distinctive reflection of the log framing technique used in the house. On both the exterior and interior, the house retains an excellent degree of integrity. Removal of the ca. 1935 dining room and reshingling of the roof have reversed the most glaring impacts to the house's integrity. Otherwise, losses of historic fabric have been minimal and are basically limited to replacement of a couple of windows and the original porch detailing.

In addition, the current pristine quality of this rural setting, and the remaining outbuildings and old foundations on the homestead, strongly suggest the agrarian origins of the Whaley Homestead, and the century of agricultural history which has unfolded in the Bitterroot Valley.

Homestead claim files, patent issued to Peter Whaley, Homestead certificate #770, application #1985, May 19, 1887, signed by Grover Cleveland. Recorded Vol. 2, p. 195. Size/location: 160 acres, SE4 of Sec. 11, T9N, R20W.

Homestead claim files, patent issued to David J. Whaley, Homestead certificate # 759, application #2451, May 19, 1887, signed by Grover Cleveland. Recorded Vol. 2, p. 192. Size/location: 160 acres, E2 of SW4 & S2 of NW4 of Sec. 11, T9N, R20W.

Homestead claim files, Julia Whaley, Declaratory statement # 361, Bitterroot, December 1, 1882. Size/location: 80 acres, W2, SW4, Sec. 11, T9N, R20W.

Land Ownership Records, Ravalli County, May 19, 1887-July 9, 1940.

Miller, Joaquin, Illustrated History of the State of Montana, Biography of Peter Whaley, Chicago: The Lewis Publishing Co., 1894: p. 577-579.

Northwest Tribune, July 23, 1947, David J. Whaley, Obituary.

Polk City Directories, Missoula & Ravalli County, 1890, 1903, 1905, 1907, 1909, 1911, 1913, 1915, 1917.

Ravalli Republic, Hannah Whaley, obituary, May 5, 1919.

Ibid., Mathew L. Whaley, Sr., obituary, November 3, 1964.

Report of the Board of Indian Commissioners, Letter of Peter Whaley, Indian Agent, Flathead Agency, Montana, September 19, 1874.

Tillman, Albert C., "The Whaley Family," unpublished manuscript, 1956, Bitterroot Valley Pioneer Society Papers, SC1053, folder 11/box 13, Montana Historical Society archives, Helena, Montana.

United States Bureau of Census, Agricultural Census Statistics for 1910, 1920, 1925, 1930.

Western News, Peter A. Whaley, obituary, June 21, 1912.

Ibid., Mathew L. Whaley, Sr., obituary, November 11, 1964.

Whaley, Mathew, Memoirs as told to Doris Whaley, True West Magazine, January-February 1968.

## 9. References


Baker, Ruth, Synopsis of historical accounts featuring Peter Whaley and family, Montana Genesis, Stevensville Historical Society, Mountain Press Pub. Co., Missoula, Montana, 1971.

Cappious, Samuel Lloyd, "A History of the Bitter Root Valley to 1914," M.A. Thesis, University of Washington, 1939.

Hagen, Harold, Homestead resident, 1921-1988. Personal Communication with Maggie Anderson, Lee Metcalf Wildlife Refuge Manager, several meetings summer and fall, 1990.


X See Continuation Sheet

Previous documentation on file (NPS):

___ preliminary determination of individual listing (36 CFR 67) has been requested.
___ previously listed in the National Register
___ previously determined eligible by the National Register
___ designated a National Historic Landmark
___ recorded by Historic American Buildings Survey # _____
___ recorded by Historic American Engineering Record # _____

Primary Location of Additional Data:

X State historic preservation office
___ Other state agency
___ Federal agency
___ Local government
___ University
___ Other -- Specify Repository:

## 10. Geographical Data

Acreage of Property: Approximately 4 acres

UTM References:

| | Zone | Easting | Northing |
|---|---|---|---|
| A | 11 | 724040 | 5159220 |
| B | 11 | 724060 | 5159120 |
| C | 11 | 724140 | 5159120 |
| D | 11 | 724140 | 5159300 |

Verbal Boundary Description:

The Whaley Homestead is located in the W½ of the NW¼ of the SE¼ and in the E½ of the NE¼ of the SW¼ of Section 11, T9N, R20W. The boundary of the property is shown as the colored line on the accompanying map entitled "Whaley Homestead Bdy."

X See Continuation Sheet

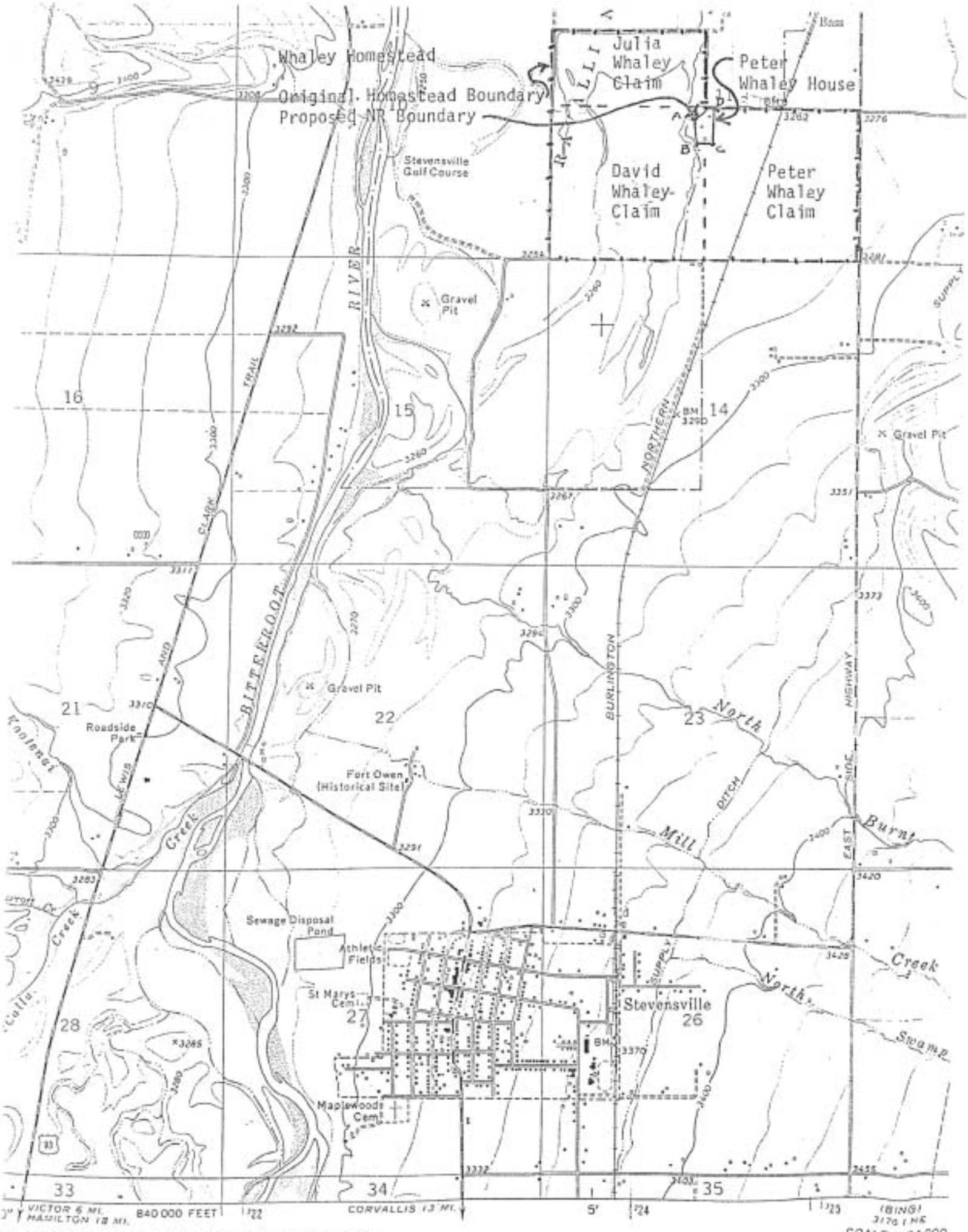
Boundary Justification:

The property to be nominated comprises a portion of the original Whaley Homestead encompassing the Peter Whaley house and associated outbuildings, and the site of former outbuildings associated with the house through various periods of ownership and agricultural endeavors. The boundaries, therefore, encompass the house and fenced yard, and the adjacent river bench with the outbuilding foundations.

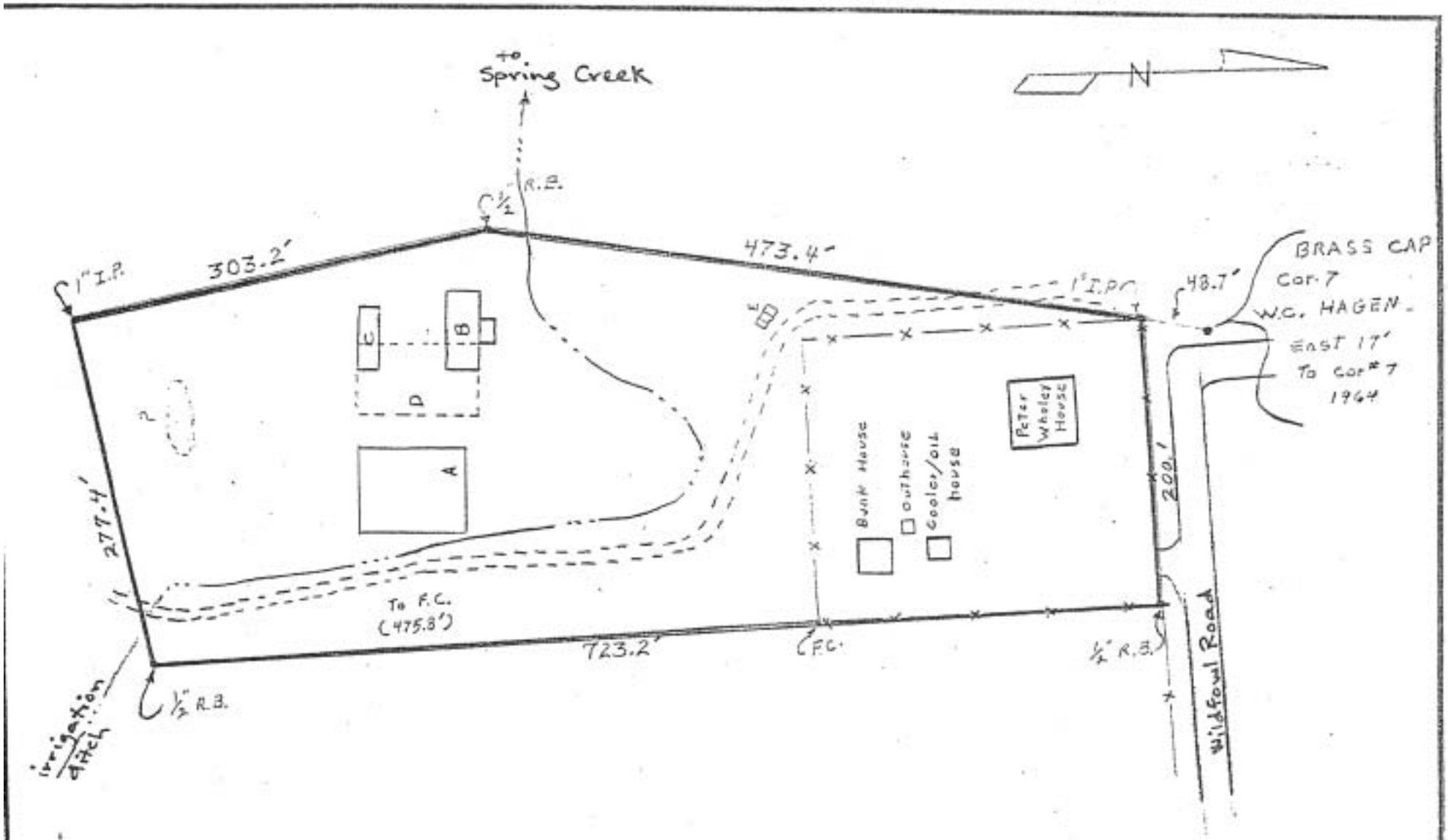
## 11. Form Prepared By


Name/Title: Chere Jiusto and Nathan Latta
Organization: State Historic Preservation Office Date: November 1990
Street & Number: 225 N. Roberts Telephone: 406/444-7715
City or Town: Helena State: Montana Zip: 59620

The corners of the property to be nominated have been marked with survey pins, and the verbal boundary description for the property is as follows: From the brass cap marking the centerpoint of Section 11--Cor. 7, Witness Corner Hagen, 1964--near the bend in Wildfowl Road, measure 48.7 feet south to the northwest corner of the fenceline which encloses the Peter Whaley house and outbuildings complex. This corner marks the point of beginning. From this point, proceed east 200.0 feet to the north-south running fenceline which encloses the house and outbuildings complex. Proceed south along this fenceline and beyond a total of 723.2 feet, paralleling the Whaley driveway to its juncture with the irrigation ditch. From here proceed 277.4 feet west-southwest to the survey pin marking the property's southwest corner. From here proceed north 303.2 feet to the survey pin located just south of the irrigation ditch. From here, return to the point of beginning by proceeding north-northeast 473.4 feet.

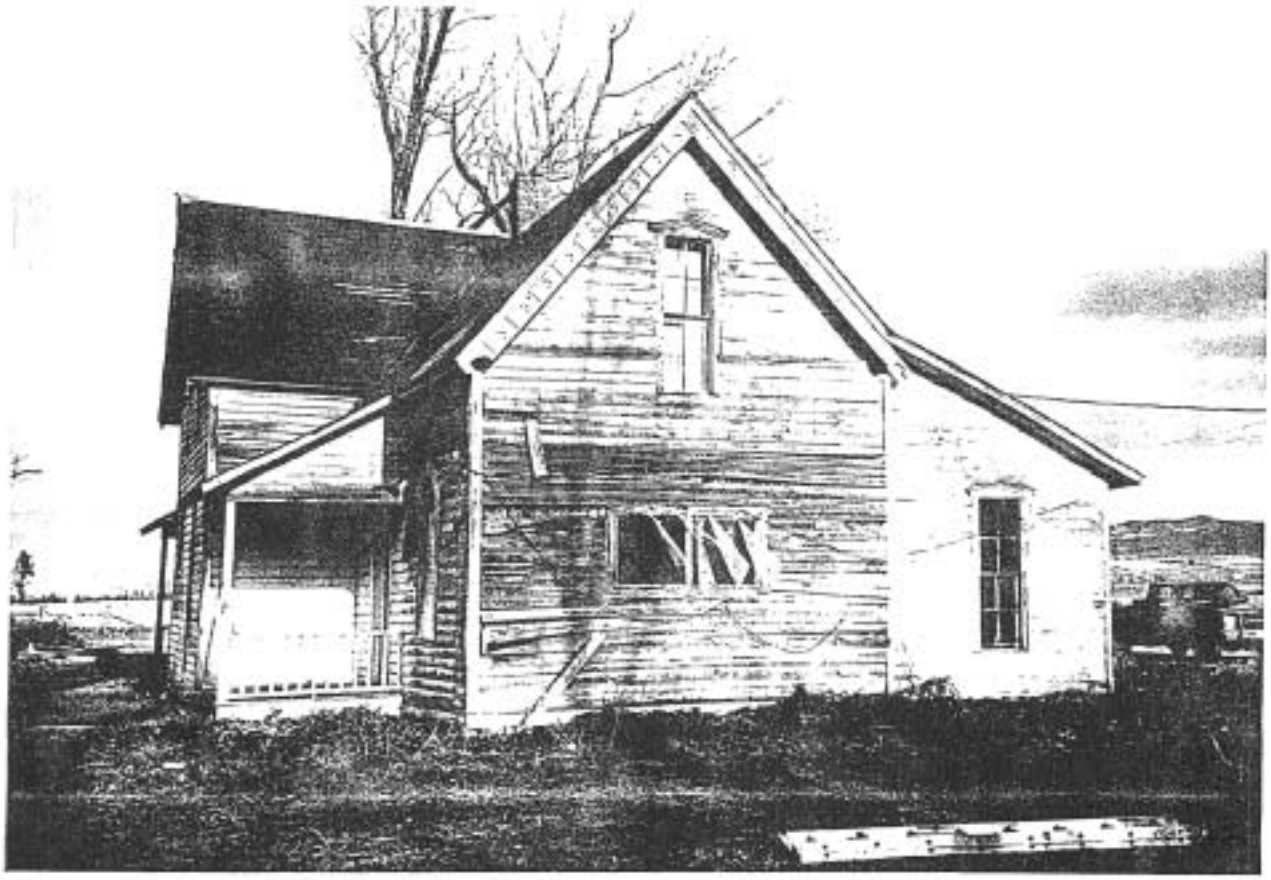



ped, edited, and published by the Geological Survey

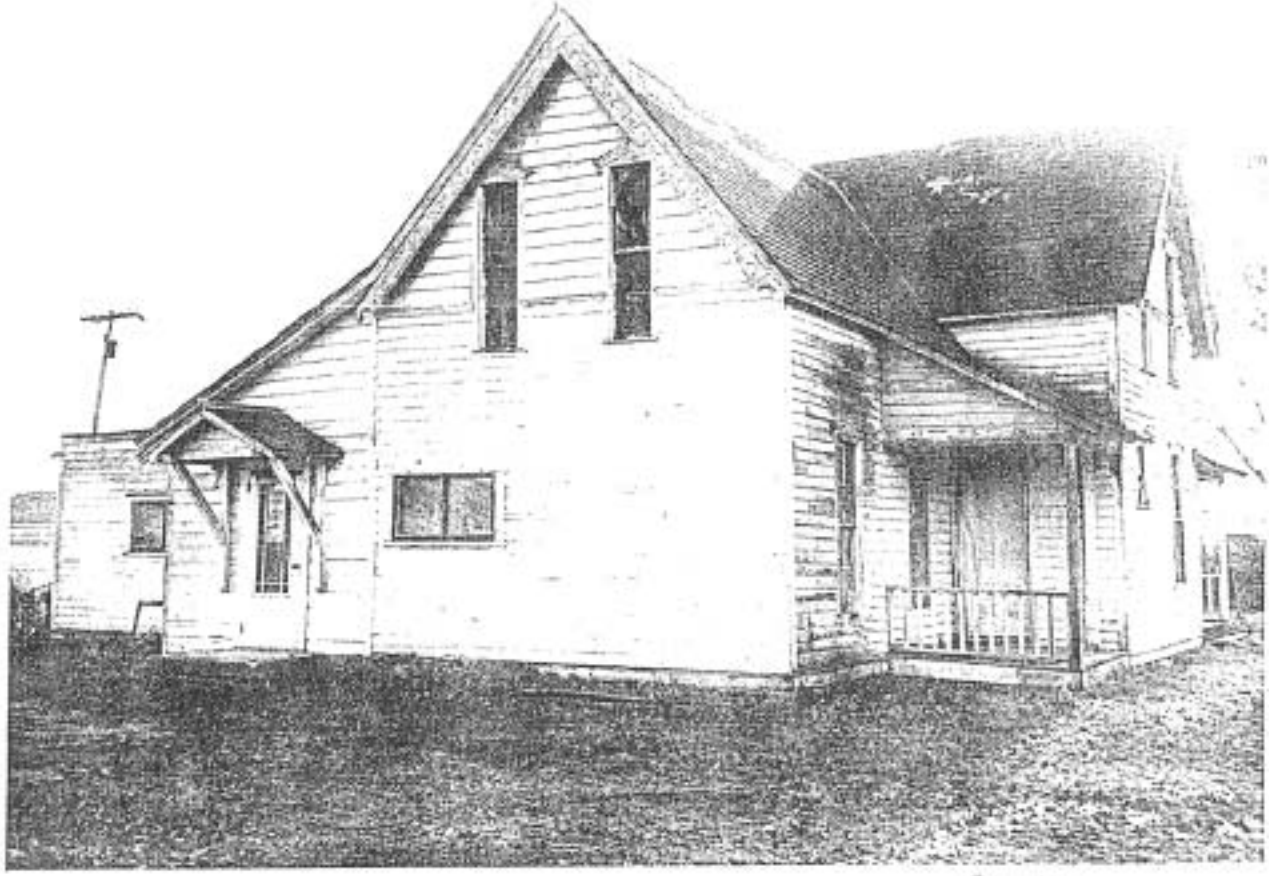



| REVISIONS | | | LEE METCALF N.W.R. | | |
|---|---|---|---|---|---|
| NO. | DATE | BY | WHALEY HOMESTEAD BDY. | | |
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | DRAWN BY C.J.H. | SCALE 1" = 100' | MATERIAL |
| 4 | | | CHK'D | DATE 3/1/91 | DRAWING NO. |
| 5 | | | TRACED | APP'D | |

Wesley Hawkins Jan 1970 West

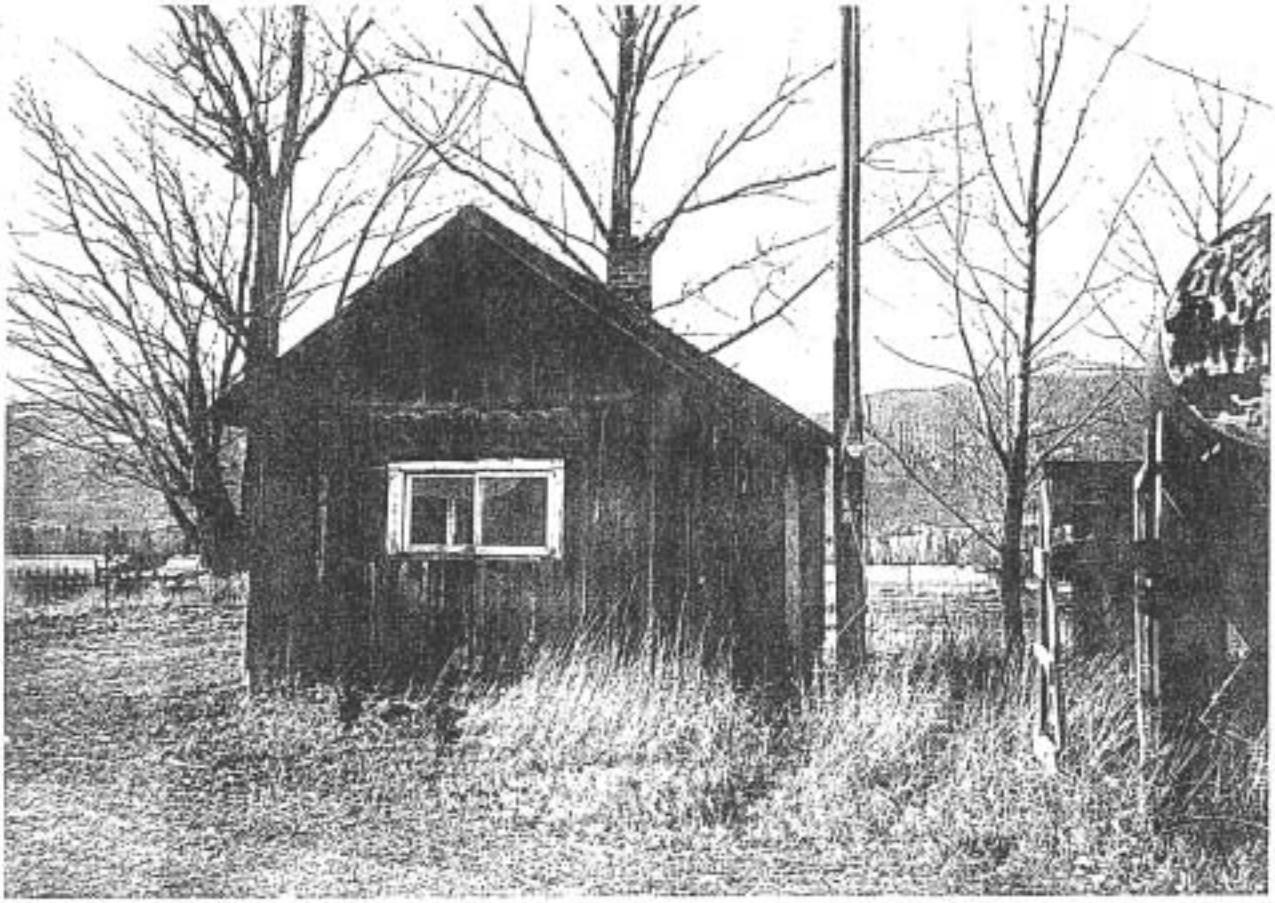


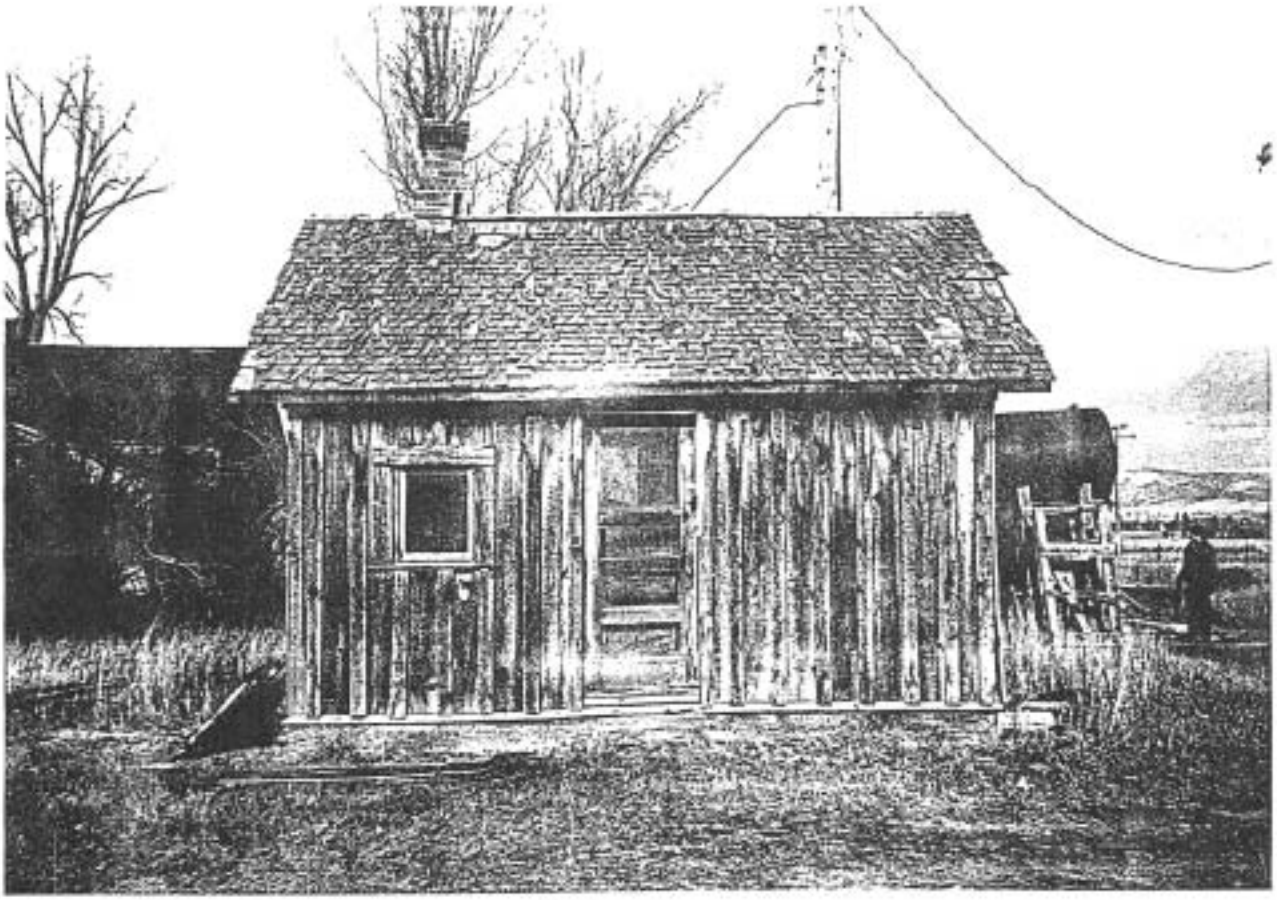
Lewis

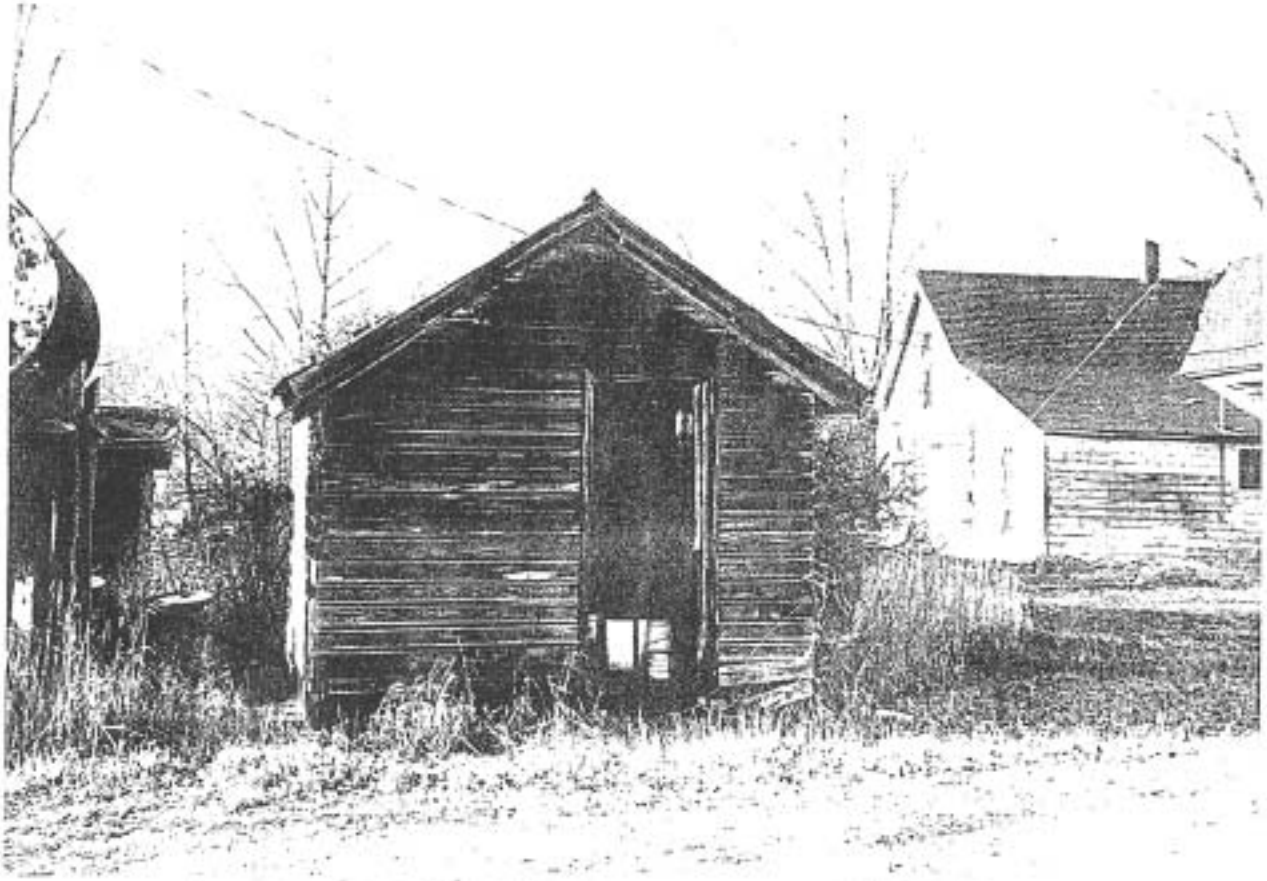


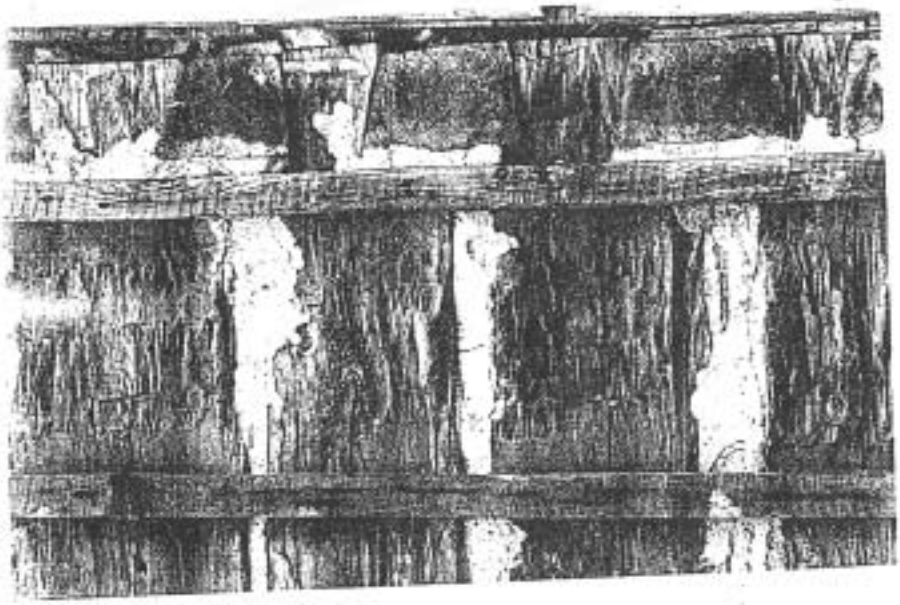
North

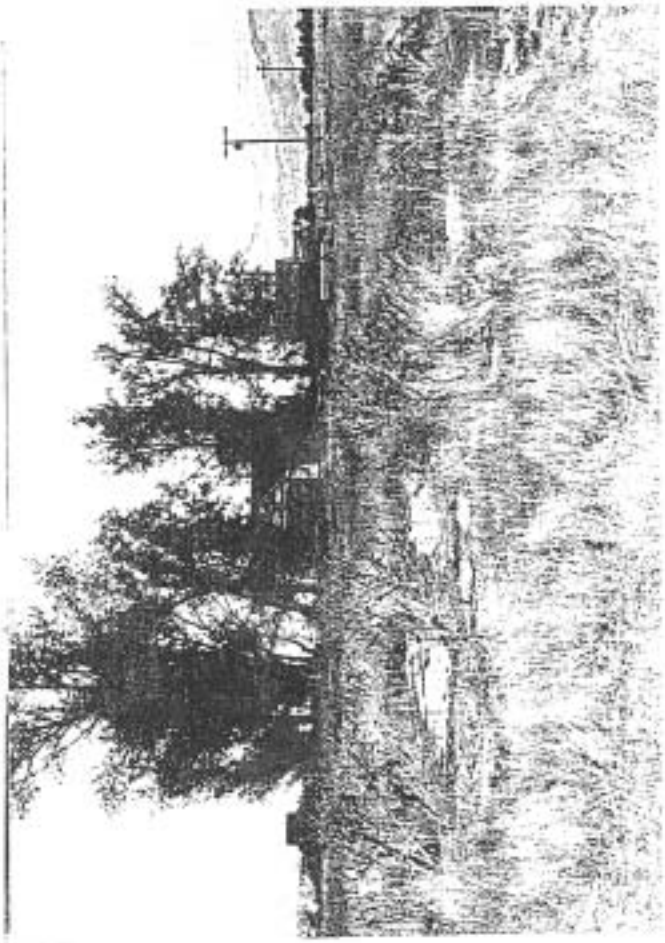
East

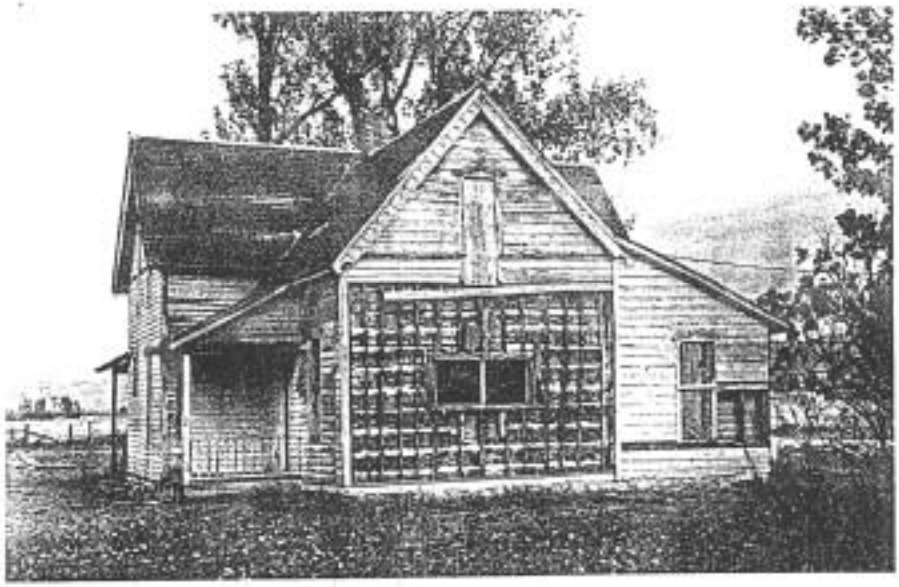


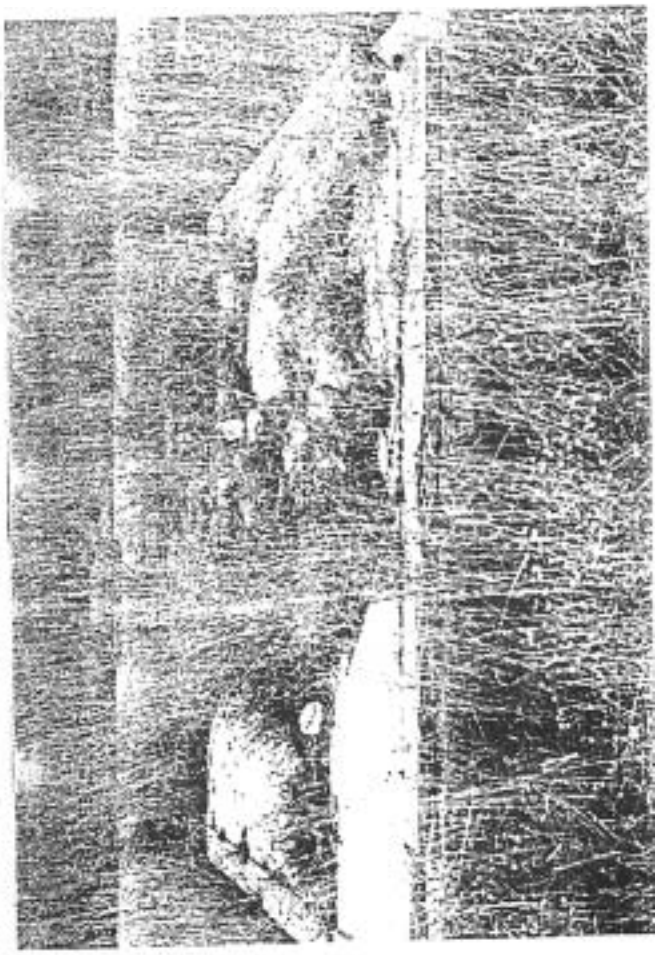












# Appendix B

**Whaley Homestead Condition Assessment/Recommendations**

**Lee Metcalf National Wildlife Refuge**

## Introduction

The Whaley Homestead was inspected on the 28th of March, 2008 by Jim McDonald, Principal and Historical Architect with A&E Architects of Missoula. The purpose of this evaluation was to assess the existing condition of the Whaley Homestead and come up with scope of work to protect the historical and architectural integrity of the character defining features of the building. The Montana Preservation Alliance then completed some of the suggested work through the Preserve America Grant in partnership with the Lee Metcalf National Wildlife Refuge.

## Preservation Scope of Work

## Completed 2008-2009

1. Assess historic architectural and structural status of building and contents.

2. Research the Homestead to determine the changes that have been made to the building over the years. It appears from the building that the lap siding was a later add on and that drop-lap siding would be more appropriate to the restoration of the building. Historic photos would help in making this determination as well as the appropriate doors and windows, especially on the north and east sides of the building.

3. Clean out interior, secure archival materials and artifacts on site.

4. Restore two porches on the west side of the building through removal of the weathered wood floor, replacement with tongue in groove and painted, and scraping and painting the woodwork and trim surrounding the porch.

5. Restore all of the sash windows, entailing removal of the sash, removal of glazing, stripping paint down to bear wood, and repair or replacement of rotted or broken sashes. The windows were re-glazed with existing glass and glazing putty, primed and then received two coats of paint.

6. Construct new fencing and improve security by moving access to locked gate.

7. An informal paint analysis was completed on the various wood elements to determine appropriate colors.

**Preservation Work**

Foundation

1. Stone foundation piers require repair and a central pier to stabilize the building, according to structural engineering assessment. This will adequately support the building and prevent further deterioration of roof and structure.

Roof

2. Wood shingle roof needs repair to keep water out and prevent more damage. A structural engineer has determined there are two areas that are failing because of structural problems in the roof. The main problem appears to be in the shed roof on the southeast corner. The rafters do not appear to be supporting the roof and the board sheathing is buckling causing wood shingles to push up especially in the south eave line. Some of the rafters, sheathing, and wood shingles will need replacement. Wood shingles on the rest of the building should be cut back to the eave line to match the layers of shingles. Do not apply a preservation treatment to new shingles as they should weather appropriately. Linseed oil used on the existing shingles was very heavy causing mold that holds moisture in the shingles and does not let them dry out properly. Wood shingles are cupping in several areas especially on the south and west sides of the building. The roof will need total replacement in the next ten years, following foundation repairs, and should be replaced in-kind with a proper installation.

3. Brick chimneys need to be pointed with an appropriate mortar mix. The chimneys (since they are no longer used, and will probably not be used without a lined flue in the future) should be sealed with a metal cap on top to protect the chimney and other adjacent surfaces within the building.

4. Rotted crown moulding and eave details should be replaced in-kind and all surfaces scraped, primed and painted to protect the eave details. The rafter tips should also be assessed to make sure that they are not rotted and in need of replacement.

5. All flashing and metal ridge caps should be assessed to make sure that they are not loose or properly repelling the water from the roof. Step flashing at the intersection of the roof to the walls and at the chimneys are the vulnerable areas.

6. The bargeboard in the gable ends also needs to scraped down and painted with broken or rotted areas replaced in-kind.

Exterior Wall Surfaces

7. All of the wood siding, especially the later addition of the lap siding needs to be scraped to remove loose paint and feather in the paint that still adheres. Cracked or rotted siding needs to be removed and replaced in-kind. All of the bare wood areas need to be primed and the whole building finished with two coats of paint. The prep work is important to make sure that the new paint will adhere.

8. The rotted skirtboard and drip edge needs to be replaced in-kind around the base of the building. There is very little of the skirtboard that can be saved because of the high grade around the building and lack of positive drainage which has caused most of the material to rot.

   Note: All of this work on the exterior walls should be accomplished even though the research would show that the siding should be a drop-lap siding. Eventually in the total restoration of the building the siding will possibly need to be replaced to be appropriate. If this can not be accomplished at this time then the existing siding will have to be protected. However the cost of repair, replacement, and painting of the exterior may cost more than replacement of the siding if it is found to be appropriate.

Windows

9. All of the sills, jambs and head and trim should be scraped down and repainted. This will require some of the pieces to be replaced in-kind especially the triangular pediment and sills that have missing pieces or have weathered to the point that they will not hold paint.

10. Plywood coverings should be removed as they hold moisture against the building.

11. The two sliding windows should be assess as to whether or not they should be removed and infilled, especially the window on the east side which originally was a double-hung window matching the others.

12. Appropriate hardware should be installed to match in-kind the original and to help secure the building.

Doors

13. All doors need to be scraped and painted similar to the window.

14. All hardware should be repaired and replaced in-kind where necessary. A deadbolt should be added to the access door and eliminate the hasp and lock.

15. The north door should have the glass replaced. Some research should be completed though to determine if the door is original or if it needs to be a paneled door similar to the doors on the west side.

Porches

16. A concrete stoop should be added to the north door to access the building.

Site

17. Provide positive drainage away from all sides of the building. A swale was built out around 20 feet from the building but the area between the building and the swale needs to grade away from the foundation. As part of any regrading, the wire mesh below the sod to create a barrier for the gophers should be run up to the building foundation.

18. Prune trees to cut out the deadwood, and assess to determine their life expectancy. Replant with cuttings from historic stock.

19. A master plan should be prepared for the use of the site that will take into consideration the cultural landscape but still allow for the site to be used. Some of the considerations would be for trails and interpretation so people can enjoy the site.

**Long-Term Recommendations**

1. Prepare an Historic Structures Report with a Cultural Resource Study. As part of the Refuge Comprehensive Conservation Plan, an HSR would address potential uses for the Homestead. The building could be actively programmed to help meet refuge goals and active use would help to protect the homestead. An HSR should also address restoration of the interior including mechanical, electrical, fire and security intrusion detection to protect the structure. It is hard to make informed recommendations for the interior or these systems until a use is determined.

2. A maintenance plan with a budget would help to minimize future problems.

bce STRUCTURAL | BEAUDETTE CONSULTING ENGINEERS, INC.

www.bceweb.com

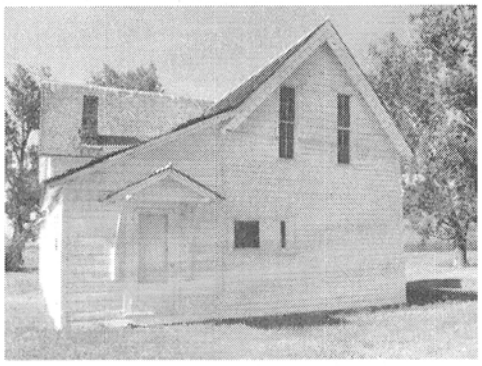
131 WEST MAIN ST.
MISSOULA, MT 59802
TEL: 406.721.7315
FAX: 406.542.8955

450 CORP. DR., #112
KALISPELL, MT 59901
TEL: 406.752.5675
FAX: 406.752.5677

416 NORTH 7TH AVE.
BOZEMAN, MT 59715
TEL: 406.556.8800
FAX: 406.556.8808

201 MAIN ST., #103
RAPID CITY, SD 57701
TEL: 605.791.3090
FAX: 605.791.3092

STRUCTURAL SYNOPSIS - 6/4/09
WHALEY HOMESTEAD
LEE METCALF WILDLIFE REFUGE
STEVENSVILLE, MT.



Introduction:
Janna Moser, PE and Tom Beaudette, PE of Beaudette Consulting Engineers completed a structural assessment inspection on July 3, 2008. Inspection addressed existing conditions assessment of foundations, floors, walls and roof where visible. Limited destructive investigation completed. No subsequent analysis completed.

Foundation:
Isolated stone piers on stone footings around perimeter. Interior support is timber blocking and cribbing on crawl space dirt. Crawl space has limited clearance. Perimeter has combination of filler stone between piers and wood skirt board. Sill wall timber spans from pier to pier. The building pier foundation has experienced differential settlement through the years. Stone piers are in poor condition. Interior wood support on dirt needs replacement. **Recommend** replacement of existing foundation with new isolated concrete footings and piers, exterior and interior. Exterior piers can be veneered with existing stones to match original. Skirting can be stone, wood or lattice. Deepen crawl space for adequate clearance.

Walls:
Walls are stacked hand hewn timbers with assumed saddle notched corners. Walls have been finished on exterior with lap siding. Timber walls deemed to be more than adequate for structure gravity and lateral requirements of the Stevensville area.

Floors:
Floors have rough sawn 2x8.s at 16" o/c spanning from perimeter timber walls to interior timber walls. Floor joist deemed adequate to remain. Floor planking deemed adequate to remain, but replace deteriorated where required. **Recommend** upgrade of joist to sill timber connections with supplemental toe screws each side.

Roof:
Roof has crossing 12:12 pitched roofs with 5:12 shed roof extensions on the east side. The west side has two 5:12 shed roof porches. The main 12:12 roof has 1x12 skip sheeting on 2x4 rafters @ 24" o/c bearing directly on the timber wall stack. The rafters have a 2x4 collar tie which originally formed the ceiling of the upper level rooms. The shed roofs have 2x4 rafters @ 24" o/c spanning from the timber wall stack to an intermediate 2x4 framed bearing wall, then to the east side timber wall.

The intermediate knee wall bears on 2x4 ceiling joist which span from timber wall to wall. The 12:12 roof structure is adequate subject to upgrade of all connections. The shed roof structure is not adequate. **Recommend** upgrade of all rafter to wall connections with supplemental blocking and nailing. Upgrade collar tie to rafter connection with additional nailing. Replace random 1x collar ties with 2x6's. **Recommend** new "sistered" 2x6's to existing ceiling joist at shed roof areas. Inspect all existing rafters for deterioration, but no extensive rafter deterioration noted. Barge rafters need to be replaced and overhangs upgraded. **Install** new 5/8" OSB sheathing over existing 1x skip sheeting on roof. Specific details required for connections at sheathing to blocking and also sheathing to interior walls.

General:
Our structural investigation addressed general structural components only. Interior finishes, exterior siding, flooring, etc. not addressed. Brick chimney needs cleaning and repointing.

MONTANA
THOMAS R.
BEAUDETTE
No. 5566 E
REGISTERED
PROFESSIONAL ENGINEER

# Appendix C

# A Unique Environment

**The Lee Metcalf Wildlife Refuge, the home of the 1878 Peter Whaley Homestead, is home to a distinctive ecosystem that has been modified for centuries by the human occupation and use of the land.**

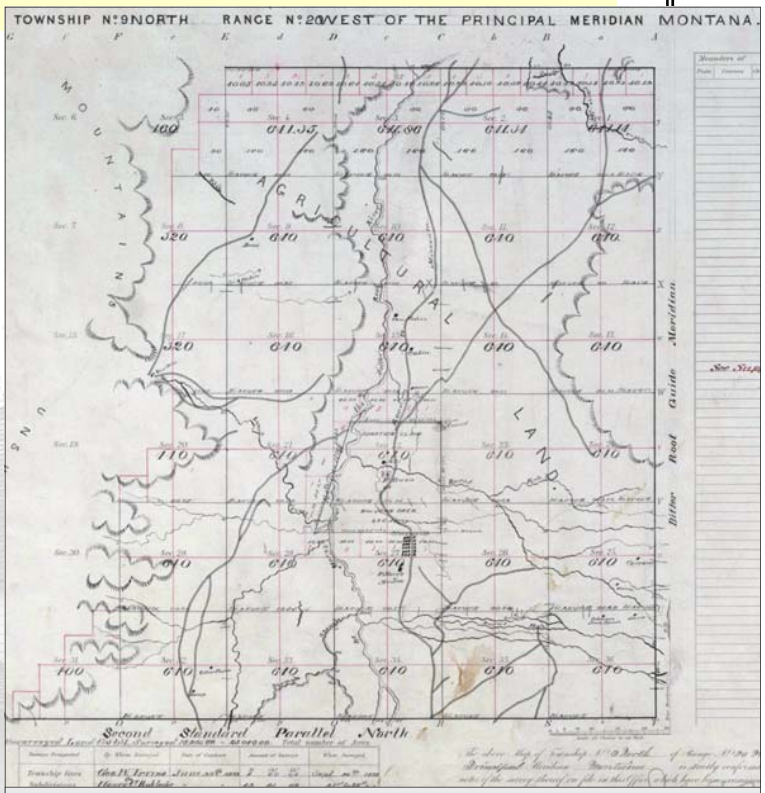
## Diverse Habitats

Waterways heavy with Bitterroot Mountains runoff seasonally refresh the Bitterroot River and create the wetlands-based habitat that is today preserved by the Lee Metcalf Wildlife Refuge.

The ecosystem is rich in biodiversity with many different wildlife, bird and plant species.

## A Variety of Human Occupation & Use

The region also has a long human history. The fertile Bitterroot Valley environment has supported a variety of cultures for thousands of years. Native Americans were here for generations before Father Pierre Desmet first entered the area in 1849 by invitation by the Salish People.




This is a 1873 U.S. General Land Office map of the Stevensville area. The Whaley House was soon built in the southwest quarter of Section 11.

In the mid-1870s, Peter Whaley began to build the house that stands today. Whaley was an early farmer and Fort Owen Indian Agent whose homesteading presence continued the process of human reorganization of the land that continues today.