

**City of Waltham
Community Preservation Committee
Waltham Community Preservation Funding Application Form CPA -1**

Name of Applicant ⁽¹⁾ Historic New England

Name of Co-Applicant, if applicable ⁽¹⁾ _____

Contact Name Carl R. Nold, President and CEO

Mailing Address Historic New England, 141 Cambridge Street, Boston, MA 02114

Daytime Phone (i.e. of Proposal Applicant) 617-227-3956

Address of Proposal (or Assessor's Parcel ID) 185 Lyman Street, Waltham, MA 02452

CPA Category (circle all that apply): Open space **Historic preservation**
Community Housing Open Space Recreation

CPA Funding Requested \$207,000

Total Cost of Proposed Project \$1,050,000

PROJECT DESCRIPTION: Attach answers to the following questions. Applications will be returned as incomplete if all requested information is not provided. Include supporting materials as necessary.

Full application attached

Goals: What are the goals of the proposed project?

Community Need: Why is this project needed? Does it address needs identified in existing City plans?

Community Support: What is the nature and level of support for this project?
Include letters of support and any petitions.

Timeline: What is the schedule for project implantation? Include a timeline for all critical items for their completion.

Credentials: How will the experiences of the Applicant(s) contribute to the success of this project?

Success Factors: How will the success of this project be measured? Be specific.

Budget: What is the total budget for this project? How will the CPA funds portion be spent? All items of expenditure must be clearly identified and justified. Detail the hard and soft costs. Identify contingencies.

Other Funding: What additional funding sources are available, committed, or under consideration? Include commitment letters if available. Identify all sources of other funding which have been sought for this project and the status of the requests.

Maintenance: If ongoing maintenance is required for your project, how will it be funded (Note that CPA Funds may not be used for maintenance, but maintenance is an important consideration for all projects.)

ADDITIONAL INFORMATION: Provide the following additional information, as applicable.

Documentation: Provide written documentation that you have control over the site, such as Purchase and Sale Agreement, option, or deed.

Construction or Rehabilitation: ⁽²⁾ For projects with construction or rehabilitation, provide floor plans, elevations including the existing and proposed site plan(s), and any additional drawings or photographs which visually describe the project.

Zoning: Provide evidence that the project is in compliance with the current City Zoning Ordinance as Amended, as well as all other laws and regulations . If zoning relief is required, note the parts of the proposal not in compliance with the Zoning Ordinance , and when an application will be made to the Zoning Board of Appeals.

City Approvals: Provide evidence that the appropriate City Boards and Commissions approve of the project. As an example, a project in a City park would require that the Recreation Board accept the project.

Hazardous Materials: Provide evidence that the proposed site is free of hazardous materials or that there is a plan for remediation in place.

Professional Standards: Provide evidence that appropriate professional standards will be followed if construction, restoration, or rehabilitation is proposed.

Leveraged Additional Benefits: Provide information indicating how this project can be used to achieve additional community benefits.

Superscripted Notes:

(1) **City Property:** If the proposal is located on City-owned land, either the Applicant or Co-Applicant must be the City Board, Commission or Department that has custody of the land.

(2) **Appraisals:** If the requested funds are for a real estate acquisition, an independent appraisal will be required which the Applicant will be required to fund. No funding decisions will be made without an independent appraisal. Additional appraisals may be required for final approval.

Historic New England respectfully requests a grant of \$207,000 from the citizens of Waltham through the City of Waltham Community Preservation Act to support historic preservation projects at the 1793 Lyman Estate, a National Historic Landmark in Waltham, Massachusetts. Work includes roof repairs, preservation of the veranda and wooden stairs, carriage barn structural and cladding repairs, electrical rehabilitation and preservation of the historic wood floors in the mansion.

Project Narrative



The Lyman Estate

The 1793 Lyman Estate, known as The Vale, is a National Historic Landmark significant for its architecture, designed landscape, horticultural history, and association with the Lyman family. The estate was originally the family home of Theodore Lyman, a wealthy Boston merchant, entrepreneur, and gentleman farmer. In 1793, he commissioned a stately Federal-style house, the sole survivor of the country houses known to have been designed by one of America's earliest and most celebrated architects, Samuel McIntire.

Beginning with Theodore Lyman, and continuing with each successive generation to inherit the estate, the Lyman family had a passion for horticulture, as well as agriculture. Initial construction of the mansion was completed in 1795. In addition to a 600-foot-long brick peach wall, the estate contains a completely intact historic greenhouse complex begun in 1800 with the construction of the Ancient Greenhouse. The estate's first greenhouse is thought to be the oldest extant in the United States. In 1804, the three-part Grape House was built to raise exotic fruits and forced native fruits. This was followed in 1820 by the creation of the Camellia House built

for cultivation of camellias, introduced to America via Europe in 1797 from Asia. In 1840 the Grape and Camellia Houses were connected, thereby creating another greenhouse. By 1839 the estate contained 400 acres and included meadows, ponds, pleasure grounds, woodlands, a deer park, gardens, greenhouses, a working farm, as well as the mansion, carriage house, gardener's cottage and various farm buildings.

For over 150 years, the estate was used as a summer retreat for the Lyman family, who lived on Boston's Beacon Hill the rest of the year. Large expanses of open countryside, together with proximity to Boston, made Waltham an attractive location for country retreats. The estate was enjoyed by four generations of the Lyman family until 1952, when the fifth generation donated the property to Historic New England.

The Lyman Estate is one of the very few remaining landscaped estates from the early nineteenth-century that is both richly documented and largely unaltered. A valuable historical, cultural, and educational resource for the citizens of Waltham and the greater Boston area, the Lyman Estate hosts approximately 20,000 visitors annually. In addition to the historic mansion and greenhouses, the property contains a carriage house and gardener's cottage, and thirty-seven acres of gardens and woodlands that are used by the public. The mansion is primarily used as a function venue, and is one of the most popular historic sites for weddings in the Boston area. The Lyman Estate serves as headquarters for Historic New England's Stewardship Program and Historic Homeowner Services, which specialize in the maintenance and preservation of privately-owned houses. The Lyman Estate additionally serves as headquarters for Historic New England's Property Care Program, which preserves and maintains the organization's collection of thirty-six homes and landscapes in five states.

Goals: What are the goals of the proposed project?

Project Background and Description

In 2010, Historic New England, in partnership with the Architectural Heritage Foundation and the Trustees of Reservations, received a \$650,000 grant from the Massachusetts Department of Energy Resources (DOER). Historic New England is using its \$310,000 portion of the grant to support interior and exterior work at the Lyman Estate to achieve the extraordinary goal of reducing energy consumption by fifty percent while still protecting the historic character of the building. It is our goal to demonstrate that a fifty percent savings in energy usage can be achieved by using traditional and conservative preservation methodologies. This work includes conservation and preservation efforts on the hundred year-old windows, the installation of storm windows, insulation between the second and third floors, air sealing and mechanical work, and replacing multiple outdated furnaces with a single energy-efficient heater and prompted the closing of the mansion for functions for the entire year, while the grounds and greenhouses remain open to the public. By project end, the mansion will be one of the most energy-efficient public historic buildings in the region. This project is already recognized as a national model for other historic homes, both public and private.

Because of the closure of the mansion, the decision was made to move forward on extensive historic preservation projects at the same time that the weatherization projects are occurring. The proposed historic preservation projects for which we are seeking funding from the City of

Waltham Community Preservation Act fall into several categories: roofing repairs, preservation of the veranda and stairs, electrical rehabilitation, preservation efforts on the carriage barn, and preservation and conservation efforts for the wooden floors.

Historic Preservation Work at the Lyman Estate

Historic New England is seeking \$207,000 to support historic preservation projects, that are part of an overall \$1,050,000 in work planned at the Lyman Estate in 2011. Funding from the City of Waltham Community Preservation Act would be applied to historic preservation and rehabilitation efforts not currently funded through other sources and would support the long-term preservation of the property. Historic New England is looking for support for the following projects (see attached scope of work documents):

- Roof Repairs: Although the copper and slate roof sections can be retained in their entirety, repairs to solder joints, flashing and slates need to occur to increase the longevity of the roof and protect the historic material and collections within the house.
- Veranda and Step Preservation Efforts: Inclusive of structural repairs to the veranda and the numerous wooden stairs attached to the structure.
- Carriage Barn Structural and Cladding Repairs: Deteriorated clapboards are prompting a preservation strategy to remove affected clapboards, explore potential structural issues and repair as necessary and then re-clad the structure.
- Electrical Rehabilitation: Upon investigation of the existing wiring in the mansion, it has been found that much of the wiring is an ungrounded copper wire with cloth or rubber covering. This wiring needs to be brought up to code in order for historic fixtures to be returned after conservation work.
- Historic Wood Floor Preservation: The birch floors throughout the first floor of the house have been dated to the period of interpretation and could be earlier construction. The proposed treatment is the final effort to retain the historic floors by removing all surface treatments and then building up a protective layer to be maintained.

Community Need: Why is this project needed? Does it address needs identified in existing City plans?

This project is needed to upgrade the property and increase its value to the community, as a resource to the general public and a destination for tourists, as well as supporting the economic impetus generated by functions at the site.

The grounds of the Lyman Estate and the Greenhouses are open to the public year round and the 2011 planned work will not impact the availability of the property for public use. The Lyman Estate Greenhouses are open, Wednesday - Sunday, December 15 - July 15 and Wednesday - Saturday, July 16 - December 14 from 9:30 a.m. - 4:00 p.m. Tours on the hour are offered the first Wednesday of the month 11:00 a.m. - 2:00 p.m. and are free to Waltham residents. The Greenhouses specialize in orchids, exotic house plants, citrus fruits, camellias, and herbs. Five large specialty plant sales are held during the year. The expert horticultural staff offers advice and assistance with plant selection and culture.

Waltham residents routinely enjoy walking the grounds and the various vistas that the property offers, and many visit the estate daily to walk their dogs. In addition to the grounds being open and available to the public on a daily basis, the Lyman Estate participates in Waltham-based programs and events such as the annual community event, *Historic Waltham Days*. In July 2011, we will participate by hosting an open house day of landscape and “hard hat” tours of the ongoing work inside the house.

In addition to participation in *Historic Waltham Days*, we have participated in the *Books in Bloom* program with the Waltham Public Library. Each year we conduct tours for Waltham High School students as a part of their Waltham history class. Last fall, the Lyman Estate was featured in a production for Waltham Community Access (WCA-TV) on the three historic houses in Waltham entitled *The Estate Show*. Historic New England regularly hosts conferences, public programs, and symposia at the Lyman Estate. For example, in October 2010, the Cultural Landscape Foundation, Washington, D.C., presented its day-long annual symposium, *Shaking Their Yankee Foundations: Evolving Modernist Ambitions*, at the Lyman Estate, focusing on influential landscape architects of the twentieth century. Nationally-recognized speakers from the public and private sectors and the academic community participated in this important event for the historic preservation community. Last December the Lyman Estate hosted a holiday party and house tour for members of the Waltham Historical Society. Historic New England’s own Members’ Holiday Party is held annually at the Lyman Estate with 150 members attending the at-capacity event and many more on the waiting list every year. Historic New England is committing significant resources to the Lyman Estate this year including our staff volunteer clean-up day at the site on April 13.

We will be holding a new event for the community, especially geared towards families, this summer when we bring *Herrmann's Royal Lipizzan Stallions* to Waltham. The Lipizzan Stallions are a rare breed of horses, bred in the sixteenth century for the exclusive use of the Hapsburg royal family of Austria. The horses are known for dramatic leaps and plunges originally developed as aggressive battle maneuvers and now as a display of equine grace and strength. The Lipizzans provided inspiration for the Walt Disney movie *Miracle of the White Stallions*. In 2010, a similar event attracted more than 1,700 visitors to Cogswell’s Grant, a Historic New England property in Essex, Massachusetts.

The preservation work at the Lyman Estate will provide both an immediate and long-term economic benefit to the City of Waltham. In addition to local contractors being encouraged to bid on the different project elements, work on the Lyman Estate will result in money being spent at local gas stations, restaurants, hardware and landscape supply shops, and any number of other resources as contractors supply their workers and work product from local resources.

Longer term, the upgrades to the Lyman Estate will enhance the ability of Historic New England to offer the site as a premier New England venue for functions, including weddings and private parties, corporate events and outings, business meetings and seminars, and holiday parties. The Lyman Estate, one of the first historic houses consistently made available for functions rental, is often booked for at least two weddings a weekend spring through summer and hosts approximately one hundred events a year. In 2010, 9,076 individuals attended functions at the

Lyman Estate—individuals from around the region and the country who may not otherwise have had the opportunity to experience the wide variety of museums and historic sites, hotels, shopping, and restaurants that the City of Waltham boasts. Weddings provide a positive economic impact on tourism as couples reserve blocks of rooms at local hotels and rehearsal dinners almost always bring large groups to downtown Waltham restaurants.

The Lyman Estate serves as a national model for other historic sites and homeowners exploring energy efficiency in older or historic structures. Historic New England is committed to documenting and learning from projects such as the planned work at the Lyman Estate, setting standards of best practices, and sharing the results with those who care for their own historic buildings. Through our weatherization portion of the project, staff will develop knowledge on different sensitive weatherization techniques for historic buildings, and we intend to share our expertise with the public through workshops, lectures, web updates, and a series of project white papers posted at <http://www.historicnewengland.org/preservation/preserving-historic-sites/property-care-white-papers>. Our Historic Preservation Team is partnering with local and regional organizations to hold workshops to help homeowners improve their own homes' energy efficiency without compromising historic integrity. In a city with more than a dozen nationally recognized historic districts, Waltham residents will have an interest in many of these programs designed for homeowners of historic properties.

As part of the preservation work, Historic New England will acquire our own blower door, a diagnostic tool designed to measure the air tightness of buildings and to help locate air leakage sites, to test the efficacy of our weatherization measures. We are ready to offer our assistance to measure air leakage at the City of Waltham owned c. 1770 Wellington House at 785 Trapelo Road, which is undergoing window conservation and storm window installation, to understand the impact of those measures on the building.

Community Support: What is the nature and level of support for this project?

The Lyman Estate is an active participant in the Waltham community and contributes to the historic fabric of the city. The mansion, greenhouses, and landscape are resources for the citizens of Waltham and attractions to tourists visiting the city.

In 2010, the Lyman Estate was named by popular vote to the Boston Globe's list of 1,000 Great Places in Massachusetts:

http://www.boston.com/news/local/massachusetts/articles/2010/07/12/1000_places_to_visit/

Historic New England's marketing efforts have focused on the work at the Lyman Estate and recently the current weatherization work has been covered in the press including:

Waltham's Lyman Estate gets a new view with window restoration, Mar 04, 2011,
Wicked Local Waltham:

<http://www.wickedlocal.com/waltham/features/x2022446087/Walthams-Lyman-Estate-gets-a-new-view-with-window-restoration>

Lyman Estate Beefs Up Energy Efforts: Site undergoing green work, March 13, 2011, The Waltham Patch: <http://waltham.patch.com/articles/lyman-estate-beefs-up-energy-efforts>

Lyman Estate Undergoing green renovations that have big implications for other historic homes, March 21, 2011, Boston.com:
http://www.boston.com/yourtown/news/waltham/2011/03/lyman_estate_undergoing_green.html

Historic New England's YouTube video on window removal:
<http://www.youtube.com/user/HistoricNewEngland#p/a/u/0/1ShMU8ySoXo>

Please find enclosed letters demonstrating community support:

John W. Cox, history teacher Waltham High School, Waltham Historical Society, and Waltham Historical Commission

Angelina L. Emberley, Chairperson, Waltham Historical Commission

Wayne T. McCarthy, Co-President, Waltham Historical Society, Inc.

John C. Peacock, Executive Director, Waltham West Suburban Chamber of Commerce

Timeline: What is the schedule for project implantation? Include a timeline for all critical items for their completion.

Certain elements of the project that are funded from other sources are already underway, including window preservation efforts. The items for which funds are being requested are set to be bid as soon as approval of the CPA funds is announced. We expect to begin roof work and proceed with the electrical work in June, the floors in August, and the exterior repairs in July and August. The project is timed to be completed by December 31, 2011.

Credentials: How will the experiences of the Applicant(s) contribute to the success of this project?

Historic New England

Founded in 1910 as the Society for the Preservation of New England Antiquities, Historic New England is the oldest, largest, and most comprehensive regional heritage organization in the nation, a leader in preservation, research, and innovative programming. Headquartered in Boston, the organization owns and operates thirty-six historic properties in five New England states.

The preservation of historic buildings and landscapes was and continues to be integral to our strategic vision. With 145 structures representing four centuries of architectural styles and 1,212 acres in our care, Historic New England is faced with a continuous challenge in preserving such a diverse and varied collection. Historic New England follows an institutional preservation philosophy that emphasizes the retention of all historic fabric—any feature or part of the structure and site is valuable to the understanding of its evolution and history. Diligent maintenance is the first step in preventing the loss of historic fabric, but if work is required, the condition is analyzed and evaluated to determine the proper approach to preserve the resource. When work is performed, all efforts are made to retain the historic fabric and, if repairs or replacement are necessary, Historic New England strives to match materials in-kind and to fully

document the work that has been performed as prescribed by the Secretary of the Interior's Standards for the Preservation of Historic Buildings.

Historic New England has a long tradition of documenting not only the structures in its care but also any interventions into the fabric of a structure. The professional preservation staff has been maintaining the Lyman Estate since the 1950s. Detailed financial and project management systems are in place to ensure timely and effective project completion. While preservation managers are responsible for specific projects, additional oversight and assistance is given to all projects by the Business Services and Development offices of Historic New England.

Historic New England maintains up-to-date conditions assessments of its properties as an invaluable component of maintenance and project planning for all the historic properties and landscapes the organization owns. The properties are assessed by teams—generally made up of a preservation project manager, a preservation carpenter, a preservation manager, and the site manager. Conditions assessment guidelines and priority ranking systems allow each property to be assessed in a similar fashion, therefore distributing a more uniform ranking system across the organization.

Professional Standards: Provide evidence that appropriate professional standards will be followed if construction, restoration, or rehabilitation is proposed.

For this National Historic Landmark property, and consistent with Historic New England's preservation philosophy, all work on the Lyman Estate will be done in accordance with the Secretary of the Interior's Guidelines for Rehabilitation.

Massachusetts Historic Commission

The Massachusetts Historic Commission holds a Preservation Restriction on the property (attached) and will be required to review all proposed work to ensure that work is in compliance with the Secretary of Interior's Standards for Historic Properties.

Historic New England's Preservation Philosophy

Historic New England is a museum of cultural history that collects and preserves buildings, landscapes, and objects dating from the seventeenth century to the present. It uses these resources to keep history alive and to help people develop a deeper understanding and enjoyment of the New England way of life and appreciation for its preservation. By serving as a role model for the stewardship of New England heritage, Historic New England utilizes its preservation philosophy to educate, to instill an appreciation and awareness of history, to share knowledge and leave a legacy for future generations, and to promote greater involvement on the part of individuals and communities in the preservation of the past.

Statement of Preservation Philosophy

One of Historic New England's primary goals is the preservation of cultural resources. Recognizing that the resources administered by Historic New England, including landscapes, buildings, structures, archeological resources, objects, and archival material, may have different preservation needs and ideologies, Historic New England's preservation philosophy is to:

- Research and document the history, evolution, features, materials, integrity, and areas of significance of resources prior to undertaking any repair or conservation work. Research

should be considered a continuum that serves to direct the overall management approach for resources, and records Historic New England's contribution to their care and maintenance;

- Monitor usage to prevent irreparable loss of historic fabric;
- Choose maintenance and conservation treatments that reflect a commitment to retaining and preserving historic material;
- Recognize and preserve the design and craftsmanship that has uniquely shaped a resource over time;
- Disseminate the experiences and information associated with resources to internal and external audiences; and
- Follow or exceed nationally-accepted professional standards and guidelines, as appropriate for each discipline, in order to ensure the longevity of resources and maintain a reputation for innovation and the highest quality of work.

Approved by the Board of Trustees on September 24, 2008

Project Coordinators:

Benjamin K. Haavik, Team Leader, Property Care (2004 - Present)

M.S. in Historic Preservation, University of Pennsylvania, Philadelphia

- Responsible for the preservation and maintenance of the thirty-six historic house museums and landscapes in the Historic New England collection
- Manages full-time staff of thirteen including preservation carpenters, property care managers, and regional landscape manager.
- Develops and manages \$1.5 million annual budget
- Previously Deputy Director, Historic House Trust of New York City, Inc., where he managed stewardship activities for one-hundred historic structures at twenty-two historic sites.

Haavik meets the National Park Service Qualification Standards for: Architectural Conservator; Historical Architect; and Historic Preservationist.

Colleen Chapin, Preservation Manager, (2007 - Present)

Graduate of the North Bennett Street School, Boston, Massachusetts

- Responsible for the preservation and maintenance of sixteen Historic New England properties
- Chapin has over a decade of project management experience, and has held a Massachusetts Construction Supervisor License since 2006

Chapin is overseeing the work at the Lyman Estate and is responsible for the development of project scope and specifications, selecting skilled craftsmen and tradesmen, ensuring adherence to high quality standards, documenting all work details to contribute to the property's history, and performing building performance metrics to ensure a high return on our investment.

Administrative and Financial Management Capabilities

Historic New England has extensive experience in the administration of grant projects.

Currently, the active grant portfolio includes funds from more than forty government, corporate,

foundation, and state organizations, totaling close to \$1.5 million annually. Historic New England has administered Community Preservation Act funding from the Town of Yarmouth, Mass., and the City of Quincy, Mass., and is currently working with the City of Gloucester, Mass., and the City of Cambridge, Mass., to implement historic preservation projects. We are experienced with the standards and management required to implement Community Preservation Act funded projects.

All planned work has been reviewed not only by Historic New England's internal interpretation committee to ensure the treatment is consistent with our overall approach to the property and is in keeping with our own preservation philosophy, but also with our Trustee-level Properties and Landscape committees comprised of some of the nation's foremost experts in their respective fields.

Success Factors: How will the success of this project be measured? Be specific.

Success for this project will be measured in different ways.

- The first measurement of success is the continued preservation of historic material whether through the roof repairs, repairs to the veranda and steps, floor preservation efforts, and electric work, ensuring this Waltham landmark is protected for the future.
- The second measurement will be bringing the exterior elements, including the landscape and the exterior paint colors, into alignment with our overall interpretation of the property.
- The third measurement of success relates to the weatherization project, our achieving fifty percent reduction in energy use through conservative preservation methods, and being able to share that information with the public through a series of white papers published on our website and a series of public programs.
- The fourth measurement of our success is sharing the expertise and knowledge we gain from this project with smaller historical societies and organizations through our Affiliates membership program, and through direct support such as our offer to conduct blower-door tests at Waltham's Wellington House.
- The fifth measurement of success is Historic New England's ability to offer the site as a premier New England function property for social and corporate events, attracting events and their associated guests and vendors to Waltham, and also to use the site to offer expanded programs and symposiums to the public.

Budget: What is the total budget for this project? How will the CPA funds portion be spent? All items of expenditure must be clearly identified and justified. Detail the hard and soft costs. Identify contingencies.

In total, Historic New England is projecting a total investment of approximately \$1,050,000 into facility upgrades for the property during 2011. We are requesting a grant from the citizens of Waltham through the Community Preservation Act for the historic preservation and rehabilitation components of the project which represents \$207,000 of the total budget.

The breakdown of the project budget is as follows:

| Funder | Component | Description | Cost |
|-------------|--------------|--------------------------------------|--------|
| Waltham CPA | Roof Repairs | Repairs to the copper roof and slate | 70,000 |

Historic New England
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| | | roof as well as flashing repairs to prevent water penetration | |
| Waltham CPA | Exterior Preservation - Veranda and Stairs | Structural repairs to the veranda and stairs on the exterior of the building | 33,000 |
| Waltham CPA | Exterior Preservation - Carriage Barn | Structural repairs and siding repairs for the carriage barn | 50,000 |
| Waltham CPA | Electrical Rehabilitation | Removal of first-floor fixtures revealed sub-code wiring that needs to be rehabilitated before re-installing historic fixtures | 36,000 |
| Waltham CPA | Floor Conservation | Final efforts to retain the historic wood flooring throughout the first floor. | 18,000 |
| | | Sub Total 1 Waltham CPA | \$207,000 |
| Historic New England | Window Conservation | Removal and conservation of all 120 historic wooden sash | 161,000 |
| Historic New England | Chandelier and Sconce | Removal of sconces and chandeliers from first floor spaces, conservation efforts, re-wiring of fixtures and returning fixtures | 20,000 |
| Historic New England | Paint Analysis - Exterior | Paint analysis to determine appropriate 1920s paint color scheme for the house | 25,000 |
| Historic New England | Facility Improvements | Miscellaneous projects including: Exterior and interior paint, rollers and UV protection, window treatments and runners, upgrades to kitchen equipment, protection and storage of collections items during work | 293,000 |
| Historic New England | Landscape and Garden Restoration | Landscape efforts to restore features to 1920s appearance, major pruning efforts of historic plants, and recovery of lost section of the path system | 34,000 |
| | | Sub Total 2 Historic New England | \$533,000 |
| DOER | Weatherization Project | Storm windows, air sealing, insulation, mechanical system upgrades | \$310,000 |
| | | Total Project Cost | \$1,050,000 |

* Above project numbers are based on contractor estimates for the work. The exterior preservation of the carriage barn includes contingencies because we do not know what structural issues we will find when we begin the work.

Other Funding: What additional funding sources are available, committed, or under consideration? Include commitment letters if available. Identify all sources of other funding which have been sought for this project and the status of the requests.

The requested CPA funding is only a portion of the project. The project funding is broken down as follows:

- Historic New England is seeking \$207,000 from the Waltham CPA to support the currently unfunded preservation aspects of the project.
- \$310,000 has been secured through the Massachusetts Department of Energy Resources (DOER) for weatherization work on the house itself.
- \$243,000 has been secured through Historic New England's Preservation Maintenance Fund to support the Lyman Estate project.
- \$115,000 is being funded through Historic New England's FY12 operating and capital budgets as approved March 23, 2011 by the Board of Trustees.
- \$175,000 of the project is as yet unfunded and different sources are being explored.

Preservation Maintenance Fund

In 2009, Historic New England secured the largest grant in its history, a total of \$3 million over three years to address preservation maintenance needs for our thirty-six historic properties. An anonymous foundation approved \$600,000 outright for 2009; \$1.2 million for 2010, which was successfully matched with \$600,000 raised elsewhere; and \$1.2 million for 2011, which must now be matched by an equal amount raised. We are now raising funds toward the 2011 matching gift requirement of \$1.2 million. We must raise the full match to secure this critical grant funding. A grant from the citizens of Waltham through the City of Waltham Community Preservation Act would be matched one-to-one in our third and final year of the Preservation Maintenance Fund challenge grant and leverage \$207,000 in additional funds for preservation.

The Preservation Maintenance Fund supports projects that contribute to the long-term sustainability of Historic New England's properties and finances. Examples include reducing costs by installing efficient heating systems, replacing roofs with materials that will be good for twenty or more years, and resolving water penetration issues. Historic New England is committed to sharing the knowledge and expertise gained through this work so that other museums and historic property owners across New England and the nation will benefit from this grant. The grant is part of a strategy to ensure sustainability as Historic New England enters its second century, and to position us as a national model for heritage preservation organizations.

Maintenance: If ongoing maintenance is required for your project, how will it be funded?

It is Historic New England's philosophy and practice that long-term preservation is a result of good maintenance. The prevention of damage and the assurance of long-term maintenance are undeniably better for the preservation of the site than any repair or replacement of historic material.

In addition to ongoing maintenance staffing costs, Historic New England budgets approximately \$20,000 every year for basic maintenance practices at the Lyman Estate, and approves additional project-specific funding through annual budgets for maintenance priorities. On-site function rental income contributes to the budget. Historic New England's Boston-region landscape crew allocates approximately two days per week throughout the spring, summer, and fall maintaining the grounds of the property. As a high visibility site, the Lyman Estate has always been a priority for painting projects and overall care. A new maintenance process for the care of the historic wood floors will be integrated into our plan.

Conclusion

When complete, these preservation efforts will complement a campaign of heating system replacement, energy efficiency upgrades, painting, landscape restoration, and general facility improvements. A \$207,000 grant from the citizens of Waltham through the Community Preservation Act will ensure the continued preservation of this significant structure and landscape, part of the historic fabric of Waltham and one of the few examples of a country estate extant in the Boston area. We welcome the opportunity to have the support of the City of Waltham in this significant historic preservation project.