

**City of Waltham Massachusetts
Community Preservation Act
Historic, Open Space and Recreation
Funding Application WCPA-1**



APPLICANT INFORMATION

Name of Applicant ⁽¹⁾ City of Waltham

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

Contact Name Jeannette A. McCarthy

Mailing Address 610 Main Street, Waltham, MA 02452

Daytime Phone (i.e. of Proposal Applicant) 781-314-3100

PROJECT BASICS

Address of Project (or Assessor's Parcel ID) 100 Robert Treat Paine Dr., Waltham, MA 02452

CPA Category (check all that apply):

- ☐ Open space
- ☒ Historic preservation
- ☐ Open space recreation
- ☐ Community Housing (You must also complete Application WCPA-2)

CPA Funding Requested \$354,200

Total Cost of Proposed Project \$354,200 (design fees previously appropriated)

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.

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 (Waltham Historical Commission for Historic, Conservation Commission for Open Space, Park & Recreation Board for Recreation, and Waltham Housing Authority for Community Housing). As an example, a project in a City park would require that the Park & 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.

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.

FOR COMMUNITY PRESERVATION COMMITTEE USE ONLY

Application received on 10/18/12 **RECEIVED**
Application received by @ Mayor's Office **OCT 18 2012/WMS**
Date Project presented to CPC for Submission Acceptance Process **BY: WMS**
Was Project accepted for Consideration? _____
If accepted for Consideration, Project Public Hearing date _____
Following meeting Date for decision to recommend for funding _____
Was project recommended for funding to the City Council? _____
Was project funded by the City Council? _____
If project funded by the City Council, for how much? _____
Date funding Contract signed with applicant _____

Jeannette G. McCullough, Mayor
Applicant

October 18, 2012
Date

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.

About Stonehurst

Stonehurst, the country place of social reformer Robert Treat Paine and his family, is a masterpiece of integrated design resulting from the career-long collaboration between two visionaries, architect Henry Hobson Richardson and landscape architect, Frederick Law Olmsted, whose work continues to inspire culturally and environmentally sensitive design. The convention-breaking house and 109-acres of surrounding conservation land were donated in 1974 to the City of Waltham.

We envision an exciting future for Stonehurst as a nationally known historic site celebrating the continuing relevance of the historic role of design and community planning, a regionally prominent center for hosting community preservation programs, and a local venue for appropriate functions all at a level compatible with ongoing preservation. We aim to confirm and strengthen the historic reputation of Waltham as a center for innovation and draw national attention and funding to Waltham.

Goals: What are the goals of the proposed project?

The project is aimed to provide universal access and restroom improvements to this municipally-owned National Historic Landmark, in order to comply with the American Disabilities Act (ADA). The first floor of Stonehurst was made wheel-chair accessible in 1992. The proposed project will expand access to restored spaces on the second floor without compromising irreplaceable historic fabric of this national treasure. The proposed Universal Access and Restroom Improvement Implementation Project will:

- 1) restore vertical access from the first floor to the second floor, the two public levels of the building, by providing a wheelchair lift within a small historic elevator hoistway, vented through a historic chimney so as not to impact the roof
- 2) remove an existing unisex accessible toilet room, currently separated from the other toilet rooms, and renovate public men's and women's toilet rooms with integrated accessible fixtures in each.

The City of Waltham owns and operates Stonehurst as a museum and function hall, which has about 8,000 annual visitors to its interiors. Currently, second-floor historic rooms and offices are inaccessible to people in wheelchairs who visit or work in this public building. Previous support from the CPA for the planning of this project demonstrated the City's efforts to comply with ADA; this effort leveraged external funding for improvements to these public spaces. In the past two years, significant federal and private funds have been secured to restore and interpret rooms on first and second floors in order to provide a meaningful experience to all museum visitors, casual visitors, meeting attendees and function guests.

Stonehurst-The Robert Treat Paine Estate
Universal Access Improvements: Elevator and Toilet Rooms: Implementation

The universal access project has been under consideration since the early 1990s. From the start, it was determined that the ideal location for the elevator was within a historic hoistway, one which was installed in about 1910 when Robert Treat Paine became infirm. The historic hoistway led from a hallway adjacent to room described as the "Old Den" on the first floor of the 1866 wing to the second-floor hallway adjacent to a linen closet. This linen closet was installed by H.H. Richardson in 1886. Works for the old lift are located on the third floor.

When the lift was removed in the 1980s, a wheelchair accessible restroom was installed in its place on the ground floor. The second and third floors of the historic hoistway were simply blocked off and preserved. The beadboard outer lining of the hoistway wall remains visible in the Richardson-era linen closet, a space which also survives intact. The linen closet is one of only two remaining historic areas where the stories of the servants can be told, since the City has rehabilitated most of the servant spaces for modern uses.

In addition to the wheelchair lift, the project includes improvements to the modern men's and women's restrooms, which will be updated and made universally accessible. The house currently has only one accessible restroom which lies in the path of the historic hoistway. When the wheelchair lift is reintroduced to the hoistway, the current accessible restroom will be demolished, creating the need for incorporating new universally accessible facilities into the men's and women's restrooms.

Modern restrooms are now located in a back area of the 1866 house, in the old "Aviary" adjacent to the servant's quarters. In the 1980s, the City of Waltham rehabilitated the Aviary space for its needs by subdividing the area and fitting it up with modern plumbing fixtures, industrial tiles, and drop ceilings. As part of the proposed project, the City will remove the 1980s alterations and install modern restrooms that are more in keeping with the historic interiors of this National Historic Landmark. The renovations will add universally accessible fixtures to both the women's and men's restrooms, increasing the benefit to people with disabilities.

Mills Whitaker Architects, a firm with design experience for accessibility in historic structures, has designed restroom improvements and a wheelchair lift to fit within the existing historic hoistway space. The relevant state and local boards have reviewed and approved of the project, and the Massachusetts Architectural Access Board and Elevator Board have granted the required variances to move forward as proposed in the attached floor plans.

Now that plans and approvals for the universal access project are in place, the City seeks funding for implementation in order ensure that all people have access to public areas of this local, regional and national treasure.

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

The Americans with Disabilities Act states that state and local governments must ensure that individuals with disabilities are not excluded from services, programs, and activities because public buildings are inaccessible. Stonehurst is a public building as well as a tourist attraction, and must be brought into compliance with the ADA. The City of Waltham has considered this universal access project since the early 1990s, when the ADA was passed into law, but second-floor spaces at Stonehurst remain inaccessible to people in wheelchairs.

This Universal Access and Restroom project is described as a high-priority goal in the Conservation Assessment Plan for the building (Claude Emmanuel Menders, Architects, Inc., 2000) and the Five-Year Strategic Plan for all operations of the property, which was developed by community and organizational leaders and consultants (2003).

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

A feature historical attraction of Waltham, Stonehurst is unusual in that it is a nationally significant resource and yet it is municipally-owned and community-based. In September 2000, Stonehurst provided an appropriately picturesque setting for the signing of the Community Preservation Act, "one of the most important pieces of environmental legislation in the Commonwealth's history." Stonehurst was honored to serve as host for this historic occasion fifteen years in the making. The restoration of the Olmsted-designed landscape received a preservation award from the Victorian Society of America New England Chapter in 2001. In 2002, the estate reached a national audience when it was featured in an episode of the popular PBS television show, "This Old House," and when its exterior preservation was designated an official Save America's Treasures project. A 40-page, full-color monograph on the property was published in 2007. There are currently about 24,000 annual visitors, who range from trail hikers and private event guests to scholars, architects, students and history lovers. The website www.stonehurstwaltham.org reaches a global audience.

A public-private partnership between the City of Waltham and the non-profit Robert Treat Paine Historical Trust ensures the future of Stonehurst as an essential part of the community. The Friends of Stonehurst, the membership arm of the Trust, is open to all. Community and organizational leaders developed a Five-Year Strategic Plan for all operations of this property administered by the City Planning Department. Stonehurst is currently offering school programs, house tours and public educational programs cohosted with like-minded non-profit organizations. It is rented as a unique and memorable venue for non-profit, civic and private events and meetings.

Because the property is municipally-owned, Stonehurst's relationship to the public school system is unusually close. Thanks to several federal grants, we have received advice from scholars, museum educators and local teachers to strengthen what is now our greatest programmatic accomplishment: a school program that we offer to all third graders in the Waltham Public School System at no cost to the students. However, because there is no elevator, handicapped children are currently confined to the first floor.

The Waltham Disability Services Commission, Waltham Historical Commission, Massachusetts Historical Commission, Massachusetts Architectural Access Board, and Massachusetts Elevator all support and approve of this project.

See Attachment A. for Evidence of Community Support and City Approvals

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

The construction phase of this project will effectively close down this popular City-owned museum and function facility for a period of months while public restrooms are reworked. The City relies on income from rental functions and visitors to help offset the operating costs of this property. Therefore, the project must be carefully timed to coincide with the off season, in order to maintain the peak-season income stream.

Since rental clients schedule weddings and special events far in advance of the actual event, the City must also plan in advance of this project. The City will reserve January through April 2013 for construction, and will not book any functions during that period. This schedule is inflexible, since the City is signing contracts for rental functions during other months of the year.

Prompt approval of funding will ensure that the project is completed according to this strict schedule.

STONEHURST- THE ROBERT TREAT PAINE ESTATE
Renovations of Elevator & Toilet Rooms
Draft Schedule: as of 10/11/2012

September 2012	Central Register Advertisement (& Newspapers) Submitted Central Register Publication Bidders Tour at Project Site
October 2012	Sub-Bids Due General Bids Due Apparent Low Bidder(s) References Checked
December 2012	Owner-Contractor Agreement Executed Construction Start – Submittal process
January 2013	Construction Start – On-site Work
April 2013	Substantial Completion
30 April 2013	Final Completion

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

Mills Whitaker Architects is known for its portfolio of award-winning designs for accessibility improvements to historic structures.

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

The proposed CPA-funded portion of the project will be successful when universal access is accomplished, preservation standards are met, and the project is completed as specified, within budget and on time. Bidding documents and preservation samples will ensure that the bidders are qualified and experienced in the preservation of National Historic Landmarks. The architect will ensure the quality of workmanship and materials and compliance with the Secretary of the Interior's Standards for the Treatment of Historic Properties.

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.

\$322,000	Low bid, Casby Bros., Inc., West Roxbury, 10/12/2012
<u>\$ 32,200</u>	10% Contingency
\$354,200	Total

FORM OF GENERAL BID -- p.2

NAME OF BIDDER: Casby Bros Inc.

B) Bidder acknowledges receipt of the following addenda:

No. 1 Dated: 9/27/12

No. 2 Dated: 10/2/12

No. _____ Dated: _____

No. _____ Dated: _____

C) The Bidder agrees to perform the bid work described in the specifications and shown on the plans for the following contract price: \$ 322,000.00

THREE HUNDRED TWENTY TWO THOUSAND DOLLARS

D) The subdivision of the proposed contract price is as follows:

Item 1. The work of the general contractor, being all work other than that covered by Item 2.

\$ 215,000.00

Item 2. Sub-bids as follows:--

Sub-trade	Name of Sub-bidder	Amount	Bonds required, indicated by "Yes" or "No"
<u>LIFT</u>	<u>GARAVENTA</u>	\$ <u>28,400</u>	<u>NO</u>
<u>AVAC</u>	<u>DIVISION ISHVAL</u>	\$ <u>28,700</u>	<u>NO</u>
<u>PLUMB</u>	<u>P.J. PIONNE</u>	\$ <u>32,000</u>	<u>NO</u>
<u>ELEC</u>	<u>GALWAY</u>	\$ <u>17,900</u>	<u>NO</u>
Total of Item 2:		\$ <u>107,000</u>	

The undersigned agrees that each of the above named sub-bidders will be used for the work indicated at the amount stated, unless a substitution is made. The undersigned further agrees to pay the premiums for the performance and payment bonds furnished by sub-bidders as requested herein and that all of the cost of all such premiums is included in the amount set forth in Item 1 of this bid.

The undersigned agrees that if he is selected as general contractor, he will promptly confer with the awarding authority on the question of sub-bidders; and that the awarding authority may substitute for any sub-bid listed above a sub-bid filed with the awarding authority by another sub-bidder for the sub-trade against whose standing and ability the undersigned makes no objection; and that the undersigned will use

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.

**Universal Access and Interior Restoration Project
Budget**

	CPA	Total
Committed: Architectural and Engineering	\$ 80,901	\$ 80,901
Pending: Implementation Costs*	\$354,200	\$354,200
Total	\$435,101	\$435,101

The City has proven its commitment to providing universal access to second floors by hiring architects and engineers to design this project.

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.)

The staff and daily operation of Stonehurst is overseen by the Planning Department of the City of Waltham. The City's Building Department has a maintenance budget for all City buildings, including Stonehurst. The Building Department currently maintains all elevators within City-owned buildings.

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.

See Attachment C

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.

See Attachments E, F, G

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.

See Attachment D

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.

The Conservation, Historical and Handicapped Commissions and the Planning and Building Departments that oversee the property agree that this project is a very high priority.

See Attachment A

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

Stonehurst and the Storer Conservation Lands were a privately owned seasonal country estate for residential and agricultural use until 1974 when they were donated to the City of Waltham. There has been no commercial use of the property at any time in its long and well-documented history. When Stonehurst was constructed in 1886, many hazardous materials did not exist. In 2000, the building was tested for asbestos and none was found. However, this project will open up concealed areas which were altered in 1974-1983. There is a possibility that these modern alterations introduced asbestos to the proposed project area.

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

The state and local historical commissions hold preservation restrictions on the National Historic Landmark property. They have reviewed and approved schematic designs and will review near-final plans and specifications when they become available. The project will comply with accepted preservation practice and the *Secretary of the Interior's Standards for the Treatment of Historic Properties*, using appropriate traditional materials and technologies through repair or in kind replacement of historic building fabric. The intent is to preserve as much original material as possible. Preservation samples displaying techniques, materials and level of workmanship have been prepared for contractors.

Stonehurst-The Robert Treat Paine Estate
Universal Access Improvements: Elevator and Toilet Rooms: Implementation

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

Please see "Community Support" above which describes a myriad of community benefits ranging from school programs for local children that are fun, popular, educational, and inspiring to regional and national exposure for the City of Waltham as a responsible and innovative steward of a National Historic Landmark.

If awarded, CPA funding would bring Stonehurst in compliance with ADA.

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.