

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

Name of Applicant ⁽¹⁾ City of Waltham Planning Department for Stonehurst, the Robert Treat Paine Estate

Name of Co-Applicant, if applicable ⁽¹⁾ Waltham Historical Commission, Waltham Handicap Commission

Project Name Stonehurst Universal Access and Interior Restoration Project

Contact Name Ann Clifford, Paine Estate Curator and Ronald Vokey, Planning Director

Mailing Address 100 Robert Treat Paine Dr. Waltham, MA 02452

Daytime Phone (i.e. of Proposal Applicant) 781-314-3291

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

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

CPA Funding Requested \$673,000 for Access Improvements

Total Cost of Proposed Project \$975,000

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.

About Stonehurst

In 2000, Stonehurst, the Robert Treat Paine Estate was honored to be selected from among thousands of worthy sites in Massachusetts as the most appropriate setting for the signing of the Community Preservation Act into law. Now that the CPA has passed in Waltham, it is equally appropriate for Stonehurst to be one of the first recipients of significant CPA funding.

The ideal country home of social reformer Robert Treat Paine, Stonehurst is an American masterpiece resulting from the career-long collaboration between H.H. Richardson and Frederick Law Olmsted, leading designers who broadly influenced the way Americans live and relate to their environment. 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. By fostering creative thought about community planning, we aim to confirm and strengthen the historic reputation of Waltham as a center for innovation and draw national attention and funding to Waltham. We have begun to realize this vision by offering programs, tours and literature to the public and school groups, and by serving as a venue for civic events, private events and meetings.

Goals: What are the goals of the proposed project?

The proposed Universal Access and Interior Restoration Project will result in significant improvements to Stonehurst and consist of essentially two major components: 1) designing and constructing an elevator to provide access to all four floors of the house, making improvements to restrooms, and relocating a handicapped bathroom; and 2) restoring second-floor rooms and adding interpretive signage throughout the house for the enjoyment, education and inspiration of all visitors.

As evidence of the importance of proceeding with this project, funds from several sources have been secured, others are pending, and significant funds have already been expended to develop plans for the handicapped bathroom, second-floor restoration and interior signage. Considerable staff time funded by the City has been devoted to developing applications and working with teams of consultants on project planning. This attests to the commitment of the City of Waltham, federal government, and private foundations to enhance this national treasure for the public good. The end result will be a dramatically improved tourist attraction that is accessible to all.

For many Stonehurst visitors who come from all over the country, a visit or event at the estate may be their only reason for coming to Waltham. Their experience at Stonehurst will shape their perception of the City of Waltham as a whole, particularly since it is owned and operated by the City. The larger project is aimed to strengthen connections with both casual and museum visitors to Stonehurst through permanent exhibits and signage. It grows out of a federally-funded plan for interpreting and furnishing the interiors of this world-class icon of American design. New permanent signage will introduce the story of the site and fundamental interpretive concepts to those 6500 annual casual visitors who now have no ready access to this core information. The universally accessible exhibits will help fulfill the organizational mission "to ensure that diverse audiences enjoy, appreciate, and draw inspiration from Stonehurst and the legacy of those who created and lived in it."

CPA funding is sought for universal access and restroom improvements to this municipally-owned National Historic Landmark. The first floor of Stonehurst was made wheelchair-accessible in 1992. The project for which we seek CPA funding will expand access to spaces on the second floor, third floor and basement without compromising irreplaceable historic fabric of this national treasure. The elevator will be installed in an historic elevator shaft; the existing handicapped bathroom will be relocated to a new space; and all bathrooms will be renovated.

Specific goals of the CPA-funded portion of the proposed project are:

- Hire architects and engineers to see the elevator and restroom project through schematic design and design development; prepare construction documents, evaluate bids, and administer construction.
- Preserve historic fabric.
- Install new underground 3-phase electrical service; emergency electrical generator; elevator shaft; 4-stop, 2000 lb capacity, standard speed, electric-powered elevator; elevator machine room and venting; and carpentry, plumbing, electrical and finishes for restrooms.

Third-floor offices and second-floor historic rooms are currently inaccessible to people in wheelchairs who visit or work in this public building. External funding for improvements to these spaces will not become available until they are made fully accessible in compliance with the Americans with Disabilities Act (ADA). If awarded, CPA funding would bring Stonehurst in compliance with ADA, and leverage additional funds from non-municipal sources for other improvements. If not awarded, those external funds will be in fact be jeopardized.

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

The immediate needs and long-term goals for Stonehurst require a large infusion of funds from a variety of sources. Major funding has been secured for the preservation of the house and landscape through the federal Save America's Treasures program, the Massachusetts Department of Environmental Management, the Massachusetts Preservation Project Fund, and the City of

Waltham. The preservation projects followed upon a Conservation Assessment Plan for the structure and a Historical Landscape Report and Plan.

While emergency repairs to the physical plant were being funded and implemented, a Five-Year Strategic Plan was developed for all operations of the property by community and organizational leaders and consultants. The visitor-oriented plan stressed the importance of restoration and interpretation of the interiors and the installation of exhibits for public education, enjoyment, and inspiration.

Federal grants from the Institute of Museum and Library Services and the National Endowment for the Humanities funded an Historic Interiors Plan and a plan for interpreting the interiors of Stonehurst. Schematic designs for the interior exhibits are complete. The exhibits are intended to create context and relevance for the casual visitor; convert casual visitors to museum visitors; improve the depth and breadth of the museum experience; and raise local awareness, appreciation and support for this under-appreciated national treasure. Providing barrier-free access to existing and newly restored rooms will open the spaces and exhibits to all.

The universal access project has been under consideration since the early 1990s. It is now imperative that the project be implemented given that the rooms on the second floor are in the process of being restored and interpreted. In 2004, schematic designs for a Limited Use/Limited Access (LULA) lift were prepared and approved by the Massachusetts and Waltham Historical Commissions, which hold preservation restrictions on the property. The proposed LULA was approved because it would not impact the roof or historic fabric of the interiors but was less than ideal because it expanded access to only the second floor.

More recently, preservation architects have found a creative solution to the challenge of providing universal access to this National Historic Landmark. They propose an electric elevator with a cab size that fits within the confines the existing historic elevator shaft—minimizing impact to the historic structure, in complete conformance with Massachusetts Architectural Access Board (MAAB) code, and providing access to all four floors. Full plans and specifications for the accessible bathroom, funded by a Community Development Block Grant, currently exist.

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 this year. 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. With a current federal grant, we will be installing interpretive signage that tells the story of Stonehurst and provokes thought on cultural, historical, natural and architectural resources that enhance community.

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 interdisciplinary, interactive third-grade school program uses history—artifacts, documents and the site itself—to teach concepts studied in science class. Stonehurst teachers visit each classroom beforehand to excite the ethnically diverse group of children about Lily Paine, a child who once lived in complete harmony with nature at this unusual bouldered and shingled house in Waltham. By studying vernal pools, sundials, life cycles, trees, open space and architecture designed for healthy living, students learn on their site visit that habitats of humans—like all organisms—must provide for their basic needs. This program with strong ties to both the science and history strands of the Massachusetts Curriculum Frameworks will eventually be offered to other school systems in the area.

See Attachment A. for Evidence of Community Support

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

Designer Selection	Feb 2008
Schematic design	April 2008
Review by state and local historical and handicapped commissions	June 2008
Design development	August 2008
Bid document preparation	September 2008
Bidding process	October-November 2008
Construction start	January 2009
Construction completion	January 2010

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

The City of Waltham has proven both its sound administrative and financial management capabilities and its long-standing commitment to the preservation of Stonehurst over the past twenty years. As the Curator of Stonehurst for the past eight years, Ann Clifford has primary responsibility for planning, directing, and coordinating the administration, operation, interpretation, restoration, maintenance, and security of the building, its grounds and its collections. Clifford is an art and architectural historian who received a certificate in Museums Studies at Tufts University while she was obtaining her Masters degree in Art and Architectural History at Tufts. At Stonehurst, she has built an extraordinary record in successfully planning, raising funds and implementing well over a dozen state, federal and private grant-funded projects. She has personally secured over \$800,000 in grants for capital work and special projects and assembled exceptional teams of consultants and scholars with national reputations. Projects under her administration include: exterior and structural preservation of the building; restoration of the Olmsted-designed grounds; Conservation Assessment Report for the building; Historic Interiors Plan (includes Interpretive Plan and Furnishing Plan); Strategic Plan for the property, interior exhibits and signage and a 40-page, full-color guidebook.

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

The proposed CPA-funded portion of the project will be successful if universal access is accomplished, preservation standards are met, and the project is completed within budget and on time. Bidding documents and preservation samples will be carefully developed to ensure that the bidders are qualified and experienced in the preservation of National Historic Landmarks. They will ensure the quality of workmanship and materials and compliance with the Secretary of the Interior's Standards for the Treatment of Historic Properties. In the long term, the project will be successful if annual maintenance is appropriately funded and administered, protecting and sustaining this substantial investment of tax dollars.

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.

Universal Access and Interior Restoration Project
Budget

Expenses	CPA	Matching Funds	Total
Universal access improvements and restrooms*	\$673,000		\$673,000
Interior interpretation/signage –design		\$52,000	\$52,000
Interior interpretation/signage – implementation		\$100,000	\$100,000
Second floor room restoration		\$150,000	\$150,000
Total	\$673,000	\$302,000	\$975,000

**Please see attached spreadsheets for a detailed breakdown of costs for the proposed Universal Access Improvements and Restrooms.*

Stonehurst, Robert Treat Paine Estate: Universal Access Improvements **Architect's Opinion of Probable Cost**

CSI		Description		Notes
2	sitework	New underground 3-phase electrical service	50,000	Power capacity in the street to be determined
6	wood	Limited removal of architectural woodwork in linen closet and re-installation		Second floor Linen Closet is historically significant
		Protect and save original first floor "den" door as Stonehurst artifact		
		Remove and salvage original c. 1900 elevator pulley wheel and related equipment.		
		Modification in attic to accommodate elevator equipment		Pertains to overhead and adjacent elevator equipment
		Modifications for relocated handicapped restroom		
			40,000	
9	finishes	Elevator Shaft construction	0	Cost included in #14, see below.
		Plaster and paint new handicapped restroom		
		Tile for HC restroom		
			10,000	
10	specialties	Handicapped restroom grab bars and other equipment		
		Items related to elevator		
			15,000	
14	elevator	4-stop, 2000 lb capacity, standard speed, electrical powered		Requires positive ventilation of the shaft
		Elevator machine room and venting	200,000	
15	mechanical	Handicap restroom fixtures and installation		
		Positive ventilation for elevator shaft		
			30,000	
16	electrical	Emergency generator		Required equipment with electrical elevator
		Elevator and HC Restroom		
			40,000	
		Contingency 20%	77,000	
TOTAL ADA Project Cost			462,000	
Other		General public restroom renovations	100,000	

Stonehurst, Robert Treat Paine House: Universal Access Improvements

Professional Service Provider	Schematic Design	Design Development	Construction Documents (bidding set)	Bid/Negotiation	Constr. Admin.	TOTAL	
Basic Services (AIA B-151)							
Architectural Services including Structural Engineer and MEP engineer	10,500	14,000	24,500	7,000	14,000	70,000	
Subtotal Basic Services	10,500	14,000	24,500	7,000	14,000	70,000	
Architect's Additional Services							
Consultants (Owner approvals required per AIA B-151)							
Civil Engineer for underground electrical service (3-phase)	3,000	3,000	3,000		1,000	10,000	
Elevator consultant	2,500					2,500	
Materials Testing Services: UTS of Massachusetts, Inc.					2,500	2,500	
Cost Estimator	1,500	1,500	1,500			4,500	
Architect's Additional Services, if any examples per phase, per AIA B-151-Art 3	hourly program revisions to SD plans	hourly program revisions to DD plans	hourly program revisions to CD plans, Bid Alternates, coordination of consultants	hourly value engineering bid prep	hourly Change Order prep, Contractor substitutions, Construction Administration beyond 4 mo.		
Architect's Full Services	17,500	18,500	29,000	7,000	17,500	89,500	
Reimbursable Expenses:							
Photography, printing, mileage, etc (budget)			2,000	3,000	2,000	7,000	estimated costs
Basic Services for general use public restrooms renovation							
		5,250	5,250	1,500	3,000	15,000	
Combined Total	17,500	23,750	36,250	11,500	22,500	111,500	

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

Expenses

Elevator (universal access improvements)	\$673,000
Interior interpretation/signage -design	\$ 52,000
Interior interpretation/signage - implementation	\$100,000
Second floor room restoration	\$150,000

Total \$975,000

Income

Committed

Institute of Museum and Library Services (interior interpretation/signage—design)	\$ 52,000
Robert Treat Paine Historical Trust (second floor room restoration)	\$ 45,000
Massachusetts Foundation for the Humanities	\$ 5,000

Proposed

Community Preservation Act (universal access improvements)	\$673,000
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Pending

Fidelity Investments (second floor room restoration)	\$100,000
National Endowment for the Humanities (interior interpretation/signage-implementation)	\$100,000

Total \$975,000

See Attachment B for Letters of Commitment

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.

Stonehurst-The Robert Treat Paine Estate
Universal Access and Interior Restoration Project

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 Attachment D

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 F

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 E

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.

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, and will be reviewing plans as they are developed. 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.

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, and leverage additional funds from non-municipal sources for other improvements. While the elevator project is underway, applications for private and grant funding will be submitted for the restoration and interpretation of interiors on both the first and second floors. If not awarded, those external funds will be in fact be jeopardized.

Once complete, the interior interpretation will convey the story of this national treasure and the City of Waltham to the tens of thousands of visitors who visit it annually.

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.

Attachments

- Attachment A. Evidence of Community Support
- Attachment B. Letters of Commitment for Funding
- Attachment C. Deed
- Attachment D. Plans and Specifications
- Attachment E. Evidence of City Approvals
- Attachment F. Evidence of Zoning Compliance