

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

Project Name Stonehurst Exterior Preservation 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 \$245,000

Total Cost of Proposed Project \$990,000

Stonehurst-The Robert Treat Paine Estate
Exterior Preservation Project

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 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.

We aim to complete the high-profile exterior preservation project begun in 2002 which was recognized and funded as an official Save America's Treasures project. This federal program initiated by the White House Millennium Council was created to identify and preserve "the enduring symbols of American tradition that define us as a nation."

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.

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

The preservation, restoration and maintenance of this nationally significant structure owned by the City of Waltham is a perpetual and challenging task. In order to best approach the numerous and costly physical needs of Stonehurst, a Conservation Assessment Report was prepared in 2000. The completion of the Exterior Preservation Project is the first step in a carefully conceived plan outlined in the Conservation Assessment Report (2000) to stabilize the physical plant, making it safe and accessible to all visitors. The comprehensive report identified the stabilization of the building envelope as the immediate preservation priority. \$600,000 in federal, state, municipal and private funds have been secured for some of the most urgent roofing, flashing, water management, carpentry and structural needs. However, a major component of the work—extensive door, window

and masonry repairs—remains unfunded. Stonehurst has over 100 windows and 15 exterior doors that were in extremely poor condition in 2004 and now urgently need immediate repair. They no longer function as barriers to the elements and their loose sheets of glass pose an alarming safety hazard. Plans, specifications, and window & door schedules already exist for this project that can be deferred no longer.

Goals: What are the goals of the proposed project?

The proposed second phase will 1) repoint two Richardson chimneys that have active leaks; 2) rehabilitate all windows with glazing, sash, and frame repair as required; 3) refinish and correct operational problems of all doors as required; 4) supply ultraviolet light filters for the windows and glazed doors in order to protect the interior finishes; 5) reproduce tower balustrades; 6) repair porch decking and 7) protect the preservation work from the weather with historic finishes. At the conclusion of the work, the building envelope will be better prepared to resist weather, doors and windows will be operational and secured, and interior furnishings and woodwork will be protected from harmful ultraviolet light.

Masonry. Richardson's lithic style is well represented in this building composed largely of massive glacial boulders. Mortar joints in two of the Richardson chimneys are in very poor condition. Temporary repairs near the flashing were made in 2005 to mediate active leaks, but other weak mortar joints will continue to contribute to the damp environment within the walls of the building until the chimneys are fully repointed. The repointing program will restore the profile of the bouldered masonry to its historic high relief. Complete repointing of the building is deferred.

Windows and Doors. Stonehurst has over 100 windows and 15 exterior doors, of numerous configurations that contribute to the picturesque quality of the house. These are some of the most vulnerable and most visible components of the envelope, being the visual and physical link between interior and exterior. As with most wooden elements of the house, the harsh New England weather has taken its toll on the windows and doors which are exceeding their 100-year life. Paint and clear finishes are in poor condition, leaving these wooden members unprotected. In addition, the weakened elements are stressed by frequent operation, aggravating their problems. The most deteriorated elements overall are the bottom rails of the windows and glazed doors. Operation is spotty overall. Furthermore, interior finishes and furnishings are severely sun damaged, since the windows and glazed doors currently offer no protection from the damaging ultraviolet rays of the sun. The trim of the windows and doors was repaired as part of Phase I.

In the proposed project, windows across the Richardson addition and the earlier Second Empire wing will be reconditioned. This work will include securing the sash stiles and rails with dowels and pins, and eliminating any surface applied metal brackets. Sash cords and weights will be restored to smooth operation. Glazing putty, where missing or cracked, will be repaired. Missing parts will be replaced to match the historic profile. Transoms over double hung windows at the Richardson addition will be reconditioned in the same manner as the windows, as will the glazed

doors. Ultraviolet light filters will be applied to glazing. The door hang and hardware will be adjusted for proper operation. (This is particularly problematic at the main entrance.) Missing elements of wood panel doors will be reproduced matching extant elements. Damaged elements will be repaired with epoxy. Loose pieces will be refastened. Lost elements and inappropriate recent replacements will be replaced. Historically appropriate hardware will be installed. The sash and doors will be stained or painted according to their historic treatment.

The Palladian window and three, double-hung 21-over-21 attic windows at the eastern gable end of the Richardson addition are in extremely poor condition. Old epoxy repairs have failed at most horizontal applications. The wood at these failed repairs is significantly deteriorated and will be replaced with new wood matching the old. The sash will be tightened, sagging meeting rails will be straightened, the glazing putty will be renewed, sash cords and weights will be restored.

The skylight at the kitchen wing is rusting due to failure of protective coatings. Significant metal deterioration will be repaired.

Porch floors. The open porch beneath Richardson's signature arch on the east elevation has no protection from the weather, and yet has a basement beneath it. Structural members beneath the porch have been compromised by water and insect damage resulting from ongoing leaks. This project would introduce ice and water shield beneath the floor boards of the east porch, to prevent water from entering the basement. The system will simulate the one installed on the south loggia in 2004. The porch floor will be installed in removable sections which can be lifted for seasonal cleaning of debris. The decking of each porch—east, south and north—has deteriorated to the point where it poses a safety hazard, and will be replaced.

Tower Balustrades

According to original drawings and early photographs, master American architect H.H. Richardson designed balustrades to crown each of the three towers of Stonehurst. These features were economically reproduced in the 1980s with inappropriate materials and methods that fared poorly in a short amount of time. They were necessarily removed in about 2000. These key architectural features are currently missing from this National Historic Landmark, presenting an inaccurate and unfinished profile. This project will reproduce the balustrades, each of a different design. Preservation samples of balustrades have been prepared to demonstrate standards of material (mahogany) and craftsmanship.

Historic finishes

Paint analysis of trim, body, sash, doors, porch floors and ceilings was conducted in 2004 to determine the historic color scheme. The trim and body of Stonehurst were painted at that time, but painting of the windows and doors were deferred until funds were secured for their extensive repairs. In order to protect the repairs completed in this project, the windows, doors and porch floor will be primed and painted to colors historic to 1886.

Specifications and plans for the overall project, including a preliminary schedule of all window and door repairs are attached. 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.

Community Support: What is the nature and level of support for this project? Include letters of support and any petitions. (Letters of support from RTP Historical Trust, Waltham Historical Commission) Attach newspaper articles about school programs and new guidebook.

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. Its mission to promote thoughtful community planning and preservation is conveyed through school programs, house tours and public educational programs cohosted with like-minded non-profit organizations. 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 program accomplishment: a school program that we offer to all third graders in the Waltham Public School System at no cost to the students. This interdisciplinary, interactive 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	Dec 2007- Jan 2008
Final revisions to existing bidding documents	Jan 2008
Bidding process	Feb-Mar 2008
Construction start	April 2008
Construction completion	December 2009

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 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 project will be successful if the preservation standards are met and the project is completed within budget and on time. Bidding documents and preservation samples have been carefully developed to ensure that the bidders are qualified and experienced in the preservation of National Historic Landmarks. They 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.

	CPA	Matching Funds	Total
Exterior Preservation Project			
Expenses Phase I (completed)			
Construction		616,000	
Additional roof work		29,000	
Consultants: A&E, archeology, etc.		84,000	
Project coordinator		12,000	
Expenses Phase II			
Repair all windows & doors repairs	100,000		
As per existing schedule			
Repoint 2 chimneys	15,000		
Replace 3 balustrades	40,000		
Repair porch floors	20,000		
Finishes	10,000		
Contingency 25%	37,000		
(the above costs were obtained in 2004)			
Architectural & engineering fees (10%)	23,000		
Total	245,000	745,000	990,000

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.

INCOME: Phases I and II

Committed

Save America's Treasures Grant, National Park Service	300,000	
Massachusetts Preservation Projects Fund	75,000	
City of Waltham	340,000	
Robert Treat Paine Historical Trust	10,000	
1772 Foundation	20,000	
Total committed		745,000

Proposed

Community Preservation Committee	245,000	
Total proposed		245,000

TOTAL REVENUE **990,000**

See Attachment B for Letters of Commitment

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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.

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 Commission, the Historical Commission, the Planning Department and Building Department 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.

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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 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. Not only will the preservation project will protect the interiors from the elements and the damaging ultraviolet rays of sunlight, it will improve the energy efficiency of the building and reduce municipal annual expenditure. As the building envelope is being secured with CPA funding, applications for private and grant funding will be submitted for the restoration and interpretation of interiors. 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