

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



APPLICANT INFORMATION

Name of Applicant ⁽¹⁾ Mort Isaacson, Chair, Waltham Historical Commission

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

Contact Name Ann Clifford, Curator of Stonehurst

Mailing Address Stonehurst, the Robert Treat Paine Estate, City of Waltham

100 Robert Treat Paine Dr., Waltham, MA 02452

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

PROJECT BASICS

Address of Project (or Assessor's Parcel ID) Stonehurst, the Robert Treat Paine Estate

City of Waltham, 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 \$754,163

Total Cost of Proposed Project \$789,163

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

James A. McCully
Mayor 9/9/2020

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 9-8-2020

Application received by Julie Toole

Date Project presented to CPC for Submission Acceptance Process 9-8-2020

Was Project accepted for Consideration? Yes

If accepted for Consideration, Project Public Hearing date 9-15-2020

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 _____

APPLICATION SUBMISSION REQUIREMENTS

Proposals for Community Preservation Act funding must be submitted using the City of Waltham's Application forms WCPA-1 and WCPA-2.

If the proposal is exclusively a community housing project, applicants must submit WCPA-2. If the proposal combines community housing with any other funding category, both WCPA-2 and the WCPA-1 must be submitted. Otherwise applicants can submit just WCPA-1.

All information requested on the application forms must be included with the proposal at the time of submission or it will not be accepted for consideration. Applications may not include any handwritten information.

Applications and all supporting documentation must be submitted as hardcopy with eleven (11) copies (including one unbound for reproduction) to the official mailing address as specified in Article VI. If an Application is recommended for funding by the CPC, then an additional 17 copies must be provided for use by the City Council.

Applicants are encouraged to include any maps, diagrams, and/or photographs pertaining to the project. Letters of support for the project from community organizations or other sources may also be submitted.

Applicants will also submit an electronic version of each and every document submitted in their application if available, either on CD or USB flash drive, preferably in Portable Document Format (PDF) or other commonly used file formats (eg. .doc, .docx, .xls, .xlsx, .jpeg).

Applicants should include actual quotes for project costs whenever possible. If not available, estimates may be used, provided the basis of the estimate is fully explained.

Applicants should pursue matching or supplemental funds from state, federal and/or private sources when available.

Applicants should detail who will be responsible for project implementation and management. Their relevant experience should be included in the narrative. Please be sure that project management costs have been included in the overall project budget.

Stonehurst, the Robert Treat Paine Estate

Exterior Preservation - Construction

GOALS

The City of Waltham requires immediate funding for the preservation of the architectural fabric of the only National Historic Landmark under its stewardship: Stonehurst, the Robert Treat Paine Estate, designed by Henry Hobson Richardson and Frederick Law Olmsted.

We are grateful to the CPC for awarding funding in 2019 to hire a preservation team to study and provide recommendations for stabilizing the most urgent preservation needs of the building envelope and structure. The current request to the CPC will fund the construction phase of the exterior preservation project, implementing the recommendations of their study and completing and refreshing the site's last major preservation effort in 2002.

The picturesque convention-breaking structure blends a variety of natural stone and wood materials in complex, organic forms to harmonize with the surrounding New England landscape. Richardson and Olmsted's shared vision for an architecture completely at one with its setting transformed American design, and the contrast at Stonehurst between its Second Empire wing (1866) and its massive Richardson addition (1886) provides evidence of that transformation.

Given its intended affinity with nature, it is ironic that natural elements and forces such as water and gravity pose the greatest threats to Stonehurst. Its distinguishing picturesque and complex design features are inherently problematic, and even more so in the harsh climate of New England.

The grant will support a comprehensive program of exterior preservation and restoration. Grant work on the exterior will reduce the threat of water damage to the interior, will slow deterioration of the original building fabric inside and out, will present an exterior appearance as close to that of the 1880s as possible, and will improve the safety and experience of visitors.

This project will complete the restoration of the roof begun with CPC funding in 2017. The mansard portion of the roof, which was deferred due to limited funding, will be restored with red cedar shingles. As noted a year ago, we witnessed an alarming increase in the rate and extent of wood decay, which is now pronounced and widespread across the entire building. Now that major sections of the roof have been secured, deteriorated porches, sills, trim, clapboards and other members will be need to be preserved with epoxy and Dutchmen and painted.

Other elements that have decayed beyond repair or are missing altogether must be reproduced. These include major load-bearing structural elements such as columns supporting the south loggia, north porch and roof and the framing of the south loggia parapet. They also include distinctive architectural features such as the tower balustrades of the Richardson wing.

Exposed cedar shingles that characterize Richardson's Shingle Style addition are now 35 years old and quite mossy and decayed, requiring replacement. About one dozen windows on the kitchen ell and elsewhere with rotted and broken sash will be reconditioned. Stone foundations will be selectively repointed. A deteriorated porch floor will be replaced and stone steps will be reset to improve visitor safety.

COMMUNITY NEED

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 preservation of the exterior envelope was identified as 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. In 2002, \$800,000 in federal, state, municipal and private funds were secured for some of the most urgent roofing, flashing, water management, carpentry and structural needs. Since that comprehensive preservation effort, CPC funding has supported the preservation of windows and doors, accessibility improvements and, most recently, a partial new roof. Now, in 2020, nearly two decades have passed since the comprehensive preservation effort, twice the time than is recommended to maintain any wooden structure. Once again, exterior preservation ranks at the top of the list of needs for this widely-used and beloved community asset and National Historic Landmark.

See Attachment D for illustrations of existing conditions. Copies of the comprehensive Conservation Assessment Report (2000) are available upon request.

COMMUNITY SUPPORT

A feature 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, the Commonwealth of Massachusetts selected Stonehurst as the most appropriate setting in the state for the historic signing of the Community Preservation Act, because it so perfectly represents the three goals of the act: historic preservation, affordable housing and open space. (Mr. Paine was a leading housing reformer of the 19th century.) In a typical year, there are about 24,000 annual visitors, who range from trail hikers and private event guests to old-house buffs, students, scholars and architects. People can become more involved through the non-profit Robert Treat Paine Historical Trust (DBA Friends of Stonehurst).

Community and organizational leaders developed the Five-Year Strategic Plan for all operations of this property with a mission "to ensure that diverse audiences enjoy, appreciate, and draw inspiration from Stonehurst and the legacy of those who created and lived in it." When not faced with a global pandemic, the property routinely offers public programs, is regularly open to the public, and is utilized as a popular event venue for private, civic and non-profit community

events. Information panels, guidebooks, and pamphlets are available to all visitors, enhancing their experience regardless of their reason for visiting. Even a miniature branch of the Waltham Public Library is available on site.

The municipally-owned site typically offers about a dozen public programs each year, frequently in collaboration with the Waltham Public Library, and other non-profit organizations in Waltham. Over 20 years, our popular third-grade school program has reached thousands of Waltham students and families, introducing children to this remarkable natural and cultural community resource in their back yard.

Even in the current coronavirus pandemic, we are working with eighth-grade civics teacher to develop curriculum on working women of Massachusetts and their struggle for the vote in celebration of the woman suffrage centennial. Visitors to the grounds can peek through the windows to enjoy a pop-up exhibit about Waltham's remarkable women suffragists from Labor Day to Election Day.

See Attachment A for Evidence of Community Support.

TIMELINE

Sept-Oct 2020	CPC and City Council review & approval of funding
Sept-Oct 2020	Bidding for construction
Nov 2020	Construction start
Dec 31, 2021	Project completion

CREDENTIALS

The responsibilities for the property cross City of Waltham departments—from the Building Department, to the Stonehurst staff within the Planning Department, to the Historical and Conservation Commissions. Each group brings its experience and expertise to the project. The Superintendent of Public Buildings will work with the Curator of Stonehurst and Waltham Historical Commission to ensure the project's success.

Following the public procurement process, the City of Waltham hired Red Hawk Studio Architects, Inc., to design and oversee the project. Karle Packard, AIA, the firm principal with over 35 years of experience in historic renovation, successfully worked with the City on the recent roof preservation project at Stonehurst and is therefore quite familiar with the unique needs of the structure. As before, Packard has prepared carefully written bidding documents to ensure that the bidders are qualified and

experienced in the preservation of similar historic properties. His bid documents and construction oversight will ensure the quality of workmanship and materials and compliance with the *Secretary of the Interior's Standards for the Treatment of Historic Properties*.

The project will be successful if it: 1) stabilizes the building envelope and structure; and 2) meets preservation standards. 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.

See Attachment B Credentials.

BUDGET

Stonehurst Exterior Preservation	COMMITTED	Current CPC Application	Total
Design Services	\$ 35,000		
Construction*		685,603	
Contingency (10%)		68,560	
Total	\$ 35,000	754,163	789,163

*See Attached C Cost Estimate.

OTHER FUNDING

The CPC has already committed \$50,000 for design services (through the bidding phase) to this project.

MAINTENANCE

The City of Waltham Building Department has a maintenance budget for all City buildings, including Stonehurst. The daily operation of Stonehurst is overseen by the Planning Department of the City of Waltham. The Historical Commission receives monthly updates.

ADDITIONAL INFORMATION:

DOCUMENTATION

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

Deeds are on file with the CPC, and are also available upon request. (Middlesex Country Registry of Deeds, 13234/233 ff.; 12720/249 ff. and 17712/179 ff.)

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.

Attached are 100% complete drawings prepared by Red Hawk Studio Architects, Inc. Illustrations visually describing typical existing conditions are attached as well. Specifications are available upon request.

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 E

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 Waltham Historical Commission which helps oversee the property is the applicant and has received approval for the project from Massachusetts Historical Commission.

See Attachment F

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 surrounding Storer Conservation Lands were a privately-owned seasonal country estate for residential and agricultural use until 1974 when the property was 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. In 2013, a small amount of asbestos was found by a furnace and beneath modern floor tiles and was removed.

PROFESSIONAL STANDARDS

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

The Massachusetts Historical Commission holds preservation restrictions on this National Historic Landmark property, requiring their review and approval of all major projects. In accordance with these restrictions, the exterior preservation project must 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. Bid documents carefully prepared by the professional preservation team will ensure that the contractors are qualified to perform the work and that these standards are met.

The Massachusetts Historical Commission has reviewed and approved of the project.

See Attachment F. Preservation restrictions recorded in the Middlesex County Registry of Deeds are available upon request.

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, educational, and inspiring to regional and national exposure for the City of Waltham as a steward of a popular National Historic Landmark in need of additional support. The City's preservation project will take emergency measures to halt the wood decay, mitigate structural damage, protect the exterior fabric and interiors from the elements, and ensure the safety of visitors, demonstrating its continued commitment to the care of this nationally significant property under its stewardship.