

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

Name of Applicant <sup>(1)</sup> WALTHAM HISTORICAL COMMISSION

Name of Co-Applicant, if applicable <sup>(1)</sup> WALTHAM REC DEPARTMENT

Contact Name ARCHIE BENNETT

Mailing Address CITY HALL, CITY OF WALTHAM

Daytime Phone (i.e. of Proposal Applicant) 617-435-7766

Address of Proposal (or Assessor's Parcel ID) 735 TRAPELO ROAD

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

CPA Funding Requested 500,000

Total Cost of Proposed Project \$1,000,000 - 3,000,000 WITH PROPOSED PARK

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

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

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

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

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

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

**Superscripted Notes:**

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

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

## **PROJECT DESCRIPTION**

### **Goals:**

The property is currently abandoned and has been for over 20 years. The City of Waltham obtained the Wellington House and .55 acres of land at the end of 2006. Wellington House is surrounded by conservation land and a large (7 acre) parcel of land that is owned by the City of Waltham. This project will ensure the survival one of the most significant Georgian style and period structures still extant between Cambridge and Route 128. The goal is to restore and preserve the house for enjoyment of the citizens of Waltham.

Restoration and rehabilitation of the property will lead to a public use of the premises. Present ideas included housing the Waltham Historical Society and its large collection. The house and the story of the Wellingtons will be integrated into the curriculum of the elementary and high school educational programs. The house may serve the recreational development of the adjacent 10 acres that the City of Waltham owns. Homeowners in Waltham will learn about preservation and maintaining their house while watching "Our Historic House" on the local cable access channel.

### **Community Need:**

The Wellington House, once part of Middlesex Hospital, was neglected during the end of the public ownership. Deterioration due to lack of maintenance started under public auspices. The state sold the property into private hands and the building was neglected even further. The Waltham Historical Commission (WHC) has constantly feared over the last three decades that the house would be subject of vandalism or demolition. The physical condition of the interior and exterior of the house is deteriorating rapidly. Waltham will stabilize the structure through a re roofing project in the spring. The need to stabilize the rest of the outside envelope will require additional monies provided by the MPPF Grant. The WHC estimates that there will be three or four phases of restoration with a cost of over \$500,000.

The WHC actively advocated for the donation of the property with a preservation easement. Additionally, the Developer, Pulte Homes, donated \$105,000 towards the restoration of the property. Marcus Davis Companies have also \$100,000 to the project. A television program on the local cable access channel is producing a program called "Our Historic House" that will focus on the Wellington House from planning through completion of the project. Developers, carpenters and tradespeople in Waltham have indicated a willingness to volunteer services, time and materials towards the rehabilitation of the building. A Massachusetts Preservation Project Fund Grant has been received for \$42,000. A funding stream through the next several years would enhance additional grant applications by providing matching monies.

Having been neglected, by the Commonwealth and then private owners, for so long the Wellington House is in need of many repairs. The house is tremendously significant to, not only, the City of Waltham, but also to the Commonwealth for its ties to architecture and agriculture. Rehabilitation of the property to the Secretary of the Interior's Standards will require additional funding. The WHC can think of no greater urgent need then to stabilize this significant 18<sup>th</sup> Century structure and begin to use the house for the public's benefit.

### **Community Support:**

The community support has been very generous and enthusiastic with private individuals, non profits, businessmen, public servants, Commonwealth agencies, and politicians all solidly behind the restoration of the Wellington House. See accompanying letters of support.

### **Time line:**

The WHC expects that the total rehabilitation of the Wellington house will take place over the next 4 years in 4 phases. The current planned project followed by 4 more phases. Each phase would be planned and budgeted in each of the next four fiscal years.

### **Credentials:**

The City of Waltham has always demonstrated the highest capabilities to administer funds and complete grant projects. Waltham has completed MPPF Grants at the Robert Treat Paine Estate and a Pre-Development MPPF grant given to the City for the Old Waltham Police Station. MPPF Grants have always been completed on time by preservation professional, Arthur F. Bennett, acting as the Local Project Coordinators (LPC). Mr. Bennett will be the LPC on this project. The architect, Roger Panek, has been the preservation consultant on numerous MPPF Grant Projects. He has great organizational skills and expertise to bring the project to fruition.

Waltham has a sterling reputation for its administrative and financial management capabilities and, more important, performance. The City takes great pride in incorporating the Secretary of the Interior's Preservation Standards into its important historic buildings. Presently the City of Waltham is in the bidding process for the \$25 million restoration of the Whittemore Elementary School. That project has been reviewed by the Waltham Historical Commission (WHC), who worked closely in the design phase, and subsequently the Massachusetts Historical Commission (MHC). MHC has relied on the WHC recommendations and oversight capabilities for the monitoring of the Whittemore School.

Cooperation and the resources of the offices of the Mayor, Historical Commission, Auditor, Law Department, Purchasing Department, Planning Department and Building Department are imperative for a successful project. The City of Waltham stands ready to complete the project in a timely and effective manner.

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#### **Success Factors:**

Success factors would be measured over time during the four phases of complete restoration of the C1779 House. A continuing television series on the local channel "Our Historic House" to inform and help homeowners restore their homes. An educational component would be to incorporate the house into the teaching of history in Waltham. We are currently working on a joint venture that would transform the surrounding parcels of land into a park and passive recreational area.

<b>Budget:</b>	<b>Requested</b>	<b>Value</b>
1 <sup>st</sup> Phase (presently contract pending) exterior FY 2007.	\$100,000	\$220,000
FY2008, FY2009, FY2010, FY2011 Phase 2 -5. (\$100,000/year)	\$400,000	

**Other Funding:**

Approximately \$200,000 through corporations donations has been designated for matching funds for the project. An additional \$42,000 has come from the MPPF of the Massachusetts Historical Commission. Subsequent grants and funding will be leveraged with the commitment of future CPA funds.

**Maintenance:**

The Wellington House will be maintained by the Building Department and the Waltham Historical Commission of the City of Waltham.

**ADDITIONAL INFORMATION**

The Wellington House Construction Project is permitted and regulated by the City of Waltham Ordinances and the Commonwealth of Massachusetts General Laws. All matters and documents pertaining to this section of the application have been verified by both the City and the Commonwealth including: Documentation, Construction and Rehabilitation, Zoning, City Approvals, Hazardous Materials, Professional Standards, and Leveraged Additional Benefits. Copies and assurances will be supplied on request from the CPC.

See Drawings and Bidding Documents.

EXTERIOR RESTORATION  
WELLINGTON HOUSE  
735 TRAPELO ROAD  
WALTHAM, MASSACHUSETTS

INVITATION TO BID

The City of Waltham invites sealed bids from Contractors for the: "EXTERIOR RESTORATION WELLINGTON HOUSE" at 735 Trapelo Road in Waltham, Massachusetts, in accordance with the Contract Documents. General bids for Contractors will be received at the Office of the Purchasing Agent, City Hall 610 Main Street Waltham, Massachusetts at the time specified below, at which time they will be opened and read aloud.

Pre-Bid meeting is scheduled for Wednesday, September 12, 2007 at 10:30 am local time at Wellington House, 735 Trapelo Road, Waltham, MA.

Bid opening is scheduled for Wednesday, September 19, 2007, at 9:30 am local time at the Office of the Purchasing Agent.

Plans, Specifications and other Contract Documents may be seen, examined or obtained at the Office of the Purchasing Agent, City Hall 610 Main Street Waltham, Massachusetts 02452 on or after Wednesday, September 5, 2007. Copies thereof may be obtained for the purposes of bidding with a refundable deposit of \$100.00 in the form of a certified check drawn to the order of the City of Waltham for each set of Contract Documents. If mailing is required, please enclose a separate and non-refundable check in the amount of \$25.00 made payable to Roger Taylor Panek Architects Plans/specifications will be mailed by Roger Taylor Panek Architects only.

Procedures respecting bids and the selection of Contractors shall be in conformity with the Massachusetts General Laws, Chapter 149, Section 44A through 44H, inclusive, as well as guidelines established by the Deputy Commissioner of the Division of Capital Asset Management Regulation 810 C.M.R. 4.00.

Every General Bid submitted by the Contractors shall be accompanied by a Division of Capital Asset Management Certificate of Eligibility, Contractor Qualification Update Statement, Certificate as to Corporate Bidder (if incorporated), Certificate of Compliance, and bid deposit in the form of cash, certified check or Bid Bond, made payable to the City of Waltham issued by a surety company qualified to do business in Massachusetts and acceptable to the Owner. The amount of this bid deposit shall be 5% of the amount of the total bid (the sum of the bid prices for both buildings). Such bid deposits shall be dealt with as provided in the General Laws.

Division of Capital Asset Management (DCAM) Certification for the Contractor must be for **HISTORIC BUILDING RENOVATIONS**. Contractor must also have experience on at least 3 National Register properties in the past 5 years.

Bids shall be made on the basis of the Prevailing Wage Rate Schedule as determined by the Commission of Labor and Industries, pursuant to the provisions of Chapter 149, Section 26 to 27D inclusive, of the General Laws. The minimum wage rates determined by the Commission of Labor and Industries as applicable to this project are included in the bid documents as WR-1 - WR-8.

The successful bidder will be required to furnish a Contractor's Performance Bond and Payment Bond. The amounts of the Contractor's Performance Bond and Payment Bond shall be for the full amount of the Contract (the sum of the bid prices for both buildings) and such premiums shall be included in the bid amount. Such bonds shall be issued from a surety company qualified to do business under the Laws of



the Commonwealth of Massachusetts and acceptable to the Owner, and shall be in a form acceptable to the Owner.

The Owner reserves the right to reject any or all bids, if it be in the public interest so to do, and to act upon the bids and make its award in any lawful manner.

All work on this project must meet the requirements of all applicable state and local codes, laws and ordinances, as well as the requirements of the Specifications. The project is being partially funded by the Massachusetts Historical Commission, and is listed in the State Register of Historical Places, requiring the Secretary of the Interior's Standards for the Treatment of Historical Properties to be followed.

State Law prohibits discrimination in employment; and an Affirmative Action and Equal Opportunity Policy shall be followed.

No bidder may withdraw their bid for at least thirty (30) days, Saturdays, Sundays and legal holidays excluded after the time and date set for the receipt of General Bids.

All work must be substantially complete within ninety (90) days of Notice to Proceed.

Sections 29, 34, 34A and 44A through 44J of Chapter 149 of the General Laws of the Commonwealth of Massachusetts are incorporated herein by reference, as well as Sections 39F through 39P of Chapter 30 of the General Laws of the Commonwealth of Massachusetts and all other provisions of the General Laws applicable to public construction on this Project. Any inconsistency between the Invitation to Bid, Information for Bidders, Bid Forms, Conditions or any other Contract Document or potential Contract Document and these statutes, or any other applicable statutes, by-laws or regulations existing on the date on which a bid is submitted, shall not be grounds for invalidating the bidding procedure, but where required by law, such statute, by-law or regulation shall be deemed to govern.

For the:  
City of Waltham

Waltham, Massachusetts 02452

Date: