

**February, 2024**

## **CITY OF WALTHAM**

### **Request for Proposals**

#### **Lease of the Tarbell Hall and a Portion of Land at the Former Fernald State School, Located at 190 Trapelo Road, Waltham, Massachusetts**

#### **I. Introduction**

The City of Waltham (Lessor) is offering for lease, "AS IS," the building known as Tarbell Hall, at the former Fernald School, located at 190 Trapelo Road, Waltham, Massachusetts, as generally identified on the site plan attached hereto as Appendix A. The building is vacant. The City will lease a portion of the land surrounding the building for the purposes of parking and outdoor activities based upon the actual use of the land. (Leased Premises)

Tarbell Hall is a brick structure. The property was built in 1934, has four stories with a basement, contains 38,924 square feet, more or less, according to state records. The property and building are on the National Historic and State Historic Registers; and are subject to a Memorandum of Agreement. (Appendix B and Appendix C)

#### **II. Site Information**

Located in the Central Campus of the former Walter E. Fernald State School, Tarbell Hall is a former residential hall, in proximity to other former residential halls, Seguin, MacDougall and Dolan. The City acquired the former Fernald property on December 23, 2014. The Girl Scouts' property is in proximity to Dolan, MacDougall, and Seguin Halls. There is abundant open space as well. The "Nature Area" and pond, 40 plus acres within the Recreation Department's acreage, in the northwest part of the property has been restored to its natural condition. Grocery stores, stores, banks, and restaurants are located westerly off Lexington Street/Trapelo Road and easterly in Belmont, in the Waverley Square area. There are residences, restaurants and businesses off Waverley Oaks Road, and an entrance into the former Fernald property.

The MBTA's Waverley Station, which is part of the Fitchburg rail line, providing access to North Station in Boston, is located at 525 Trapelo Road in Belmont, MA. Route 128/Interstate 95 can be accessed via Trapelo Road west.

The building is being leased "AS IS" and the Lessor makes no representations, nor warranties as to the condition of the Leased Premises, nor the fitness for its intended use or purposes. Other than what may be stated herein, Lessor is under no obligation to make any repairs, renovations, alterations to the Leased Premises.

The land and building are located in a Conservation/Recreation Zoning District.

### **III. Use**

- A. Lease or disposition of the Leased Premises is subject to the approval of both the Mayor and City Council (2/3 vote).
- B. Tarbell Hall is an historic building, and its exterior must be preserved. City of Waltham Community Preservation (CPC) funds may be available for the exterior of the building. The City will cooperate with Lessee's application to CPC for exterior repairs. The lease of this building is for a use that does not derogate or harm the surrounding neighborhood.
- C. The City intends to lease Tarbell Hall for affordable housing for families. The building contains 86 rooms and 30 bathrooms. The City will work with the Lessee to obtain zoning for the above-stated use.

### **IV. Required Terms and Conditions**

In addition to Articles I, II and III above, incorporated herein by reference, use of the premises is subject to the following terms and conditions:

- A. The term of the Lease shall be for a period of ten (10) years to thirty (30) years. Lessee may propose a longer or shorter term if it so desires. However, anything over 30 years would require a Special Act of the Massachusetts Legislature.
- B. The City will work with Lessee to make sure sufficient land is available for Lessee's parking and outdoor activities.

- C. The Lessee shall be responsible for nominal rent payments due and payable each year on the anniversary date of the Lease payable to the City of Waltham and submitted to the City's Maintenance Department, 25 Lexington Street, Waltham, MA 02452.
- D. Lessee shall be responsible for payment of all utilities and services including, but not limited to, heat, electricity, water and sewer charges, cable/internet and rubbish disposal.
- E. The Lessor, in addition to other rights and remedies, shall have the right to declare the term of the Lease ended if the Lessee:
  - 1. defaults in the payment of a rent payment or water or sewer payment or other charge and such default continues for ten (10) days after written notice thereof; or
  - 2. defaults in the performance or observance of any other of the Lessee's covenants, agreements or obligations under the Lease and fails to correct such default within thirty (30) days after written notice thereof; or
  - 3. shall be declared bankrupt or insolvent according to law, or if any assignment shall be made of Lessee's property for the benefit of creditors; or
  - 4. fails to secure an occupancy permit within 24 months from the date the Lease is executed.
- F. The Lessee shall not assign its proposal, the Lease Agreement, nor its rights, nor shall the Lessee sublet any or all of the Leased Premises without the prior written consent of the City Council (2/3 vote) and Mayor. Such subletting may only be authorized, in the sole discretion of the City Council and Mayor, for a use that is compatible with the public purpose and identified allowed uses of this Request for Proposal.
- G. The Lessee shall be required to purchase and maintain fire insurance in the amount of one million dollars (\$1,000,000) and comprehensive public liability insurance in the amount of one million dollars (\$1,000,000) per person/one million dollars (\$1,000,000) per occurrence, with excess liability/umbrella coverage in the amount of

three million dollars (\$3,000,000); and with property damage insurance in limits of one million dollars (\$1,000,000) with responsible companies qualified to do business in Massachusetts and in good standing therein insuring the Lessor as well as the Lessee against injury to persons or damage to property as provided and to be in effect during the entire Lease term. Lessee shall also be required to purchase and maintain Vehicle Liability insurance and Worker's Compensation insurance for any vehicles or employees as required by Massachusetts law.

- H. The Lessee shall be required to present a Certificate of Insurance, identifying the City as a named additional insured and requiring 30 days advance notice of any cancellation, to the Lessor, at the time of the signing of the Lease and at such other times as the Lessor shall request. The Lessee shall be responsible for the payment of all required premiums to maintain said insurance during the entire Lease term.
- I. The Lessee shall indemnify, defend, and hold the City harmless from and against any and all claims, demands, liabilities, actions, causes of actions, defenses, proceedings, subpoenas, document requests and/or costs and expenses, including attorney's fees (collectively the "Claims"), brought against or initiated as to the City, its agents, departments, officials, employees, insurers and/or successors, by any third party, including any private or public entity, arising from or relating to the Lessee's use of the Leased Premises. Such indemnification shall include, but shall not be limited to, all reasonable fees and reasonable costs of attorneys and consultants, of the City's choosing incurred in defending or responding to such Claims, except such Claims as are the result of the City's gross negligence or intentional malfeasance.
- J. The Lessee shall purchase and maintain tenant's insurance in an amount sufficient to replace Lessee's personal belongings contained in the Leased Premises during the Lease term and shall be required to present a Certificate of Insurance identifying the City as a co-insured and requiring thirty (30) days advance notice of any cancellation to the Lessor at the time of the signing of the Lease and

at such other times as the Lessor shall request. The Lessee shall be required to keep the list updated for insurance purposes as items come in and out of the Leased Premises.

- K. The Lessee shall be responsible for complying with the Building Code in order to secure an Occupancy Permit.
- L. The Lessee shall perform all improvements regarding tenant fit up at its sole cost and expense.
- M. The use of the subject property is subject to the Zoning Ordinances of the City of Waltham and subject to Section III above. See the attached Table of Uses for uses that are allowed as-of-right in Conservation/Recreation Zoning District in which the property is located.
- N. Lessee's plans must be submitted to and approved by the Waltham Historical Commission for any items within its jurisdiction; and then by the Massachusetts Historical Commission, prior to submission to the Building Department for a building permit(s).
- O. All plans and specifications for improvements to the property must be approved by the Building Inspector of the City of Waltham prior to commencement of any work.
- P. All improvements shall be performed by the Lessee in accordance with the City-approved plans and specifications.
- Q. No additions may be made to the exterior of the building and alterations to the exterior and interior of the building and land require the prior written approval of the City Council and Mayor. Lessee will be allowed two exterior signs subject to the approval of the City Council and Mayor.
- R. Over the term of the Lease, the Lessee shall be required to maintain the exterior and interior of the building and parking area and make any necessary repairs thereto and keep the Leased Premises safe for public admittance.
- S. The Lessee shall be responsible for the cost of installing and using all utilities to the property. Lessee is responsible for its own air conditioning needs.

- T. The Lessee shall be responsible for all custodial/janitorial services for the Leased Premises during the Lease term
- U. The Lessee shall be responsible for shoveling all walkways, parking lots and driveways into the Leased Premises and ensuring that all exits and entrances are not obstructed.
- V. The Lessee shall be responsible for maintaining the Leased Premises in good condition, reasonable wear and tear excluded.
- W. The Lessee shall be responsible for the cost of all repairs occasioned by or due to the fault or neglect of the Lessee, its agents, servants or independent contractors hired by it, visitors, guests, invitees, or any other source.
- X. The Lessee is prohibited from any activity that would constitute a violation of the Conflict-of-Interest Law (M.G.L. c. 268A).
- Y. The Lessee will be required to execute a Lease with the City of Waltham. The City's Lease, along with this RFP and the Lessee's response thereto, if accepted by the City, shall constitute the entire agreement for the Lease of the property. Any amendment to the Lease must be in writing and must be approved in the same manner as the original Lease, by both the City Council (2/3 vote) and Mayor.
- Z. The Lessee shall be responsible for securing all municipal, state and federal permits, including but not necessarily limited to building, occupancy health and licensure permits.
- AA. The Lessee is obligated to secure an occupancy permit within twenty-four months of the date on which the Lease is executed, unless extended by written agreement of the parties. As noted above, the Lessee will be taking the building "AS IS" and the Lessee will be responsible for taking all actions necessary to secure an occupancy permit.
- BB. The Lessor shall be responsible for delineating the parking spaces on the ground, including handicapped parking spaces, which parking spaces shall be sized and located in accordance with the requirements of the Zoning Ordinance.

- CC. The Lessee shall use the property in such manner as is compatible with the neighborhood and/or the allowed use(s) of the building and land as determined in sole discretion of the City.
- DD. Lessee agrees to execute any documents necessary to effectuate the Lease of the property.
- EE. Lessee will be required to provide CORI checks where required by Massachusetts law. Lessee will have the responsibility of supervising or ensuring that activities are supervised during the Lease term.
- FF. Lessee will be required to implement a safety plan for the Leased Premises.
- GG. All obligations of the Lessee shall be performed at its sole cost and expense.
- HH. It is the intention that all of the units be included in the Subsidized Housing inventory for Waltham maintained by DHCD and that the acreage of the parcel be counted in the numerator of the 1.5% calculation for the minimum land area safe harbor.
- II. During the initial lease-up period, Waltham residents who properly apply for an apartment and who meet all qualification requirements for acceptance shall receive a preference for up to 70% of the apartments to the extent permitted under State and Federal Fair Housing Laws.

## **V. Submission Requirements**

In addition to Articles I, II, III and IV, incorporated herein by reference, Submission Requirements are:

- A. All proposals must be delivered to the office of the City Purchasing Agent Crystal Philpott, City Hall, 610 Main Street, Waltham, MA no later than **Wednesday June 11<sup>th</sup>, 2024 at 10:00AM.**
- B. All proposals (four copies) shall be in sealed envelopes marked, "Proposal for Lease of Tarbell Hall, 190 Trapelo Road, Waltham"
- C. All proposals not received at the Purchasing Agent's office by the date and time specified shall be rejected.

- D. Each proposal must include the following:
1. A completed Disclosure of Beneficial Interests form, which complies with the requirements of M.G.L. Chapter 7C, Section 38. During the Lease term a new disclosure must be filed within thirty (30) days of any change in beneficial interests.
  2. A signed affidavit of non-collusion in the form provided by the Purchasing Agent.
  3. A certification of tax compliance (M.G.L. Chapter 62C, Section 49A).
  4. If the Lessee is other than a natural person, evidence of its legal existence and status, including any recent amendments thereto. Such evidence may include the following:
    - a. Articles of Incorporation
    - b. Trust Agreements
    - c. Partnership Agreements
  5. If the proposer is a corporation, a Certificate of Authority conveying a certified vote of the Board of Directors authorizing a designated individual to submit the proposal. If the proposer is an LLC, complete the Certificate of Authority for an LLC provided.
  6. A statement of the intended use of the Leased Premises and how it preserves the historic nature of the building, provides affordable housing for families and does not harm or derogate the surrounding neighborhoods.
  7. Resumes and position descriptions of all personnel of Lessee who will be responsible for supervising construction work or work to be performed under the Lease and the operation of affordable housing for families.
  8. A statement of the amount of rent the Lessee proposes to pay over the course of the Lease term and the specific Lease term requested.
  9. Evidence of the proposer's ability to cover costs of all rent to be paid, utilities to be paid including water and sewer charges, all capital improvements to be made, and all other financial obligations relating to the rental of the property during the entire rental period. Evidence of Lessee's ability to enter into a Lease and to pay the rental price,



including support letter(s) from a financial institution licensed to do business within the Commonwealth of Massachusetts and copies of the Proposer's 990-PFs for the last two years or Proposer's corporate income tax returns for the last two years.

10. A proposed, detailed program of capital repairs and replacements, any other improvements/repairs proposed. Said program shall be attached to and become part of the Lease. Lessee is also to include a financing plan for such improvements/repairs.

11. A list of past projects in which the proposer has been involved.

12. A written inventory of any and all personal property that will be stored or maintained in or on the Leased Premises. Such list shall be updated by the Lessee as such personal property is added or removed.

13. For a corporation, a certified copy of the most recent Annual Report and any Amendments subsequent to the most recent filing as recorded with the Secretary of State.

14. The Lessee shall be responsible for maintaining its own insurance covering any personal property located on or in the rental property during the Lease term and the Lessee shall indemnify and hold the City harmless from any claims for damages or loss relating to any such personal property.

15. Insurance Certificate showing the requested limits and with the following text in the Description of Service Box: "The City of Waltham is a Named Additional Insured for General Liability, Fire, Property Damage".

16. The Lessee will be responsible for submitting a safety plan for the Leased Premises.

17. Lessor agrees to cooperate with Lessee's financing efforts.

18. The City reserves the right to request additional documentation and may independently verify information provided, including by independent audit.

## **VI Evaluation Criteria**

All proposals shall be evaluated based upon the following criteria:

A. Submission Requirements: All proposals must be properly submitted and contain all of the completed documents and forms as set forth in V- Submission Requirements. The Purchasing Agent shall determine if the Submission Requirements have been satisfied. The Purchasing Agent shall refer all proposals that meet the Submission Requirements to the Evaluation Committee, as expanded upon below in VI B. Any proposal which does not contain all the completed documents and forms set forth in Section V- Submission Requirements, shall be rejected.

B. Comparative Evaluation Criteria: An Evaluation Committee, consisting of one representative from each the Building Department, Planning Department and Maintenance Department will evaluate all proposals referred to it by the Purchasing Agent. The Evaluation Committee's review will be based upon the relative merits of the proposals in terms of proposed improvements and proposed use. The Evaluation Committee review will be based on the relative merits of the proposals in terms of:

1. Proposed Use (33 1/3% of total points) Each proposal shall be given a score of 1 to 5 (with 5 being the highest score) based upon the extent and how the proposal provides truly affordable housing for families.
2. Proposed Improvements (66 2/3% of total points) Each proposal shall be given a score of 1 to 5 (with 5 being the highest score) for the physical improvements made to the interior and exterior of the building and grounds. Responses to the RFP should delineate exactly what improvements will be done and when.

C. Evaluation: Once points are established for the proposed use and proposed improvements, the Evaluation Committee will weigh these criteria as listed above. Based upon the final scores assigned to each proposal, the Evaluation Committee shall make its recommendation to the Mayor and City Council of the City of Waltham who shall identify the most advantageous proposal.

## **VII Award**

Lease between the City and the successful respondent is subject to the approval of both the Mayor and the City Council (2/3 vote).

## **VIII Miscellaneous**

- A. The City reserves the right to reject any and all proposals at any time prior to the execution of the Lease.
- B. All renovations become fixtures and the property of the City of Waltham.
- C. The City of Waltham will conduct one PRE-PROPOSAL site visit of the property on **Wednesday April 17<sup>th</sup>, 2024 at 10:00AM.**

Interested parties should meet at the Waverly Oaks Rd. entrance on said date and time. This will be the only opportunity to conduct a detailed inspection of the property before the RFP due date.

- D. All questions regarding the RFP should be submitted in writing to the Purchasing Agent who will respond via addenda to all interested parties. Addenda will also be posted on the City's website. Last day for written questions: **Wednesday May 1<sup>st</sup>, 2024 by Noon** to [cphilpott@city.waltham.ma.us](mailto:cphilpott@city.waltham.ma.us).

**QUESTIONS SHOULD NOT BE SUBMITTED TO CITY COUNCILLORS, NOR THE MAYOR, AS THE RFP PROCESS REQUIRES A SEALED BID PROPOSAL FROM ALL BIDDERS. THE MAYOR AND COUNCILLORS ARE SUBJECT TO THE MASSACHUSETTS CONFLICT OF INTEREST LAW AND CANNOT ADVOCATE FOR ANY PRIVATE PARTY WHERE THE CITY HAS AN INTEREST.**

## Central Register- Acquisition or Disposition of Real Property

### Authority:

Crystal Philpott  
Purchasing Agent  
City of Waltham  
610 Main Street  
Waltham, MA  
(781) 314-3244

### Description of Property:

190 Trapelo Road, Waltham, MA  
Tarbell Hall @ former Fernald School  
38,924 square feet brick building  
4 stories plus basement interior space

### Proposal Deadline:

**Wednesday June 11<sup>th</sup>, 2024, 10:00AM**

### Estimated Value, Source of Valuation

**FY24 Assessed Value: \$2,843,100**

### Tarbell

Built: 1934  
4 story, 44,087 gross SF, 38,924 living SF  
86 room, 30 bath  
Use: Affordable housing- families

### Market rents:

1 bedroom: \$3,020  
2 bedroom: \$3,550  
3 bedroom: \$4,250

### Affordable units:

	80% AMI	60% AMI
1 bedroom:	\$2,073.75	\$1,558.50
2 bedroom:	\$2,370.00	\$1,782.00
3 bedroom:	\$2,961.25	\$2,226.00

### Additional Information:

See attached Assessor's Card

The City plans to lease the entire building for affordable family housing, and for a use that preserves the historic building. The building is leased "AS IS". Open Air Parking will be available.

Copies of the Request for Proposals are available at:

<https://www.city.waltham.ma.us/category/tags/purchasing-bids-open-0>

**The City reserves the right to reject any and all proposals.**

Map Building Location 190 TRAPELO RD

APPRaised: 2,843,100 / Total Card 2,843,100 / Total Parcel 72,202,700  
 USE + IMP: 2,843,100 / USE + IMP: 2,843,100 / USE + IMP: 2,843,100 /  
 ASSESSED: 2,843,100 / ASSESSED: 2,843,100 / ASSESSED: 2,843,100 /  
 USE LAND: 0 / USE LAND: 0 / USE LAND: 0 /  
 Total Parcel 72,202,700

Property Location			
No.	Alt No.	Direction/Street/City	Unit #
190	0	TRAPELO RD, WALTHAM	

Ownership			
Owner 1	City/Of	Street	
CITY OF WALTHAM		610 MAIN ST	

Town/City			
SI/Prov	MA	WALTHAM	

Postal			
Country	State	City	Zip
	MA	WALTHAM	02452

Exterior Information			
Type	Code	Description	Notes
86 - DORMITORY			

Bath Features			
Full Bath	3/4 Bath	1/2 Bath	Other Fix
20	0	6	0

Other Features			
Kitchen	Fireplace	W/Flues	Other
3	0	0	

Condo Information			
Location	Total Units	Floor	% Own
01 - DRYWALL	0		

Interior Information			
Prime Int Wall	Sec Int Wall	Partion	Prim Floors
01 - DRYWALL	0		

Calc Summary			
Basic \$ / SQ	Size Adj	Const Adj	Adj \$ / SQ
140.00	0.84	0.95	111.80

Basement Floors			
Subfloor	Basement Garage	Electric	Insulation
	0	03 - TYPICAL	01 - TYPICAL

Heat Type			
Heat Fuel	Heat Type	# Heat Sys	% Heated
01 - OIL	05 - STEAM	1.00	100%

Solar HW			
Chr/Vac	% Sprinkled	% Com Wall	Total
0	0		2,843,059.80

SPYI (First 5 Lines)			
Code	Description	Qual	Con Year
903	MUNICIPAL		

Land Section (First 5 Lines)			
Code	Description	Fac	Units
903	MUNICIPAL		1,000

Total Yard Items			
Code	Description	Fac	Units
			156,600

In Process Appraisal Summary (First 4 Lines Only)			
Use Code	Land Size	Building Value	Yard Items
903	0.0000	2,843,100	0

Previous Assessment (First 3 Lines Only)			
Tax Year	Assessment Code	Land Value	Yard Value
2025	MUNICIPAL	72,202,700	0

Sales Information (Last 3 Sales Only)			
Grantor	Legal Ref	Date	Sale Price
COMM. OF MASS	64707-427	12/23/2014	3,700,000

Building Permits (Last 3 Permits Only)			
Date	Description	Amount	Last Visit

Remodeling			
Exterior	Interior	Additions	Kitchens

General Information			
Grade	C - AVERAGE	Year Bld	1934

Depreciation			
Phys Cond	AV - Averged	30%	Functional

Sub Area			
Code	Description	Area - SQFT	Rate - AV
BMT	BASEMENT	8,120	27.95

Sub Area Detail			
Sub Area	% Usable	Description	All Type %

Sub Area			
Code	Description	Area - SQFT	Rate - AV
BMT	BASEMENT	8,120	27.95

Sub Area			
Code	Description	Area - SQFT	Rate - AV
BMT	BASEMENT	8,120	27.95

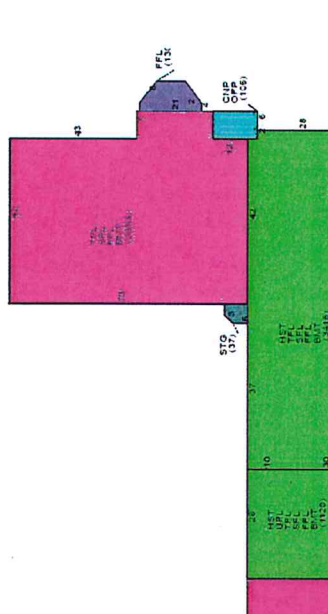
Sub Area			
Code	Description	Area - SQFT	Rate - AV
BMT	BASEMENT	8,120	27.95

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BMT	BASEMENT	8,120	27.95

Sub Area			
Code	Description	Area - SQFT	Rate - AV
BMT	BASEMENT	8,120	27.95

Sub Area			
Code	Description	Area - SQFT	Rate - AV
BMT	BASEMENT	8,120	27.95

Disclaimer: This information is believed to be correct but is subject to change and is not guaranteed



Remodeling			
Exterior	Interior	Additions	Kitchens

Sub Area			
Code	Description	Area - SQFT	Rate - AV
BMT	BASEMENT	8,120	27.95

CITY OF WALTHAM, MASSACHUSETTS  
REQUEST FOR PROPOSALS  
PROPERTY FOR LEASE

SEALED PROPOSALS for leasing the Tarbell Hall (38,924 sq. ft.) located at the former Fernald School, 190 Trapelo Road, Waltham, MA, will be received at the office of the Purchasing Agent, City Hall, 610 Main Street, Waltham, MA 02452 until **Wednesday June 11<sup>th</sup>, 2024 at 10:00AM** at which time they will be opened publicly via Zoom, recorded and distributed to the Evaluation Committee.

A property inspection date is set for

**Wednesday April 17<sup>th</sup>, 2024 at 10:00AM** Interested parties should meet at the Waverly Oaks Rd. entrance.

Copies of the Requests for Proposals are available at:

<https://www.city.waltham.ma.us/category/tags/purchasing-bids-open-0>

**The City reserves the right to reject any and all proposals.**

Crystal Philpott, MCPPO  
Purchasing Agent  
781 314-3244  
cphilpott@city.waltham.ma.us

Advertisement

# EXHIBITS

**DISCLOSURE STATEMENT FOR  
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY  
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

**INSTRUCTION SHEET**

**NOTE:** The Division of Capital Asset Management and Maintenance (DCAMM) shall have no responsibility for insuring that the Disclosure Statement has been properly completed as required by law. Acceptance by DCAMM of a Disclosure Statement for filing does not constitute DCAMM's approval of this Disclosure Statement or the information contained therein. Please carefully read M.G.L. c. 7C, s. 38 which is reprinted in Section 8 of this Disclosure Statement.

**Section (1):** Identify the real property, including its street address, and city or town. If there is no street address then identify the property in some other manner such as the nearest cross street and its tax assessors' parcel number.

**Section (2):** Identify the type of transaction to which this Disclosure Statement pertains –such as a sale, purchase, lease, etc.

**Section (3):** Insert the exact legal name of the Public Agency participating in this Transaction with the Disclosing Party. The Public Agency may be a Department of the Commonwealth of Massachusetts, or some other public entity. Please do not abbreviate.

**Section (4):** Insert the exact legal name of the Disclosing Party. Indicate whether the Disclosing Party is an individual, tenants in common, tenants by the entirety, corporation, general partnership, limited partnership, LLC, or other entity. If the Disclosing Party is the trustees of a trust then identify the trustees by name, indicate that they are trustees, and add the name of the trust.

**Section (5):** Indicate the role of the Disclosing Party in the transaction by checking one of the blanks. If the Disclosing Party's role in the transaction is not covered by one of the listed roles then describe the role in words.

**Section (6):** List the names and addresses of every legal entity and every natural person that has or will have a direct or indirect beneficial interest in the real property. The only exceptions are those stated in the first paragraph of the statute that is reprinted in Section 8 of this Disclosure Statement. If the Disclosing Party is another public entity such as a city or town, insert "inhabitants of the (name of public entity)." If the Disclosing Party is a non-profit with no individual persons having any beneficial interest then indicate the purpose or type of the non-profit entity. If additional space is needed, please attach a separate sheet and incorporate it by reference into Section 6.

**Section (7):** Check "NONE" in the box if none of the persons mentioned in Section 6 is employed by DCAMM or an official elected to public office in the Commonwealth of Massachusetts. Otherwise list any parties disclosed in Section 6 that are employees of DCAMM or an official elected to public office.

**Section (8):** The individual signing this statement on behalf of the Disclosing Party acknowledges that he/she has read the included provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts.

**Section (9):** Make sure that this Disclosure Statement is signed by all required parties. If the Disclosing Party is a corporation, please make sure that this Disclosure Statement is signed by a duly authorized officer of the corporation as required by the statute reprinted in Section 8 of this Disclosure Statement.

DCAMM's acceptance of a statement for filing does not signify any opinion by DCAMM that the statement complies with applicable law.

This completed and signed Disclosure Statement should be mailed or otherwise delivered to:

Deputy Commissioner for Real Estate  
Division of Capital Asset Management and Maintenance  
One Ashburton Place, 15<sup>th</sup> Floor, Boston, MA 02108



**DISCLOSURE STATEMENT FOR  
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY  
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

The undersigned party to a real property transaction with a public agency hereby discloses and certifies, under pains and penalties of perjury, the following information as required by law:

- (1) REAL PROPERTY:
  
- (2) TYPE OF TRANSACTION, AGREEMENT, or DOCUMENT:
  
- (3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:
  
- (4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY:
  
- (5) ROLE OF DISCLOSING PARTY (Check appropriate role):

Lessor/Landlord                       Lessee/Tenant  
 Seller/Grantor                          Buyer/Grantee  
 Other (Please describe): \_\_\_\_\_

(6) The names and addresses of all persons and individuals who have or will have a direct or indirect beneficial interest in the real property excluding only 1) a stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation or 2) an owner of a time share that has an interest in a leasehold condominium meeting all of the conditions specified in M.G.L. c. 7C, s. 38, are hereby disclosed as follows (attach additional pages if necessary):

<u>NAME</u>	<u>RESIDENCE</u>
_____	_____
_____	_____

(7) None of the above- named persons is an employee of the Division of Capital Asset Management and Maintenance or an official elected to public office in the Commonwealth of Massachusetts, except as listed below (Check "NONE" if NONE):

NONE

<u>NAME:</u>	<u>POSITION:</u>
_____	_____
_____	_____
_____	_____

**DISCLOSURE STATEMENT FOR  
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY  
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

- (8) The individual signing this statement on behalf of the above-named party acknowledges that he/she has read the following provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts:

*No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and time-shares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arms length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.*

*Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify the state ethics commission of such names, and shall make copies of any and all disclosure statements received available to the state ethics commission upon request.*

*The commissioner shall keep a copy of each disclosure statement received available for public inspection during regular business hours.*

- (9) This Disclosure Statement is hereby signed under penalties of perjury.

\_\_\_\_\_  
PRINT NAME OF DISCLOSING PARTY (from Section 4, above)

\_\_\_\_\_  
AUTHORIZED SIGNATURE of DISCLOSING PARTY      DATE (MM / DD / YYYY)

\_\_\_\_\_  
PRINT NAME & TITLE of AUTHORIZED SIGNER

# CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals. The undersigned certifies that no representations made by any City officials, employees, entity, or group of individuals other than the Purchasing Agent of the City of Waltham was relied upon in the making of this bid

\_\_\_\_\_  
(Signature of person signing bid or proposal)      Date

\_\_\_\_\_  
(Name of business)

## I. TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, & 49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Signature of person submitting bid or proposal      Date

\_\_\_\_\_  
Name of business

### **NOTE**

**Failure to submit any of the required documents, in this or in other sections, with your bid response package will be cause for the disqualification of your company.**

**CERTIFICATE OF VOTE OF AUTHORIZATION**

Date:

I \_\_\_\_\_, Clerk of \_\_\_\_\_ (corporation) hereby certify that at a meeting of the Board of Directors of said Corporation duly held on the \_\_\_\_\_ day of \_\_\_\_\_ at which time a quorum was present and voting throughout, the following vote was duly passed and is now in full force and effect:

VOTED: That \_\_\_\_\_ (name) is hereby authorized, directed and empowered for the name and on behalf of this Corporation to sign, seal with the corporate seal, execute, acknowledge and deliver all contracts and other obligations of this Corporation; the execution of any such contract or obligation to be valid and binding upon this Corporation for all purposes, and that this vote shall remain in full force and effect unless and until the same has been altered, amended or revoked by a subsequent vote of such directors and a certificate of such later vote attested by the Clerk of this Corporation.

I further certify that \_\_\_\_\_ is duly elected/appointed \_\_\_\_\_ of said corporation.

SIGNED:

(Corporate Seal)

\_\_\_\_\_  
Clerk of the Corporation:

Print Name: \_\_\_\_\_

**COMMONWEALTH OF MASSACHUSETTS**

County of \_\_\_\_\_,

Date:

Then personally appeared the above named and acknowledged the foregoing instrument to be their free act and deed before me, \_\_\_\_\_

Notary Public;

My Commission expires:

## CORPORATION IDENTIFICATION

The bidder for the information of the Awarding Authority furnishes the following information.

If a Corporation:

Incorporated in what state \_\_\_\_\_

President \_\_\_\_\_

Treasurer \_\_\_\_\_

Secretary \_\_\_\_\_

Federal ID Number \_\_\_\_\_ (Required)

If a foreign (out of State) Corporation – Are you registered to do business in Massachusetts? Yes

\_\_\_\_\_, No \_\_\_\_\_

If you are selected for this work you are required under M.G.L.ch. 30S, 39L to obtain from the Secretary of State, Foreign Corp. Section, State House, Boston, a certificate stating that you Corporation is registered, and furnish said certificate to the Awarding Authority prior to the award.

If a Partnership: (Name all partners)

Name of partner \_\_\_\_\_

Residence \_\_\_\_\_

Name of partner \_\_\_\_\_

Residence \_\_\_\_\_

If an Individual:

Name \_\_\_\_\_

Residence \_\_\_\_\_

If an Individual doing business under a firm name:

Name of Firm \_\_\_\_\_

Name of Individual \_\_\_\_\_

Business Address \_\_\_\_\_

Residence \_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_  
Name of Bidder

By \_\_\_\_\_

Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Business Address (POST OFFICE BOX NUMBER NOT ACCEPTABLE)

\_\_\_\_\_  
City State

\_\_\_\_\_  
Telephone Number,

\_\_\_\_\_  
Date

**NOTE (1): This proposal must bear the written signature of the bidder. If the bidder is a partnership, a partner must sign the proposal. If the bidder is a corporation, a duly authorized officer or agent of such corporation must sign the proposal.**  
**NOTE (2): Failure to submit any of the required documents, in this or in other sections, with your bid response package will be cause for the disqualification of your company.**

(Fill out if an LLC)

**CERTIFICATE OF AUTHORITY LIMITED LIABILITY  
COMPANY**

The **undersigned**, being (a/the) duly elected, qualified and active (member/ manager) of \_\_\_\_\_,  
a Massachusetts limited Liability Company (hereinafter "the Company")

**Does Hereby Certify that:**

1. The Articles of Organization of the Company were duly filed with the Office of the Secretary of State of the State of Massachusetts on \_\_\_\_\_ and the Articles of Organization have not been (further) amended..
2. The Company has complied with the publication requirements contained in Section 67 of the Limited Liability Company Law.
3. There exists an Operating Agreement of the Company and that the said Operating Agreement has not been amended or repealed and that the said Operating Agreement remains in full force and effect as of this date.
4. Neither the Articles of Organization nor the Operating Agreement (as amended) require any further act to be taken or a meeting to be held by its members other than as follows:
5. All said requirements, whether as contained in the Articles of Organization or in the Operating Agreement or by operation of law as to the transaction of \_\_\_\_\_, 20\_\_\_\_ have been met.
6. The following person or persons has/have been duly authorized by the Company to execute all documents in connection with said transaction and that the signature appearing to the right of their name(s) is his/her genuine signature.

NAME	OFFICE HELD	SIGNATURE
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**IN Witness Whereof**, the undersigned has executed this Certificate of Authority this

\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
(Signature)

STATE OF MASSACHUSETTS, COUNTY OF \_\_\_\_\_

On the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_ , before me, the undersigned personally appeared \_\_\_\_\_, personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is (are) subscribed to the within instrument and acknowledged to me that he/she/ they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s), or the person upon behalf of which the individual(s) acted, executed the instrument.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

Notary Stamp:

**DEBARMENT CERTIFICATION**

In connection with this bid and all procurement transactions, by signature thereon, the respondent certifies that neither the company nor its principals are suspended, debarred, proposed for debarment, declared ineligible, or voluntarily excluded from the award of contracts, procurement or non procurement programs from the Commonwealth of Massachusetts, the US Federal Government and/or the City of Waltham. "Principals" means officers, directors, owners, partners and persons having primary interest, management or supervisory responsibilities with the business entity. Vendors shall provide immediate written notification to the Purchasing Agent of the City of Waltham at any time during the period of the contract of prior to the contract award if the vendor learns of any changed condition with regards to the debarment of the company or its officers. This certification is a material representation of fact upon which reliance will be placed when making the business award. If at any time it is determined that the vendor knowingly misrepresented this certification, in addition to other legal remedies available to the City of Waltham, the contract will be cancelled and the award revoked.

---

Company Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_, State \_\_\_\_\_, Zip Code \_\_\_\_\_

Phone Number (\_\_\_\_) \_\_\_\_\_

E-Mail Address \_\_\_\_\_

**Signed by Authorized Company Representative:**

\_\_\_\_\_

Print name \_\_\_\_\_

Date \_\_\_\_\_



**PROVIDE THREE (3) SERVICE APPROPRIATE REFERENCES**

1. Company Name:

Address:

Contact Name:

Phone #

Type of service/product provided to this Company:

Dollar value of service provided to this Company:

2. Company Name:

Address:

Contact Name:

Phone #

Type of service/product provided to this Company:

Dollar value of service provided to this Company:

3. Company Name:

Address:

Contact Name:

Phone #

Type of service/product provided to this Company:

Dollar value of service provided to this Company:

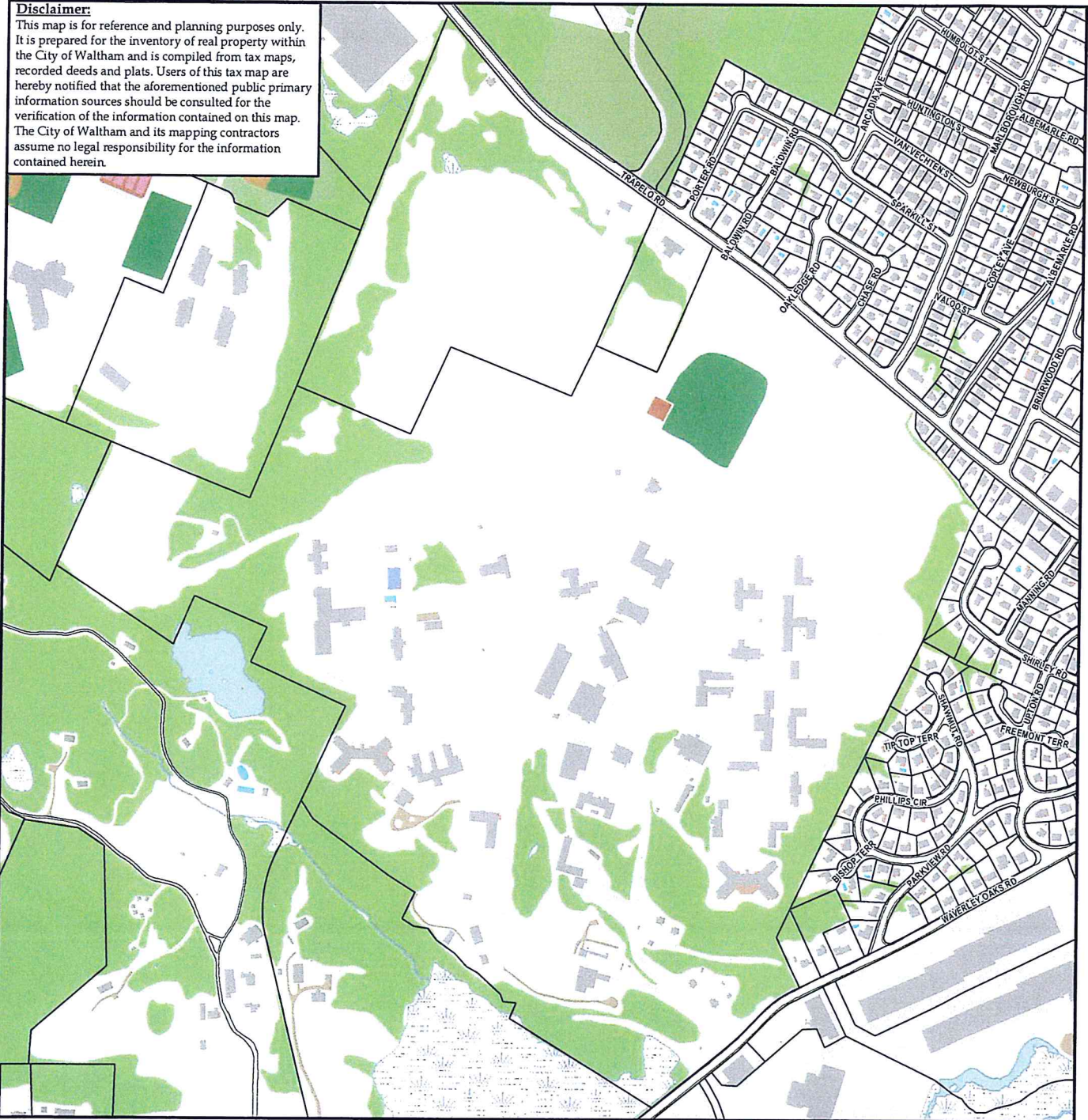
**NOTE**

**Failure to submit any of the required documents, in this or in other sections, with your bid response package will be cause for the disqualification of your company.**

**APPENDIX A  
SITE PLANS**

**Disclaimer:**  
 This map is for reference and planning purposes only. It is prepared for the inventory of real property within the City of Waltham and is compiled from tax maps, recorded deeds and plats. Users of this tax map are hereby notified that the aforementioned public primary information sources should be consulted for the verification of the information contained on this map. The City of Waltham and its mapping contractors assume no legal responsibility for the information contained herein.

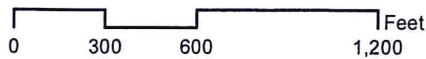
Document Path: G:\Maps\Mayors Office\Fernald Center - Letter Size.mxd



**Legend**

- Building Footprint
- Deck
- Paved
- Unpaved
- Trees
- Parcel Lines
- Swimming Pools
- Water Bodies
- Upland
- Wetland
- Park

**Source:**  
 The digital planimetric base map data were developed by Chas H Sells, Inc. and are updated using spring 2023 1"= 40' scale color orthophotographs. Parcel data are current as of 1/1/2024. Map prepared by City of Waltham GIS.



1 inch = 600 feet

# Fernald Center City of Waltham Massachusetts



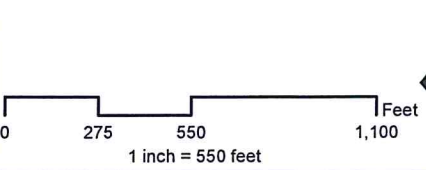
**Legend**

- Stream
- Non-CPA Buildings
- CPA Parcels
- Non-CPA Parcels
- Year Built**
- Pre-1900
- 1900-1919
- 1920-1939
- 1940-1969
- 1970-1979
- Post 1980
- Vegetated Area
- Parcel Lines
- Swimming Pools
- Paved Area
- Unpaved Area
- Water Bodies
- Upland
- Wetland Area
- Park

**Parcel 1 - CPA (Excluding Greene Pool/Gymnasium and Marquadt Nursing Center)**  
 Area in Square Feet: 6,085,322  
 Area in Acres: 139.7

**Parcel 2 - Non-CPA**  
 Area in Square Feet: 2,168,852.4  
 Area in Acres: 49.79

**Source:**  
 The digital planimetric 1"=40' scale base map data were developed by Charles H Sells, Inc. and are derived from 0.5' pixel color orthophotographs taken during the spring of 2015. Parcel data is current as of January 1, 2020.



**Fernald Center Master Plan**



**Legend**

Non-CPA Buildings	Vegetated Area
Stream	Parcel Lines
CPA Parcels	Swimming Pools
Non-CPA Parcels	Paved Area
<b>Year Built</b>	Unpaved Area
Pre-1900	Water Bodies
1900-1919	Upland
1920-1939	Wetland Area
1940-1969	Park
1970-1979	

**Parcel 1 - CPA (Excluding Greene Pool/Gymnasium and Marquadt Nursing Center)**  
 Area in Square Feet: 4,530,304.17  
 Area in Acres: 104.00

**Parcel 2A-1 - CPA**  
 Area in Square Feet: 662,516.98  
 Area in Acres: 15.20

**Parcel 2A-2 - CPA**  
 Area in Square Feet: 299,717.36  
 Area in Acres: 6.88

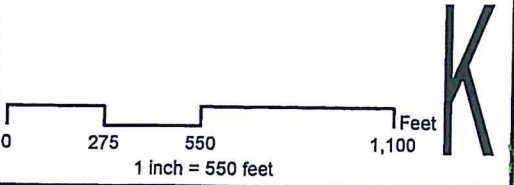
**Parcel 2B - CPA**  
 Area in Square Feet: 598,513.4  
 Area in Acres: 13.74 Acres

**Parcel 3A - Non-CPA**  
 Area in Square Feet: 993,337.07  
 Area in Acres: 22.80 Acres

**Parcel 3B - Non-CPA**  
 Area in Square Feet: 1,170,779.17  
 Area in Acres: 26.87 Acres

Document Path: G:\Maps\Fernald Master Plan - Letter Size 7-8-2022.mxd

**Source:**  
 The digital planimetric 1"=40' scale base map data were developed by Charles H Sells, Inc. and are derived from 0.5' pixel color orthophotographs taken during the spring of 2015. Parcel data is current as of January 1, 2020.



## Fernald Center Master Plan

Date: 7/8/2022

**APPENDIX B**  
**NATIONAL HISTORIC REGISTER**

United States Department of the Interior  
National Park Service

# National Register of Historic Places Registration Form

# COPY

This form is for use in nominating or requesting determinations for individual properties and districts. See instructions in *How to Complete the National Register of Historic Places Registration Form* (National Register Bulletin 16A). Complete each item by marking "x" in the appropriate box or entering the information requested. If an item does not apply to the property being documented, enter "N/A" for "not applicable." For functions, architectural classification, materials, and areas of significance, enter only categories and subcategories from the instructions. Place additional entries and narrative items on continuation sheets (NPS Form 10-900a). Use a typewriter, word processor, or computer, to complete all items.

### Name of Property

Historic name Mass. School for Idiotic & Feeble-Minded Youth

Other names/site number Walter E. Fernald State School (preferred)

### Location

Street & number 200 Trapelo Road

N/A  not for publication

City or town Waltham

N/A  vicinity

State Massachusetts code MA county Middlesex code 017 zip code 02154

### State/Federal Agency Certification

As the designated authority under the National Historic Preservation Act, as amended, I hereby certify that this  nomination  request for determination of eligibility meets the documentation standards for registering properties in the National Register of Historic Places and meets the procedural and professional requirements set forth in 36 CFR Part 60. In my opinion, the property  meets  does not meet the National Register criteria. I recommend that this property be considered significant  nationally  statewide  locally. ( See continuation sheet for additional comments.)

Signature of certifying official/Title Judith B. McDonough Date 12/8/93  
Judith B. McDonough Executive Director  
Massachusetts Historical Commission, State Historic Preservation Officer  
State of Federal agency and bureau

In my opinion, the property  meets  does not meet the National Register criteria. ( See continuation sheet for additional comments.)

Signature of certifying official/Title \_\_\_\_\_ Date \_\_\_\_\_

State or Federal agency and bureau \_\_\_\_\_

### National Park Service Certification

I certify that the property is: \_\_\_\_\_ Signature of the Keeper \_\_\_\_\_ Date of Action \_\_\_\_\_

entered in the National Register.  See continuation sheet.

determined eligible for the National Register.  See continuation sheet.

determined not eligible for the National Register.

removed from the National Register.

Other, (explain): \_\_\_\_\_

er E. Fernald State School  
Property

Middlesex County, MA  
County and State

**Classification**

**Number of Property**  
(as many boxes as apply)

**Category of Property**  
(Check only one box)

**Number of Resources within Property**  
(Do not include previously listed resources in the count.)

- private
- public-local
- public-State
- public-Federal

- building(s)
- district
- site
- structure
- object

Contributing	Noncontributing	
44	38	buildings
2		sites
2	4	structures
		objects
48	42	Total

**Number of related multiple property listing**  
(N/A if property is not part of a multiple property listing.)

**Number of contributing resources previously listed  
in the National Register**

Massachusetts State Hospitals & State Schools

0

**Function or Use**

**Current Functions**  
(Enter categories from instructions)

DOMESTIC: Institutional Housing

DOMESTIC: Institutional Housing

EDUCATION: Schoolhouse

EDUCATION: Schoolhouse

RELIGION: Chapel

RELIGION: Chapel

HEALTH CARE: Hospital, Medical Office

HEALTH CARE: Hospital, Medical Office

**Description**

**Architectural Classification**  
(Enter categories from instructions)

**Materials**  
(Enter categories from instructions)

19th: Greek Revival

foundation Stone, Concrete

Victorian: Queen Anne

walls Brick

/20th Revivals: Colonial Revival,

Wood - Shingle, Clapboard

Tudor Revival

roof Asphalt; Stone - Slate

/20th American: Craftsman

other

**Historic Description**

(Describe the historic and current condition of the property on one or more continuation sheets.)



8. Statement of Significance

Applicable National Register Criteria

(Mark "x" in one or more boxes for the criteria qualifying the property for National Register listing.)

- A Property is associated with events that have made a significant contribution to the broad patterns of our history.
B Property is associated with the lives of persons significant in our past.
C Property embodies the distinctive characteristics of a type, period, or method of construction or represents the work of a master, or possesses high artistic values, or represents a significant and distinguishable entity whose components lack individual distinction.
D Property has yielded, or is likely to yield, information important in prehistory or history.

Areas of Significance

(Enter categories from instructions)

Architecture

Health/Medicine

Social History

Period of Significance

1888 - 1940

Significant Dates

1848 - founding of school

1888 - move to present site

Significant Person

(Complete if Criterion B is marked above)

Samuel Gridley Howe

Cultural Affiliation

Edward Jarvis

Walter E. Fernald

Architect/Builder

William G. Preston, Clarence P. Hoyt

Criteria Considerations

Mark "x" in all the boxes that apply.)

Property is:

- A owned by a religious institution or used for religious purposes.
B removed from its original location.
C a birthplace or grave.
D a cemetery.
E a reconstructed building, object, or structure.
F a commemorative property.
G less than 50 years of age or achieved significance within the past 50 years.

Narrative Statement of Significance

(Explain the significance of the property on one or more continuation sheets.)

Major Bibliographical References

Bibliography

(List the books, articles, and other sources used in preparing this form on one or more continuation sheets.)

Previous documentation on file (NPS):

- preliminary determination of individual listing (36 CFR 67) has been requested
previously listed in the National Register
previously determined eligible by the National Register
designated a National Historic Landmark
recorded by Historic American Buildings Survey #
recorded by Historic American Engineering Record #

Primary location of additional data:

- State Historic Preservation Office
Other State agency
Federal agency
Local government
University
Other

Name of repository:

Massachusetts Historical Commission

ter E. Fernald State School

Middlesex County, MA

f Property

County and State

Geographical Data

ge of Property 180 acres

References

(Additional UTM references on a continuation sheet.)

9	3	1	8	0	2	0	4	6	9	6	0	8	0
Easting						Northing							
9	3	1	8	8	4	0	4	6	9	5	4	4	0

3	1	9	3	1	8	1	0	0	4	6	9	4	6	0	0
Zone			Easting			Northing									
4	1	9	3	1	7	2	6	0	4	6	9	5	3	6	0

See continuation sheet

Boundary Description

(Describe the boundaries of the property on a continuation sheet.)

Justification

(Explain why the boundaries were selected on a continuation sheet.)

Form Prepared By

Candace Jenkins, Preservation Consultant with Betsy Friedberg, National Register Director  
title

Organization Massachusetts Historical Commission date September 1993

Address & number 80 Boylston Street telephone (617) 727-8470

City town Boston state MA zip code 02116

Additional Documentation

List the following items with the completed form:

Continuation Sheets

A USGS map (7.5 or 15 minute series) indicating the property's location.

A Sketch map for historic districts and properties having large acreage or numerous resources.

Photographs

Representative black and white photographs of the property.

Additional Items

(List items with the SHPO or FPO for any additional items)

Property Owner

(Complete this item at the request of SHPO or FPO.)

Address & number telephone

City town state zip code

Work Reduction Act Statement: This information is being collected for applications to the National Register of Historic Places to nominate sites for listing or determine eligibility for listing, to list properties, and to amend existing listings. Response to this request is required to obtain fit in accordance with the National Historic Preservation Act, as amended (16 U.S.C. 470 et seq.).

Estimated Burden Statement: Public reporting burden for this form is estimated to average 18.1 hours per response including time for reviewing instructions, gathering and maintaining data, and completing and reviewing the form. Direct comments regarding this burden estimate or any aspect of the form to the Chief, Administrative Services Division, National Park Service, P.O. Box 37127, Washington, DC 20013-7127; and the Office of Management and Budget, Paperwork Reduction Projects (1024-0018), Washington, DC 20503.

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetSection number 7 Page 1Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

## DESCRIPTION

Location/Setting: The Walter E. Fernald State School occupies a compact 180-acre parcel of gently rolling terrain in Waltham near the Belmont (E) and Lexington (N) town lines. It is roughly bounded by Trapelo Road (N), Waverley Oaks Road (E), and Clematis Brook (S). Figure #1 shows the original extent of the site, which was purchased in 1887. State Route 2 runs north of the campus, while the Boston & Maine Railroad (MBTA commuter rail) is located to the southeast along Beaver Brook. In general, this suburban Boston area is densely developed with residential neighborhoods abutting the campus on the north and east, a light industrial area to the south on Waverley Oaks Road, and the Waverley Square commercial district a short distance to the east. Congestion is relieved by a major concentration of institutional uses including the Metropolitan District Commission's Beaver Brook Reservation (E), the Waltham Federal Center (W), Metropolitan State and Middlesex County Hospitals (NW), Bentley College (SW), and McLean Hospital (NE).

Landscape: The pleasant campus is ringed by low hills on the south, east, and west, which provide fine views for the perimeter buildings and leave the central area and the Trapelo Road frontage relatively flat. The main drive approaches from Trapelo Road on a straight course that runs between the hills. It provides access to buildings that perform campuswide functions like the Administration (#47), Central Food Service (#40), and Laundry (#22) buildings. Lateral roads curve up the hillsides to patient dormitories and nurses' residences. Typically, the rear drive from Waverley Oaks Road leads to the Power Plant (#14) and other support/maintenance buildings. Staff cottages are also located on a hillside in this area. There are no agricultural lands as there are at so many of the other campuses--the Templeton Colony (see form) was developed in 1899 to fulfill this function for the Fernald School. Hillsides are generally wooded while grassy areas between buildings are often devoted to playground use, reflecting Fernald's status as a state school rather than hospital.

As the second campus in the system to be built on the "cottage plan, it features freestanding buildings dating from the 1890s to the present that are dispersed over the entire area. The earliest annual reports stated that buildings would not be arrayed in checkerboard fashion, but would follow the contours of the land and be placed so as to allow southerly exposures for

(Continued)

United States Department of the Interior  
National Park Service

## National Register of Historic Places Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 7 Page 2

patient rooms. The oldest buildings occupy the east and south ridges. The most important remaining landscape features are the lawns (#8, #91) in front of Waverley Hall (#1), the original Administration Building, and the Activity Center (#3).

Buildings: Most are relatively small scale with an average height of two to three stories, and are constructed of red brick with sandstone trim. Few buildings, with the exception of the noncontributing Shriver Center of 1969 (#63), are visible from the two major roadways, Trapelo Road (N) and Waverley Oaks Road (E), which border the campus. The others include a trio of nineteenth-century houses on Trapelo Road (#45, 51, 53), two of which predate the campus.

The earliest buildings, dating from 1889-1910, are characterized by fieldstone foundations (probably dug and fashioned by patients) and red brick construction with sandstone trim. All were designed by noted Boston architect William Gibbons Preston. Stylistically, they reflect the Queen Anne style with Romanesque Revival or Craftsman overtones. They often display round-arched window and door openings, corbelled cornices, abundant decorative brickwork, and overhanging slate hip roofs with exposed rafter ends. Most are sited on the south and east ridges. Typically, they include dormitories for both patients and staff as well as Administration (#1), School (#4, 5), Manual Training (#10), Activity Center (#3), and Infirmary (#49). Another large group of buildings dating from the 1920s and 1930s are designed in the Colonial Revival style that dominated state hospital and school construction at that time. Patient dormitories from this period are generally interspersed with the earlier buildings on the campus perimeter, while buildings serving campuswide functions, such as the Administration Building (#47) and Food Service Building (#40), began to fill the central area. A group of single-family, wood-frame, Craftsman-style staff cottages were built at the rear entrance of the campus in 1925. The maintenance/utility group, which is also located at the rear entrance, dates primarily from the 1930s.

Another major building campaign of the 1960s added several large-scale buildings, including patient care facilities such as the 1969 Kelley Hall (#60) and the 1953 Greene Unit (#50), and research/evaluation facilities such as the 1969 Shriver Center (#63). The 1976 Cottage Complex (#64-79), consisting of one-story, mansard-roofed duplexes, represented a new approach to patient care that was followed up in the late 1980s with another

(Continued)

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetSection number 7 Page 3Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

group called Malone Park (#83-86); the Cottage Complex served as a precedent for similar developments at other school and hospital campuses.

Integrity: The historic integrity of the Fernald State School campus has been affected by substantial amounts of new construction and renovation. This is typical of the state schools that have been under court order to improve their facilities. Fortunately, this new construction has not resulted in demolition of historic buildings, so the early character of the institution remains clear. The only major loss was the building known as the Old Stone Farmhouse (figure #6). Most new construction has been confined to the campus perimeter, where it is often clustered and generally confined to one-story height. A major exception is the 1970s cottage colony, which sprawls over the formerly open lowlands that occupy the northwest quadrant of the campus. Some of the older buildings have been rehabilitated with exterior changes, including new window sash and handicap entrance ramps. A few, like West Building (#33), remain vacant and deteriorating. The landscape has been affected primarily by insertion of paved parking lots into former lawn areas.

Representative buildings are described below:

Pre-existing buildings:

#53: Cardinal Cottage (ca. 1850)

This is a three-by-three bay, gable-end, Greek Revival-style dwelling with a full fluted Doric portico across the south facade and a two-bay rear ell. It rises 2 1/2 stories from a granite block foundation to a gable roof with a wide, two-part entablature. It is sheathed with asbestos shingles. The entry is framed by sidelights, with full-length windows in adjacent bays. Elsewhere, windows contain late-nineteenth century 2/1 sash. A stone wall separates the house from Trapelo Road, and granite posts define the driveway.

#45: Baldwin Cottage, 180 Trapelo Road (ca. 1860)

Also sited on Trapelo Road, this two-by-three-bay, gable-end, Italianate-style dwelling is extended by a two-bay rear ell. It rises 2 1/2 stories from a brick foundation to a gable roof with cornice returns. It is sheathed with asbestos shingles. A porch with chamfered posts extends across the facade. Bay windows are located on the side elevations. Other windows contain 2/2 sash.

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 7 Page 4

Buildings from the 1890s

William Gibbons Preston is identified as the architect of most of these early buildings by drawings published in the annual reports, and in the Massachusetts State Archives collection. They are generally designed in the Queen Anne style with fieldstone foundations, red brick walls, and sandstone trim. Two of the earliest remaining institutional buildings, West and Belmont, are located on the southwest ridge. A small area of unknown use, consisting of a circle and a square enclosed by a decorative metal fence, is located on the southwest hill slope (#59) nearby and appears to date from the same period. Most of the other early buildings are located on the southeast ridge.

#33: West Building (1889-90; figures #2, 3)

Located on the south ridge of the campus, the Queen Anne/Romanesque Revival-style West Building was the first to be constructed by the school. Known originally as the Asylum, it was designed by Preston to house custodial cases. It is built on an E-plan with a two-story central pavilion (originally containing the dining room) projecting from the south elevation as its organizing focus. Boys' and girls' wards were located in the east and west wings, respectively. The red brick building rises one to two stories from a fieldstone foundation to a slate gable and hip roof. It is trimmed with sandstone sills, beltcourses, and coping, as well as brick buttresses, corbelling, and decorative panels. The main entry, recessed behind a wide Romanesque Revival-style arch, is located to the right of the dining pavilion. Windows contain a variety of multi-pane sash (6/6, 8/8, 9/9), are often paired, and are sometimes set in segmental arches. William G. Preston was the architect. In 1915, wooden floors were replaced with more sanitary and fireproof terrazzo over concrete, the plumbing was replaced, and a porch was added. It has been vacant for many years and is in poor condition, with the site heavily overgrown. Additional information is included in the Significance section.

#34: Belmont House (1890)

The adjacent Belmont House is a small and simple rectangular-plan ward that rises one story from a cast-stone foundation to a steep hip roof extended on carved brackets. The entry with modern metal and glass door is off center on the north elevation. Windows display sandstone sills and lintels. This building was renovated in the early 1980s with 1/1 window sash replacing original 12/12, asphalt replacing slate roof shingles, and modern

(Continued)

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 7 Page 5

doors. It remains as a rather bland cube whose chief remaining features, the roof braces, are hidden by a gutter. Belmont may be the original power plant shown in front of West Building in an early engraving (figure #2). It was named for a physician at the school, and was probably designed by Preston.

#1: Waverley Hall (1891)

One of the most prominent buildings on the southeast ridge is Waverley Hall, which faces west toward the center of the campus over a broad sloping lawn (#8). Waverley Hall served as the Administration Building until 1936, when it was converted to staff housing. It appears to have been enlarged several times, specifically by the two large rear ells projecting from its northeast corner. Designed by Preston in the Queen Anne style, it is constructed of red brick with corbelled cornice and sandstone trim including beltcourses, lintels, sills, and decorative carved panels. The main block rises three stories from a fieldstone foundation to a flat or low-pitched roof. Its facade (W) is organized with a six-bay central section defined by massive paneled chimneys. The center entry consists of a double-leaf door with small pane sash fronted by a hip roof portico. Windows contain 6/6 sash. Third-story windows are round arched with bricks laid in a diaper pattern above. A rounded bay is attached to the front southwest corner. The large ells are also constructed of red brick on fieldstone foundations and are ornamented with corbelled cornices; they may date to the early twentieth century.

#3: Activity Center (1891; figures #4, 5, 7)

Located immediately northeast of Waverley Hall and constructed in the same year, the Activity Center is similar in style and appearance. It also faces over a similar landscaped lawn area (#91). It is a three-story, red brick structure resting on a fieldstone foundation and trimmed with a corbelled cornice, and sandstone sills and beltcourses. The eleven-bay facade (S) is organized with a projecting five-bay central section defined by exterior chimneys. Here the three central bays are slightly bowed within a massive round-arched opening that rises above the hip-roofed entry porch. The flanking sections display blind arches outlined by burnt headers that link first- and second-story windows, while the upper story is set off by a secondary corbelled cornice. The same features are found on the four-bay side elevations. Windows generally contain 8/8 sash. This building was designed as a girl's dormitory by William G. Preston.

(Continued)

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 7 Page 6#4, 5: Schoolhouse (1891; figures #3, 8)

Located behind (E) Waverley Hall, the schoolhouse is a two-story, red brick structure of irregular plan, and shares many features with the buildings already described.— It was also designed by Preston, and faces onto the lawn cited above (#91). Common features include fieldstone foundation, some round-arched window openings, buttresses, and sandstone sills and beltcourses. The seven-bay facade (W) is centered on a sidelit and transom-topped entry, and a shed roof porch supported on massive carved braces. It is flanked by paired windows whose round-arched heads display herringbone pattern brickwork. Second-story windows are conventional with a three-part window above the entry. Sash ranges from 6/6 to 8/8. A large hip-roof wing extends from the north side, while a flat-roofed wing extends southward. The former displays buttresses dividing paired window bays, while the latter exhibits the same details as the main block.

#6: Chipman (1892; figure #4)

Chipman forms the south side of the quadrangle (#91) with the buildings just described, and was also designed by Preston. It served as the model for later dormitories, which are subtle variants on its established theme. Like its contemporaries, it is a red brick building with fieldstone foundation and sandstone trim. It rises two stories to an asphalt hip roof. The symmetrical eleven-bay north facade is focused on a projecting three-bay center pavilion that contains an entry with open portico at the first story and a triple arched window above. This is framed by one-bay and three-bay sections, each of which are slightly set back. Windows contain 8/8 sash. Decorative panels separate first- and second-story windows. The building, which originally served as a girls' dormitory, was named for Catherine Chipman, Resident Psychologist in the 1930s.

#49: Infirmary/Stephen Bowen (1893, 1901, 1907)

Designed by Preston, this unusual ward is located south of the group just described. It consists of three attached square-plan wings, constructed several years apart, that rise one story to steep, slate hip roofs with large chimneys. It is constructed of the typical 1890s materials, including red brick walls and fieldstone foundation trimmed with corbelled cornices. Windows generally contain 6/6 sash; some are headed by transoms and some are paired. This building was constructed as an infirmary for patients with contagious diseases and demonstrates the general awareness of public health issues at the turn of the century. Surprisingly, it closely resembles the early power plant and

(Continued)



United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 7 Page 7

maintenance building at Monson (see form). Bowen was a Trustee in the 1930s.

**Buildings from the 1900s to 1920s**

Buildings from this period are interspersed among the earlier buildings and display many of the same characteristics, including one- to three-story height, red brick construction, fieldstone foundations, slate gable or hip roofs, sandstone trim, and round-arched door or window openings. Other features commonly seen on these buildings are overhanging roofs with exposed rafter ends, and burnt headers used to create decorative panels, quoins, and beltcourses. Most were built before 1910, and many were designed by William G. Preston.

#36, 37: MacDougall and Dolan Halls (1898, 1906; figures #9, 10)

Erected eight years apart, these nearly identical dormitories show how little building plans and ornamentation changed during the school's first twenty years. Designed by Preston, both are two-story, red-brick buildings of rectangular plan rising from fieldstone foundations to slate hip roofs. They are trimmed with corbelled cornices, sandstone lintels and sills, and burnt headers arranged in a variety of patterns. Both also have entries located in slightly projecting central pavilions and protected by hip roof porches. The MacDougall entry is surmounted by a triple-arched window, while Dolan's entry is surmounted by a triple window with diamond-pane transoms. Dolan is also trimmed with burnt header quoins, presaging a transition to the Colonial Revival style. Mrs. Dolan was a longtime matron in the building named for her, while Sarah MacDougall was matron of the Farm House in the pre-World War I period.

#11: Warren (1906; figure #12)

Another of Preston's designs, Warren is a red-brick structure that rises two stories from a fieldstone foundation to a slate hip roof. It is trimmed with the typical corbelled cornice and sandstone window surrounds as well as burnt header quoins and bands. The symmetrical nine-bay facade is focused on a center pavilion with canted sides that contains an entry with open portico at the first story and a triple window with small pane transom above. Windows contain 8/8 sash. L. Maude Warren was a physician in the 1930s.

Four similar Nurses' Residences were constructed in the early twentieth century, a period when they appeared on most of the

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 7 Page 8

state hospital and school campuses. The East and West Homes are identical.

#9, 38: East and West Nurses' Home (1906; figure #11)

Located on opposite sides of the campus, these three-by-seven-bay rectangular-plan, red brick structures are typical of turn-of-the-century buildings at Fernald. They rise two stories from fieldstone foundations to slate hip roofs with central and facade chimneys. Their nearly symmetrical facades are centered on transomed entries recessed within large round-arched openings whose spandrels are picked out with burnt headers surmounted by triple-arched windows. Windows with 8/8 sash display sandstone sills and splayed brick lintels. A burnt header beltcourse forms the sill for the second-story windows. Preston was the architect.

#12: South Nurses' Home (1907; figure #12)

The South Nurses' Home is the most elaborate of four such residences erected within a few years of each other (North Home, #7, 1904; East Home, #9, 1906; West Home #38, 1906). It is a two-story, red-brick building rising from a fieldstone foundation to an asphalt hip roof. Entries, recessed within round arched Romanesque Revival-style openings, are located on both main elevations (north and west ) of this L-plan building. Windows contain new 1/1 sash. Like the buildings from the 1890s, and the other nurses' homes, it is further trimmed with sandstone sills and lintels, and burnt header beltcourses and watertable. Preston was the architect. A concrete handicapped access ramp has been added to the west facade.

#10: Manual Training Building (1904; figure #13)

This large red-brick structure with lateral rear wings rises two stories from a fieldstone foundation to an asphalt hip roof. Flemish bond panels with burnt headers separate first- and second- story windows. The sixteen-bay west facade is organized with a projecting eight-bay central pavilion, framed by four bay wings. The main entry is nearly centered on the facade, where it is recessed within a large round-arched opening and protected by a hip-roof hood. A second entry occupies the outer south bay. Large windows, some of which are paired, contain 6/6 sash. Preston was the architect. See the Significance section for a description of the activities housed in this building.

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 7 Page 9

#42: East Building (1906; figure #14)

East is a large T-plan ward that displays the typical turn-of-the-century Fernald materials and features, including red brick construction, fieldstone foundation, slate hip roof with large interior chimneys, sandstone window surrounds, burnt header beltcourses, and round-arched entries. The symmetrical, thirteen-bay south facade is focused on a five-bay, central-entry pavilion, which is fronted by an open porch and is surmounted by a large two-story, arched window. It is framed by paired windows, and four-bay end sections. Preston was the architect.

#23: Lavers Hall (1914)

Lavers is a large, red brick dormitory built on a U-plan with two enclosed pavilions projecting from the asymmetrical twenty-three bay-east facade, and paired wings extending from the rear. Typically, it rises one story from a fieldstone foundation to a slate hip roof with large interior chimneys, and is trimmed with sandstone. An entry with open porch is off center between the two pavilions. Large conventional windows contain 12/12 sash. Harriet Lavers was matron of this building when it served its original function of infirmary for male patients. It was designed by James Calderwood.

#21: Southard Research Lab (1921)

This small rectangular-plan lab with Craftsman-style features is very similar to buildings constructed during the previous decade. It is a red brick structure that rises one story from a fieldstone foundation to an asphalt hip roof with interior chimneys that is extended on brackets. The entry is centered on the nine-bay east facade, where it is enclosed in a large glazed porch. Windows are segmentally arched and contain 8/8 sash. The building represents the strong interest in scientific understanding of the etiology of mental disease that arose in the 1920s and 1930s; the school's first clinical research director was appointed in 1937. The building was designed by Kendall, Taylor & Co.

Buildings from the 1930s

Major new construction was initiated in the Depression years, as was the case at many other campuses. The buildings are designed in the popular Colonial Revival style, making a clean break with their Queen Anne-influenced predecessors. They generally maintain the established two- to three-story height and red brick construction, but generally replace the earlier fieldstone foundations and sandstone or burnt header trim with cast stone.

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 7 Page 10

Many were designed by Clarence P. Hoyt. Wallace Hall (#46, 1936) was cited as a WPA project.

#40: Food Service Building (1931)

This large, red-brick, Colonial Revival-style structure consists of a dining room/headhouse at the south end, with a long kitchen ell extending to the rear (N). Both rise one story from high basements set off by sandstone watertables to gable roofs. The dining section displays bridged end chimneys, corner quoins, and arched windows in the three-bay side elevations. The main entry is centered on the south facade, where it is contained within a projecting five-bay portico. Large windows contain multipane metal industrial-type sash. This section is extended by a two-story, gable-roofed ell with a flat-roofed ell wrapped around it and projecting on the west side of the headhouse section. Hoyt was the architect.

#47: Administration Building (1933)

The thirteen-by-three-bay Administration Building represents the full transition to the Colonial Revival style following a hiatus in major building during the 1910s and 1920s. It is a well-detailed, one-story, red-brick building rising from a high basement and watertable to a slate hip roof. Its thirteen-bay facade (S) is organized with a center entry emphasized by a full pedimented portico surmounted by a cupola. The entry itself is distinguished by fluted pilasters, a pulvinated frieze, and broken pediment. Fenestration consists of round-arched windows with 12/12 sash, rising from blank balustrades and surmounted by cast-stone panels. Cast stone is also employed for keystones, corner quoins, and watertable. An eleven-bay wing with conventional 9/9 and 12/12 sash is centered on the rear elevation. The building received a flat-roofed, two-story rear ell ca. 1965. Hoyt designed the original building. It was published in a survey of public buildings constructed with PWA assistance in 1933-1939 (Short & Brown 1939: 351). Constructed at a cost of \$112,850, it was described as containing "an office and work space for the chief clerk, two social-service rooms, two school testing rooms, three psychology rooms, photography room, offices for the chief of clinics and head of school clinic, examination rooms and a pharmacy, offices for the school administration, and a board room." The project was completed in October 1936.

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 7 Page 11

#35: Seguin (1934)

Seguin is built on the double Y-plan that was pioneered at Metropolitan State Hospital and became popular for infirmaries on several campuses in the 1930s, especially Monson (see form). It is a red-brick, Colonial Revival-style structure that rises one story from a cast-stone foundation to a slate hip roof surmounted by a cupola. An entry with portico is centered on the north facade. Window bays are defined by piers and corbelling; 6/6 sash has been replaced by 1/1. Designed by Hoyt, this building was named for the noted pioneer of treatment for the mentally retarded, Dr. Edouard Seguin.

#39: Wheatley (1933)

This is another red-brick, Colonial Revival-style ward built on a popular 1930s plan, this time the modified E-plan used extensively at the Wrentham State School (see form). This building type was used for nurseries, housing young children, at all three state schools. This one rises one story from a cast-stone foundation to a slate gable roof with central cupola. The main entry is centered on the east facade, where it is fronted by a gabled wood portico and embraced by cross pavilions with corner quoins and Palladian windows. Windows contain 8/8 or 10/10 sash. Frank G. Wheatley of Abington was a Trustee at the turn of the century, serving as board president in 1911.

**Single-family staff dwellings**

#43: Hillside/former Superintendent's House (1904)

As its name implies, Hillside is sited on a rise overlooking the south campus. It is a large, shingled Queen Anne/Colonial Revival-style structure that rises three stories from a fieldstone foundation to a gambrel roof with modillion cornice and large center chimney. The main entry with fanlight and open Tuscan porch is centered on the south gable end. It is now approached by a concrete handicapped ramp. Windows contain 15/1 sash except in the gables, where the upper sash is diamond pane. Preston was the architect.

#17, 18, 19, 20: Cottages 17, 18, 19, 20 (1925)

These nearly identical cottages are two-story Craftsman-style structures enclosed by gable roofs with exposed rafter ends and off-center chimneys. Enclosed entry porches with arched openings are centered on their three-bay southwest facades. One-story sunporches extend from their left sides. Windows contain 6/6 sash. Cottage #20 is sheathed with wood shingle, while the

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 7 Page 12

others are stuccoed. They were built as staff residences, with Curtis W. Bixby as the designer.

Modern Buildings

The Fernald campus experienced major expansion in the second half of the twentieth century, especially in the 1970s.

#50: Greene (1953)

The Greene Unit is one of the largest buildings on campus. Located on the western ridge, it is built on an irregular plan consisting of an E-shaped section with a large east wing extending northward. It is faced with red brick and rises three stories to a flat roof. Large windows are grouped in vertical or horizontal strips. The main entry faces south from the east wing. Dr. Ransom A. Greene was appointed superintendent in 1925, following Dr. Fernald's death.

#75, 76, 77: Brookside, Woodside, Site 5 (1981)

These three nearly identical buildings are blocky, one-story structures faced with red brick and enclosed by flat roofs with vertical panel parapets. Large, single-pane windows are arranged in banks. Woodside consists of two parts connected by an open International Style-type walkway.

#64-74: Cottage Complex (1976)

The cottage complex consists of eleven identical U-plan duplexes grouped at the northwest corner of the campus near Trapelo Road. Swings, benches, and an open pavilion (#121) dot the lawn area between buildings. These one-story structures are dominated by wood shake-covered mansard roofs that descend to window-sill level, barely exposing red brick-faced walls. Windows contain 1/1 sash. Metal doors are located in the courtyards formed by the U-plans. These small-scale patient wards initiated a new era of more intimate and homelike living accommodations, which in the 1990s is still being employed by the Department of Mental Retardation for new construction at both state schools and hospitals.

Archaeological Description

While no prehistoric sites are currently recorded within the boundary of the school, it is possible that sites are present. One site is reported in the general area (within one mile). That site, the Clematis Brook site (19-MD-365), abuts the southwest

(Continued)

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 7 Page 13

corner of the school. It is unknown, at present, whether or not the site extends onto the school property. Locational characteristics of the school, including well-drained, level to moderately sloping terraces adjacent to Clematis Brook, Beaver Brook, an unnamed brook, unnamed pond and other wetlands, indicate locational criteria favorable for Native American subsistence and settlement activities. An archaeological reconnaissance survey (Jones 1989) has recently identified the locations for two prehistoric sites north and west of Beaver Brook in the Beaver Brook Reservation, less than one-half mile east of the Fernald State School. These factors combined with the availability of open land adjacent to wetlands indicate a high potential for locating prehistoric resources. Prehistoric sensitivity is the highest along the unnamed brook running north/south through the central portion of the school, along the western periphery of the school bordering Clematis Brook and an unnamed pond and along the southern portion of the school bordering Beaver Brook. Railroad and school construction may have adversely affected the integrity of prehistoric resources in the latter area along Beaver Brook. The extent of this effect is unknown at this time.

There is a high potential for locating significant historic archaeological remains on the school property. Structural remains include at least one barn foundation, #28 (date unknown) and the remains of a stone farmhouse whose precise location is unknown at this time. In 1888 an existing stone farmhouse was reportedly fitted out for use as a boys dormitory. That building cannot be identified today. The structure may have been built for the school during the 19th century or may predate the school. Structural remains may also survive for outbuildings that predate the school and those associated with agricultural activities at the school. Few agricultural-related at the school resources have survived or are expected at the Fernald School when compared to other campuses, since agriculture played a minor role at the school. Templeton Colony was developed in 1899 to fulfill the agricultural function for the Fernald School. Construction features may also be important at the school. Some of the earlier buildings having fieldstone foundations may have been dug by patients. Occupational-related features, such as trash areas, likely survive in the school area associated with potential farms that predate the school, and with school operations. A cemetery has not been located on the Fernald School grounds; however, one may be present since numerous deaths occurred, particularly during the late 19th/early 20th century period. Later deaths at

(Continued)

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 7, 8 Page 14, 1

the school used the Metropolitan State Hospital Cemetery; however, burial practices for the period indicated above cannot presently be identified. An unmarked cemetery may exist, possibly near the West Building where a small area exists enclosed by a decorative wrought iron fence. Earlier deaths, prior to the establishment of a cemetery at the Metropolitan State Hospital, may have been interred at one of the numerous municipal and private cemeteries in the general area per agreement with the town.

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## HISTORICAL SIGNIFICANCE

The Walter E. Fernald State School possesses integrity of location, design, setting, materials, workmanship, feeling, and association. It was founded by Boston reformer Samuel Gridley Howe (1801-1876) in 1848 with an initial appropriation of \$2,500 from the State Legislature, making it the first publicly supported institution for the mentally retarded in the Western Hemisphere. From humble beginnings in South Boston, the school grew in size and stature under the strong leadership of Howe and his successor, Dr. Edward Jarvis. In 1887, their achievements were recognized by the Legislature with purchase of a large new campus in Waltham, which was the second in the state to be developed on the cottage system, following the Lyman Reform School in 1884 (see form). Here, Dr. Walter E. Fernald (1859-1924), the third superintendent, led the school into the twentieth century, instituting new programs in education, psychology, social work, and scientific research. In 1925, the name of the school was changed from the Massachusetts School for the Feeble-Minded to the Walter E. Fernald State School in his honor. The Fernald School is unique in owing its development and stature chiefly to the dedication of its three renowned superintendents: Samuel Gridley Howe, Edward Jarvis, and Walter E. Fernald, who together, led the school from 1848-1924. The Fernald School clearly represents the development of the State Hospital and School System as described in the overview, and meets criteria A, B, and C of the National Register of Historic Places. It is significant on the local, state, and national levels with a period of significance extending from 1888 to 1940.

The Fernald School was founded by Samuel Gridley Howe, a Boston native educated at the Boston Latin School and Brown University.

(Continued)



United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 8 Page 2

Well known as a social reformer, Howe was involved in the Greek Revolution, and in developing educational programs for the blind, before settling on his major life's work: advocacy of training programs and humane living conditions for the "feeble-minded." Howe was one of three commissioners appointed by the governor "to investigate the condition of idiots" in Massachusetts in 1846. Two years later, he was instrumental in securing the cooperation of the Massachusetts School for the Blind when the Legislature appropriated \$2,500 annually for three years to teach ten "idiotic" children at some existing charitable institution as an experimental program. By 1850, the experiment had proved so successful that the Massachusetts School for Idiotic and Feeble-Minded Youth was formally established by the Legislature with Howe as one of its incorporators. The following year, the State agreed to provide support at the rate of \$5,000 annually, a Board of Trustees was established, and Howe was appointed to the unpaid positions of Superintendent and President of the Board (Wallace 1941: 7-11).

In 1852, a mere four years after inauguration of the experimental program, the school moved to its own rented quarters in South Boston, and Dr. Edouard Seguin was persuaded to spend two months there developing programs and training teachers, although he turned down the offer to stay on as Superintendent. Seguin, a Frenchman, was the first to successfully instruct "idiots" through a systematic training of the senses. He gained international recognition through publication of his "Treatise of Idiots" in 1846, and he may be credited with sparking spontaneous interest in the condition and training of the "feeble-minded" throughout Europe and the United States (Wallace 1941: 12-13).

At the opening of the experimental school in Massachusetts, Dr. Howe described its goals thus:

It is proposed to show our reverence for God's plain will and to acknowledge the common brotherhood of man by taking these, the most unfortunate of His children, and attempting to lift them to a place upon the common platform of humanity. It is hoped to train them to cleanliness and decency, to prevent or root out debasing habits, moderate gluttonous appetites, and lessen the strength of the animal desires by substituting constant occupation for idleness. To train all the senses, to strengthen the power of attention, develop the muscular system, and some degree of dexterity in simple handicraft. To call out their social affections, to inculcate feelings of regard for others in

(Continued)

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 8 Page 3

return for love and kindness shown them; to appeal to the moral sense and to develop religious sentiment. It is to be hoped that part of them will gain useful knowledge, most of them become cleanly, decent, and industrious, and that all of them be better and happier for the efforts in their behalf (Wallace 1941: 10).

These goals were accomplished through Seguin's sense training methods and through adherence to a strictly regimented schedule, a program similar in many respects to those established by superintendents of "insane asylums" who believed in "moral treatment." At Howe's school, pupils rose at 5 A.M., breakfasted and prayed, then attended class from 8 A.M. until noon with one half-hour recess break. After dinner there was a recreation break until 2 P.M., then more classes until 5 P.M. The evening meal was followed by gymnastic exercise and bed (Wallace 1941: 13-14).

By 1856, exactly ten years after a commission was first appointed to study the condition of "idiots" in Massachusetts, the Legislature was persuaded to appropriate \$25,000 for the purchase of land and erection of a permanent home. The trustees, electing to stay in South Boston because of its uncrowded condition and proximity to the salubrious effects of the sea, purchased a 1 1/2-acre site at the foot of L and M Streets and constructed a wood-frame school (Wallace 1941: 14). During the next twenty years, the school grew in size and reputation under Howe's able leadership. According to the 1869 Annual Report, the population had grown to a daily average of 87, with a total of 108 treated during the school year. In 1871, cumulative statistics revealed that 465 pupils had been admitted since 1848, and 365 discharged. Additionally, numerous pupils had been refused admittance due to lack of space. By 1874, it was reported that the school was overburdened by its growing number of custodial cases and by applications for pupils from other states that either lacked schools entirely or had not achieved the exceptionally high caliber of the Massachusetts program.

At this period, Howe and the trustees described their school thus:

We wish the people would come and see what can be done with the seemingly hopeless cases. Here noisy, indecent, greedy, passionate children become quiet, cleanly, well behaved, more intelligent, and affectionate beings. Their indoor gymnastics, their exercise in the open air, their sea

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 4

bathing, boating, racing, football on the playground--all serve to exhilarate the spirit, and to improve their health and carriage. The enforced cleanliness, the required habits of good deportment, which is seen in their improved manners. The effect is not limited to strengthening the bodily and mental powers; even the religious sense is developed and cultivated. (Annual Report of 1871)

On January 9, 1876, Howe died at age 75 and was succeeded by his former assistant, Dr. Edward Jarvis, who identified four immediate needs for the school's continued growth and success. These were:

1. opportunities for trained, discharged pupils to find outside working and living situations.
2. an "Asylum" for trained pupils who lacked outside situations
3. a separate institution or department for custodial cases
4. a new, large site for the school (Wallace 1941: 25)

In 1881, these needs were partially met by purchase of a 100-acre farm in Dover where older boys could be sent to live and work permanently (Wallace 1941: 29). In 1883, another goal was met with the establishment of a custodial department for untrainable adult patients and a change in the school's name to the Massachusetts School for the Feeble-Minded (deleting the word "Youth"). Both of these events reflect an important change in the school's mission, broadening its scope from the training of high functioning children, to include the care of chronic adults.

This change in attitude, which is similar to that occurring at the state hospitals, appeared in annual reports of the 1870s, and was articulated in 1883 when the Trustees stated:

As already stated in our report of 1881, and in the report of the State Board of Health and Lunacy in 1882, the question of enlarging the operations of the School so they shall embrace not only the improvables but the unimprovables has resulted in the passage of an Act by the Legislature, which changes the name of the Institution.....and establishes a department of the School for an asylum for idiots beyond school age (Wallace 1941: 30).

Jarvis' major goal was not met until 1887, three years after his death, however, when the Legislature appropriated \$25,000 to purchase a new site and to hire a full-time resident superintendent. The trustees chose Dr. Walter E. Fernald to lead the school into a new era, and located an appropriate site in

(Continued)

United States Department of the Interior  
National Park Service

## National Register of Historic Places Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 5

Waltham near the Waverley Station of the Fitchburg and Massachusetts Central Railroad. Two estates, including the eighteen-acre Bird Estate, were purchased for \$18,000 in 1887, with \$7,000 left in reserve for future land purchases. The Legislature appropriated \$200,000 in 1888 to erect buildings for the school, a sum the trustees planned to supplement with sale of their South Boston and Dover properties. Fernald and the trustees decided to develop the school on the cottage system, citing the Willard Asylum in New York as a model (Wallace 1941: 35-36). They must also have been influenced by concurrent development of McLean Hospital just one mile distant, which had been planned on the cottage system with the assistance of noted landscape architect Frederick Law Olmsted. The only other example within the system at this time was the Lyman Reform School of 1884 in Westborough (see form).

During 1888, an existing stone farmhouse was fitted out to accommodate twenty to thirty boys from Dover along with a farmer's family; this group would help to prepare the site for general occupancy by digging drains and making roads. This model of an advance team of trained pupils from an existing school was later followed at Templeton (1899; see form), Wrentham (1906; see form), and Belchertown (1922; see form). In the meantime, ground was broken for the school's first building to be called the Asylum (now West Building; #33), which would house from 60-100 custodial patients. Plans were also made for a dormitory (#6), a gymnasium (#3), a schoolhouse (#4,5), a workshop, a boilerhouse (possibly #34, now Belmont House), a laundry, a kitchen, and an administration building (#1). The architect for these buildings was William Gibbons Preston of Boston (figures #2-5). It was reported that these and future buildings would not be arrayed in "checkerboard" fashion, but would follow the natural contours of the land and be placed so as to allow a southerly exposure for patient rooms. No landscape architect was cited, however (Wallace 1941: 36-39).

On March 6, 1890, the first sixty one boys and girls were transferred from the custodial wards at South Boston to the new Asylum Building at Waverley. A few months later the new accommodations, and their beneficial effect on the patients, were described thus:

The Asylum now in use six months is very satisfactory. The building has proved to be all that was promised. The steam heating and ventilation seem almost perfect. The incandescent electric lights, furnished by our own electric

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 6

plant, provide a form of lighting at once healthful, safe, and economical. The boys and girls were placed in two large sunny wards on the East and West wings respectively. They eat, sleep, and live on the ground floor with every access to shady groves and grassy lawns, which provide the privacy not possible in the city, or in their own homes.

When admitted, these children were noisy, stubborn, untidy, and intractable. One of them had not been outdoors for three years. Three had been in a barred room at home. Many were helpless, could not feed or dress themselves. They shrieked, tore, and destroyed their clothing, and the wards were bedlam. It was an apparently hopeless problem, but now a great and gratifying change has occurred. The careful day and night supervision has reduced the number of untidy beds at night and untidy clothing in the daytime. They are taking part in games, marches, and other exercises to fix their attention, and take great delight in these exercises.

Fifty-one of the older females are in the Asylum building and occupy two pleasant wards on the second floor. They are of great assistance and take great pride in the care of the younger helpless children.

On December 28, 1891, the last pupil was removed from South Boston and the long awaited move was completed (Wallace 1941: 40-42).

At Waltham, the patients' routines continued to embrace a mix of classroom education, manual and industrial training, and recreational activities such as formal gymnastics, musical events, dances, rhythmical drill, and competitive athletic contests. A domestic training program to teach girls cooking, washing, ironing, and general housekeeping was instituted in 1905 as a counterpart to the boys' training program (Wallace 1941: 65). A Manual Training Building (#10) was added to the campus in 1903 and expanded in 1908, reflecting the importance of these activities. Its functions were described thus in annual reports of the period:

The boys' classes occupy the first floor; one room for Sloyd, another mattress and pillow making; one to the actual making of useful articles at separate benches; one room contains tables where brush-making, sandpapering, net making, mat making and cane seating are done. Painting is also taught in this room -- one room is used for shoe

(Continued)

United States Department of the Interior  
National Park Service

**National Register of Historic Places**  
**Continuation Sheet**

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 7

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repairing for the whole institution including Templeton. The Weaving Room has several looms where the boys weave first-class crash for towels, and serviceable rag rugs. There are stock boxes for material for each industry; also bulletin boards with lists of classes for the entire day.

The girls' department upstairs is organized with the same care. One domestic training room, class room for sewing; another large room contains the knitting machines, looms, tables for cutting and sewing rags, one for pillow and lace making, basket making, knitting, crocheting, with material for each class (Wallace 1941: 71).

Almost immediately, annual reports began to include mention of public health issues, reflecting the growing scientific knowledge about infectious disease and public concern with controlling its spread. Outbreaks of typhoid and scarlet fever in 1891 led the trustees to request funds for a small contagious diseases hospital, a structure (#49) that was completed in 1893 and expanded in 1901 and 1907 (Wallace 1941: 41). A diphtheria epidemic in 1896 resulted in the use of antitoxins for the first time (Wallace 1941: 55). Influenza became a major problem during World War I, with the first of 833 cases reported on September 17, 1918; 85 patients died (Wallace 1941: 95). By the 1930s, the incidence of contagious disease was greatly lessened by the availability of various tests such as the Schick and Dick tests, which detected diphtheria and scarlet fever, allowing new patients to be inoculated when necessary (Wallace 1941: 141).

The school entered the twentieth century expanding its innovative programs rapidly and retaining its national and international stature. A school department with graded classes was opened in 1892 (Wallace 1941: 42).

Teaching clinics for Tufts and Boston University Medical School students were instituted in 1903, expanding the program initiated in 1884 with Harvard (Wallace 1941: 32, 61). A formal parole or vacation system was adopted in 1912 along with the new position of field or social worker to supervise pupils with outside placements. At the same time, an outpatient clinic was established, further strengthening community ties. By 1915, monthly clinics had been started in Worcester, Fall River, New Bedford, and Haverhill, and that year the school held a total of 32 clinics involving 743 patients (Wallace 1941: 92). Patients' health needs were treated more scientifically in a small hospital

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 8

(#49; 1893, 1901, 1907) as methods and products developed by the State Board of Health, such as diphtheria antitoxin, were employed in 1915, and tuberculosis tests were introduced in 1920 (Wallace 1941: 90, 100). More complete profiles of the patients' mental condition were also made available through the use of new psychological tests such as the Binet-Simon and the Intelligence Quotient (Wallace 1941: 82; 104). X-ray examination of the brain was introduced as a diagnostic tool in 1920 (Wallace 1941: 100). Dental Clinics, held by Tufts University, were established in 1917 (Wallace 1941: 94). The first women physicians--Drs. Anna M. Wallace and Edith Woodill--were appointed in 1907 (Wallace 1941: 68). A training course for attendant nurses was established in 1929 (Wallace 1941: 145), and a research department was established in 1937.

As early as 1905, the British Royal Commission on the Care and Control of the Feeble-Minded provided the following glowing report on the Fernald School to the American Institutions for the Feeble-Minded.

This is a most interesting institution, embodying in itself the whole history of American methods of dealing with the feeble-minded from its earliest beginnings in the training school for the idiot to its latest development, --the colony (Templeton) for the permanent custodial care and employment of defectives unfit for free life. Its superintendent is Dr. W. E. Fernald, who is not only one of the greatest authorities in the United States of America on the medical aspect of the care of mental defectives, but is an institutional manager of great energy, enthusiasm, resource, and capacity (annual report, 1905). As is apparent from the foregoing quote, the British Commission was particularly interested in the school's custodial farm colony in Templeton (see form), a department continually described in Annual Reports as its most successful.

The early twentieth century was a period of major growth as applications for admission rose from 142 in 1889 to 484 in 1911 (Wallace 1941: 76). This reflected the expanded mission of the school to accept chronic, pauper, delinquent, epileptic, and physically disabled cases that were not considered suitable for training, but nevertheless were in need of proper humane care. To meet the increased demand, it was decided to increase the total patient population from 600 to 1,000 in 1896 (Wallace 1941: 50). The school's change in philosophy was intertwined with a growing societal fear of increased deviancy, as science

(Continued)

United States Department of the Interior  
National Park ServiceNational Register of Historic Places  
Continuation SheetWalter E. Fernald State School  
Waltham (Middlesex County)  
MassachusettsSection number 8 Page 9

illuminated the role of heredity and began to link feeble-mindedness with crime, pauperism, and immorality. Annual reports of the period continuously cited the problems caused when mentally deficient patients were transferred from the state reform schools. They also stressed the need to provide institutional protection for adult females to prevent their bearing defective children, and to segregate adult male and female patients within the institution. Dr. Fernald was a national leader in exploring the problems of morally and mentally deficient children and in promoting eugenics.

The results of the growing patient population are seen in several ways. One is in the establishment of other facilities, including the Templeton Farm Colony for chronic adult males (1899), the Wrentham School (1907), the Belchertown School (1915-22), and institutions in all of the other New England states during that period. The other is in the major building campaign that transformed the Waverley campus between 1895 and 1925. New buildings included several patient dormitories to support a total population of just over 1,000; staff housing including a superintendent's residence as well as dormitories for nurses and attendants; medical, educational, and recreational facilities; and support buildings including a power plant, laundry, kitchen, and dining room. The Depression slowed construction which resumed in the mid-1930s. At least one building, Wallace Hall (#46; 1936), was constructed by the Public Works Administration (Wallace 1941: 147).

In 1924 Dr. Fernald (1859-1924) died after thirty seven years of service to the school. The following year, Chapter 293 renamed the institution as the Walter E. Fernald State School in his honor. As the British Commission had noted in 1905, Fernald was a renowned authority on mental retardation with many publications to his credit. These included the "History of the Treatment of the Feeble-Minded" (1895), "Some of the Methods Employed in the Care and Training of Feeble-Minded Children" (1894), "Feeble-Minded Children" (1887), "Care of the Feeble-Minded" (1904), and "Imbeciles with Criminal Instincts" (1909). The Massachusetts Medical Society said that he "did more for the training of the feeble-minded and for bringing about an understanding of their problem than, perhaps, any other American psychiatrist (MMS 1930: 14). A eulogy published in the 1924 Annual Report described Dr. Fernald's distinctions and achievements in greater detail.

(Continued)



United States Department of the Interior  
National Park Service

**National Register of Historic Places**  
**Continuation Sheet**

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 10

His achievements as an educator have been far-reaching. He recognized the first step in education of the feeble-minded was to make them happy; that the feeble-minded, like other persons, are happy only when they are doing something for which their capacity fits them. He arranged a 24-hour program in which the child is doing all the time, whatever its capacities demanded. This school became in a real sense a university. During the past year individuals and delegates were sent from 28 states and 13 countries and 4 provinces in Canada. He gave lectures to medical students, to teachers of special classes, public health nurses, physicians taking post-graduate work in pediatrics, psychiatry, etc.

As an organizer he standardized everything he undertook, whether in erecting a building, clearing a field of stones, etc. His scientific standing was widely recognized. In 1912 he received the honorary degree of Master of Arts at Harvard. He was widely sought as a lecturer on mental disease and criminology. Twice President of the Association for the Study of the Feeble-Minded, in 1915 and 1924, he was at the time of his death, President of the Massachusetts Society of Psychiatry and the Boston School of Occupational Therapy. He was a leader in the National Society of Mental Hygiene. He was the originator of the ten-point system for testing and classifying of the feeble-minded. He proved the psychological tests alone were not enough. He secured practically every piece of legislation that had anything to do with these subjects for the last 30 years.

The Fernald School continued to enjoy a strong national and international reputation, as continued visits to the campus demonstrated. In the 1920s, the school entertained representatives from Russia, Austria, China, Poland, Ceylon, South Africa, England, Czechoslovakia, Central India, Norway, Denmark, France, and New Zealand (Wallace 1941: 113).

Fernald was succeeded by Dr. Ransom A. Greene on April 9, 1925. Greene had previously been Superintendent at Taunton State Hospital (Wallace 1941: 116). Soon after his appointments in 1926, a ten-year construction program to expand capacity to 2,000 beds was approved by the Trustees. At that time, the population stood at 1,330, with more than 1,000 applications for admission. Nursery dormitories and an administration building were cited as the most pressing needs (Wallace 1941: 122-23). The nine-acre

(Continued)

United States Department of the Interior  
National Park Service

## National Register of Historic Places Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 11

Baldwin estate adjoining the campus was acquired at this time to provide room for gardening and to provide privacy (Wallace 1941: 118). With a waiting list of 1,829 in 1933, discussions about the possibility of constructing a fourth school were initiated (Wallace 1941: 141).

In 1937, Dr. Paul I. Yakovlev was appointed Director of Clinical Research at the Fernald School (Wallace 1941: 155). His work was described thus:

...clinic and bio-chemical routines as well as pathological, histological and microscopic studies, X-ray, etc, are being carried on; research is directed to both laboratory and clinical symptomatology and an attempt to get at etiology--the hereditary and environmental factors and diagnoses and thus provide a scientific basis for therapy....

The 1945 Governor and Council Report described the laboratory as outstanding. Yakovlev, who was medical as well as research director at the School, was also an instructor at Harvard, Boston University, and Tufts Medical Schools.

In the 1938 annual report of the Fernald School, Superintendent Dr. Ransom Greene articulated the philosophy of the institution. Although he professed to be a believer in tradition, his words demonstrated the vastness of change since the mid-nineteenth century:

I wish to pay tribute to all the predecessors of the position which I now hold, in that they have always been more concerned about principles than standards and their primary interest has been the possibility of ameliorating the burden to society of those for whom they and we have to care, and in addition determine, if possible, how future generations may be protected or relieved from such a burden...The problem as a whole is far from simple; it involves primarily medical knowledge and not secondary, but in addition, problems of education, sociology, psychology and legal affairs...The principles involved have been not only that of ameliorating the burden and immediate stress of the individual but the problem as a whole from the standpoint of welfare of our communities and relieving them of this burden for future generations...This has been the aim from the time of Dr. Howe, Dr. Sequin, Dr. Jarvis and Dr. Fernald. We are making progress along these lines...

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 12

We have reached the stage in the last year where we have been able to start on a definite research program...the ends for which we aspire are based on purely the principles exemplified by the founder of such an institution as this, Dr. Samuel Gridley Howe". (Wallace 1941: 156-57).

The contrast between Howe and Greene is great, and reflects the change from a moral/religious ethic underlying care and treatment to a belief in scientific progress.

The 1945 Governor and Council Report described the 240-acre Fernald School as one of the finest institutions in the state, saying:

It is too bad that the Executive Department of the State Government did not make proper allowances for an increase in facilities in this institution during the past decade, so that hundreds of children now being cared for inadequately in their own homes could have been properly taken care of in this institution....No better treatment could be obtained at any price.

The school's patient population of 1,890 was over the capacity of 1,540, even with 75 on parole. There were 236 staff members with 181 vacancies. The varied program of industrial therapy included a beauty shop, men's barber shop, printing, carpentry, shoe-repairing, brush, broom and mat making, weaving, dressmaking, painting, domestic science, stocking manufacturing, rugmaking, knitting, crocheting, embroidering, lace making, basket weaving, clothing manufacturing, and canning. Agricultural facilities included a cow barn with 50 head of steer, and a horse barn, but most such activities were carried out at the Templeton Colony. Building needs cited by the report included a hospital, installation of vacuum heating, two officers' cottages, additions to the Manual Training Building, a root cellar, a cow barn, a horse barn, a dormitory for young boys, two dormitories for young girls, and an infirmary for girls.

The Depression temporarily halted growth of the school as is indicated by the 1945 report, but development resumed after World War II. The patient population rose to 2,600 in the 1960s, while the staff remained at 800. In 1972, Fernald came under court order to improve services. This resulted in reduction of the patient population to 1,161 in 1979, and to 855 (including Templeton) in 1987; additions to the staff, which reached 1,900

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8 Page 13

in 1979, and 2,400 in 1987; major new construction; and upgrading of existing buildings. As of 1989, Fernald operated five community residences in addition to the 848 clients living at Waltham and Templeton, and employed 2,500 staff (Internal History Fact Sheet).

Archaeological Significance

Since patterns of prehistoric occupation in Waltham are poorly understood, any surviving sites could be significant. Prehistoric sites in this area can contribute to a greater understanding of Native American settlement and subsistence along tributary streams in the lower Charles River drainage. Much of this area is undocumented because of under-reporting in the area, probably due to urban development in the 20th century. Prehistoric sites in this area may be part of a seasonal adaptation based on the availability of environmental resources with larger sites along the main branch of the Charles River, possibly in the estuarine zone. Prehistoric sites in this area may also be part of subsistence and settlement systems that incorporate sites along the internal Charles River drainage.

Historic archaeological remains described above have the potential to document land use history in the area that predates development of the Fernald School in 1887. Background research accompanied by archaeological survey and testing can help locate and reconstruct the components of farmsteads or other agricultural operations in the area indicated by the presence of foundations, stone walls, and documentary resources. Further documentary research and analysis of construction features including builder's trenches can provide information on patient participation during construction and the similarity or differences in construction methods where patients are used as compared with those by standard civilian workers. Detailed analysis of occupational-related features can provide information on individuals who occupied farms that predated the school, as well as different patients at the school. Specialized trash areas may exist for the small contagious disease hospital (#49) completed in 1893, which could provide details pertaining to patient treatment under isolated conditions.

Specialized refuse deposits may also exist for the school's varied programs of industrial therapy, which included a beauty shop, men's barber shop, printing, carpentry, shoe-repairing, brush, broom and mat making, weaving, dressmaking, painting,

(Continued)

United States Department of the Interior  
National Park Service

## National Register of Historic Places Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 8.9 Page 14.1

domestic science, stocking manufacturing, rugmaking, knitting, crocheting embroidering, lacemaking, basket weaving, clothing manufacture, canning and limited agricultural activities. Analysis of archaeological survivals from the activities may indicate the extent and importance of these activities at the school. Some of these activities may have had economic importance.

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### List of Figures

1. Site Plan, Waltham, 1887.
2. Asylum (West) Building. 1889.
3. Plans, Asylum and School Buildings. 1889, 1890.
4. Girls' Dormitories. 1890, 1894.
5. Plans. Girls' Dormitories. 1890.

(Continued)

United States Department of the Interior  
National Park Service

National Register of Historic Places  
Continuation Sheet

Walter E. Fernald State School  
Waltham (Middlesex County)  
Massachusetts

Section number 9, 10 Page 2, 1

- 
6. Photo. Old Stone Farmhouse. ca. 1910.
  7. Photo. Activity Center. ca. 1910.
  8. Photo. Schoolhouse. ca. 1910.
  9. Photo. MacDougall & Dolan Halls. ca. 1910.
  10. Photo. Dolan Hall. ca. 1910.
  11. Photo. West Nurses' Home. ca. 1910.
  12. Photo. Warren Hall, South Nurses' Home. ca. 1910.
  13. Photo. Manual Training Building. ca. 1910.
  14. Photo. East Hall. ca. 1910.

**GEOGRAPHICAL DATA**

Verbal Boundary Description

See attached maps

Verbal Boundary Justification

The nomination is confined to present campus boundaries which were achieved during the period of significance.

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WALTER E. FERNALD STATE SCHOOL  
 WALTHAM, MASSACHUSETTS  
 DISTRICT DATA SHEET

MAP#	BUILDING NAME	DATE	STYLE	ARCHITECT/DESIGNER	STATUS	RESOURCE
1	Waverley Hall	1891	Queen Anne	W. G. Preston	C	B
2	North Building	1897	Queen Anne	W. G. Preston	C	B
3	Activity Center	1891	Queen Anne	W. G. Preston	C	B
4/5	Schoolhouse/Gym	1891	Queen Anne	W. G. Preston	C	B
6	Chipman	1892	Queen Anne	W. G. Preston	C	B
7	North Nurses' Home	1904	Queen Anne	W. G. Preston	C	B
8	Waverley Hall Lawn	ca. 1891	n/a		C	B
9	East Nurses' Home	1906	Queen Anne	W. G. Preston	C	Sl
10	Manual Training	1904	Queen Anne	W. G. Preston	C	B
11	Warren Hall	1906	Queen Anne	W. G. Preston	C	B
12	South Nurses' Home	1907	Queen Anne	W. G. Preston	C	B
13	Thom Building	1952	Colonial Revival	W. G. Preston	C	B
14	Power Plant	1921	Utilitarian		C	B
15	Main Garage	1932	Utilitarian		C	St
16	Storehouse	1891	Queen Anne	W. G. Preston ?	C	B
17	Cottage #17	1925	Craftsman	Curtis Bixby ?	C	B
18	Cottage #18	1925	Craftsman	Curtis Bixby?	C	B
19	Cottage #19	1925	Craftsman	Curtis Bixby?	C	B
20	Cottage #20	1925	Craftsman	Curtis Bixby?	C	B
21	Southard Research Lab.	1921	Craftsman	Kendall, Taylor & Co. ?	C	B
22	Laundry	1928	Utilitarian		C	B
23	Lavers Hall	1914	Craftsman	James Calderwood	C	B
24	Maintenance	1930	Utilitarian		C	B
25	Greenhouse	ca. 1940	n/a		C	B
26	Electric Sub station	ca. 1960	Utilitarian		NC	B
27	Engineers' Storage	ca. 1930	Utilitarian		NC	B
28	Barn foundation	ca. 1900	n/a		C	B
29	Shed (stucco)	ca. 1920	Craftsman (poor)		C	St
30	Shed (metal)	ca. 1970	Utilitarian		C	B
31	Garage (concrete block)	ca. 1950	Utilitarian		NC	B
32	Tarbell Hall	1934	Tudor Revival		NC	B
33	West Building	1890	Queen Anne	W. G. Preston	C	B
34	Belmont House	1890	Queen Anne	W. G. Preston	C	B
35	Seguin Hall	1934	Colonial Revival	Clarence P. Hoyt	C	B

WALTER E. FERNALD STATE SCHOOL  
WALTHAM, MASSACHUSETTS  
DISTRICT DATA SHEET

MAP#	BUILDING NAME	DATE	STYLE	ARCHITECT/DESIGNER	STATUS	RESOURCE
36	MacDougall Hall	1898	Queen Anne	W. G. Preston	C	B
37	Dolan Hall	1906	Queen Anne	W. G. Preston	C	B
38	West Nurses' Home	1906	Queen Anne	W. G. Preston	C	B
39	Wheatly Hall	1933	Colonial Revival		C	B
40	Food Service Bldg.	1931	Colonial Revival	Clarence P. Hoyt	C	B
41	Howe Hall	1933	Colonial Revival		C	B
42	East Dowling Hall	1906	Queen Anne	W. G. Preston	C	B
43	Hillside Cottage	1904	Queen Anne/ Colonial Revival	W. G. Preston	C	B
44	garage	1912	(rusticated conc. block)		C	B
45	Baldwin Cottage	ca. 1900	Vernacular		C	B
46	Wallace Hall	1936	Colonial Revival		C	B
47	Administration	1933	Colonial Revival	Clarence P. Hoyt	C	B
48	Farrell Hall	1960	Modern		NC	B
49	Hospital/S. Bowen	1893-1907	Queen Anne	W. G. Preston	C	B
50	Greene Unit	1953-54	Modern	C. T. Main, Inc?	NC	B
51	Trapelo Cottage	ca. 1860	Greek Revival/Italianate		C	B
52	garage	1930	n/a		NC	B
53	Cardinal Cottage	ca. 1850	Greek Revival		C	B
54	garage	1947	n/a		NC	B
55	garage	ca. 1950	n/a		NC	B
56	garage	1930	n/a		NC	B
57	garage	1955	utilitarian		NC	B
58	Electric Sub Station	ca. 1960	utilitarian		NC	St
59	Cast iron fence	ca. 1890s	n/a		C	B
60	Kelley Hall	1969	Modern		NC	B
61	Activities Center	1980	Modern	CBT	NC	B
62	Withington Center	1979	Modern	Payette Ass.	NC	B
63	Eunice Shriver Center	1967	Modern	Caolo & Bienick Ass.	NC	B
64	Cottage #5	1976	Modern		NC	B
65	Cottage #6	1976	Modern		NC	B
66	Cottage #7	1976	Modern		NC	B
67	Cottage #8	1976	Modern		NC	B
68	Cottage #9	1976	Modern		NC	B
69	Cottage #10	1976	Modern		NC	B

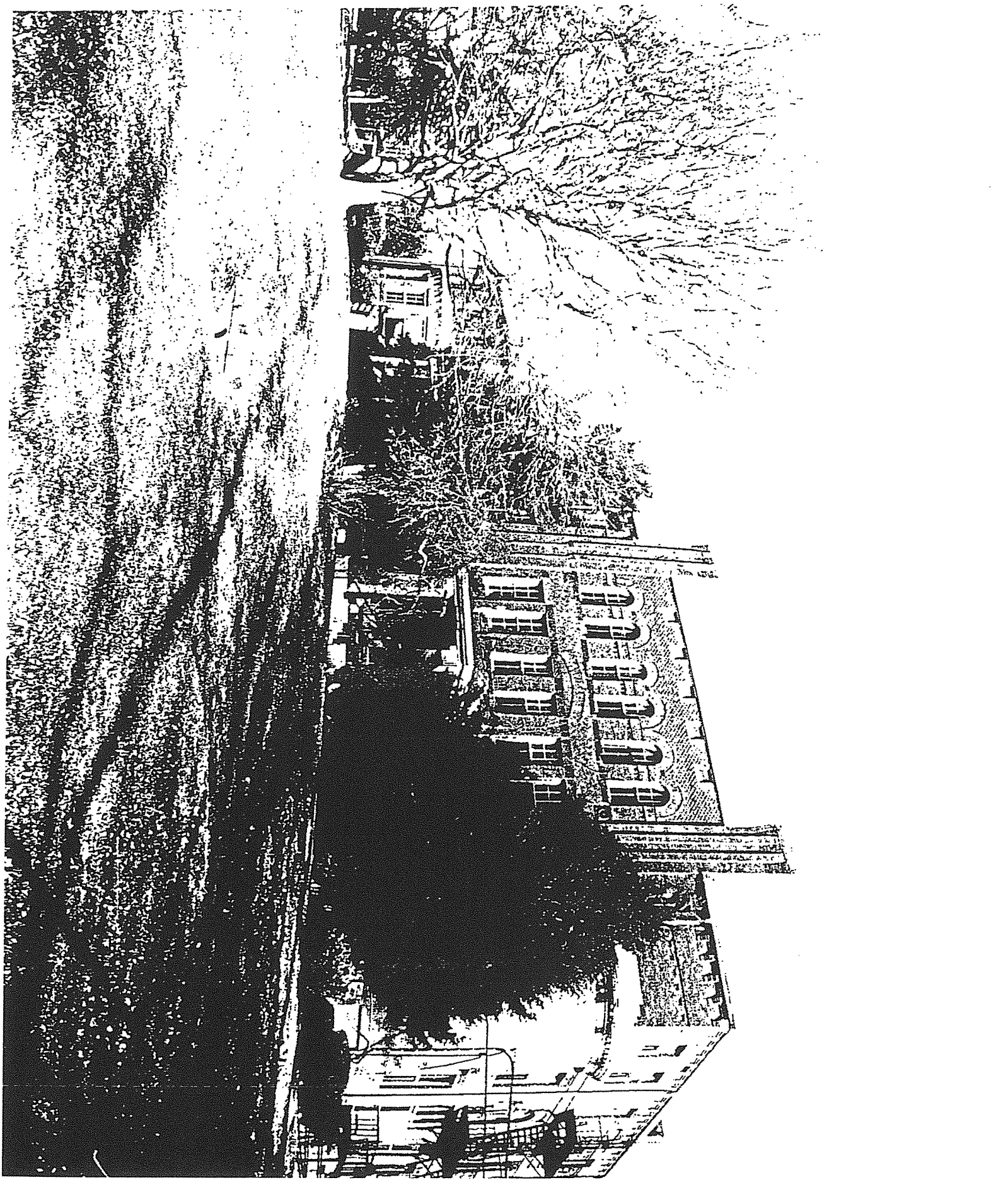


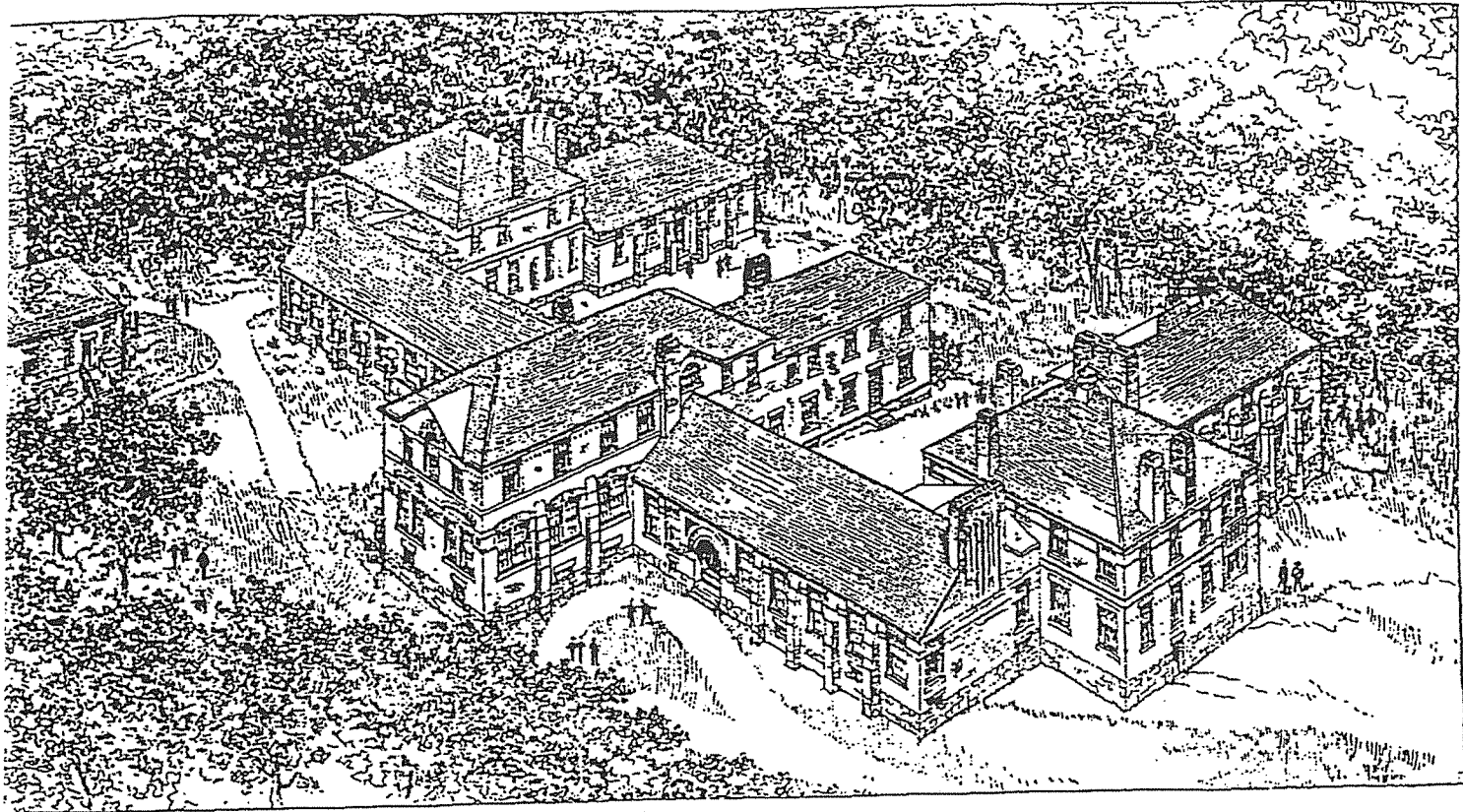
WALTER E. FERNALD STATE SCHOOL  
WALTHAM, MASSACHUSETTS  
DISTRICT DATA SHEET

MAP#	BUILDING NAME	DATE	STYLE	ARCHITECT/DESIGNER	STATUS	RESOURCE
70	Cottage 11	1976	Modern		NC	B
71	Cottage #12	1976	Modern		NC	B
72	Cottage #13	1976	Modern		NC	B
73	Cottage #3	1976	Modern		NC	B
74	Cottage #4	1976	Modern		NC	B
75	Brookside	1981	Modern		NC	B
76	Woodside	1981	Modern		NC	B
77	Site 5	1980s	Modern		NC	B
78	Open Pavillion	ca. 1970s	n/a		NC	B
79	Shed	ca. 1970s	Utilitarian		NC	St
80	Shed (concrete)	ca. 1970s	Utilitarian		NC	B
81	Garage (concrete)	ca. 1930s	Utilitarian		NC	B
82	Shed (concrete)	ca. 1970s	Utilitarian		NC	B
83	Malone Park 1	ca. 1990	Modern		NC	B
84	Malone Park 2	ca. 1990	Modern		NC	B
85	Malone Park 3	ca. 1990	Modern		NC	B
86	Malone Park 4	ca. 1990	Modern		NC	B
87	Pool/Playground	ca. 1960	n/a		NC	B
88	Chapel	1960	Colonial Revival	John A. McPherson	NC	St
89	Electric Sub Station	ca. 1960	Utilitarian		NC	B
90	Shed (wood)	ca. 1920	Utilitarian		NC	St
91	Activity Center Lawn	ca. 1891	n/a		C	B

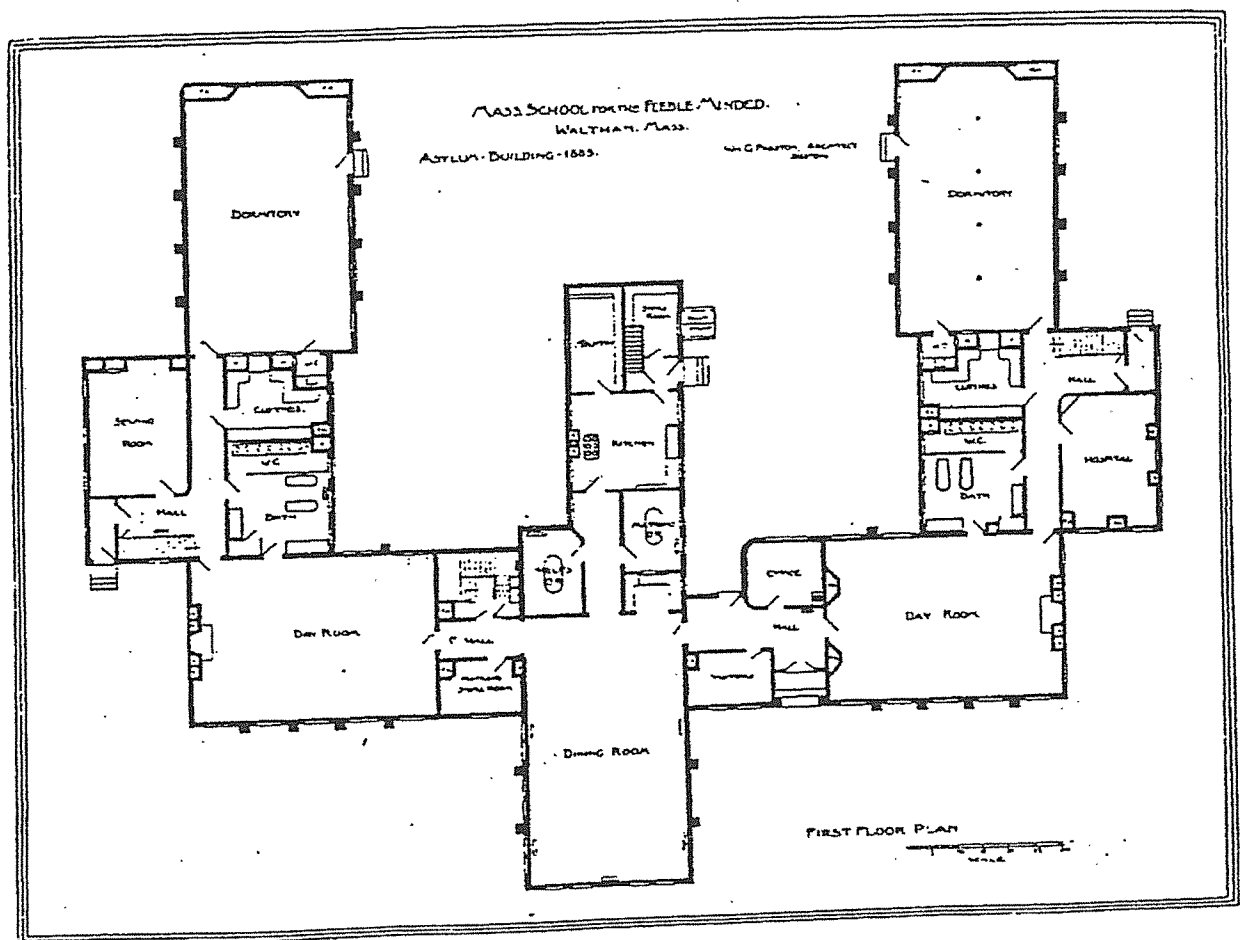
TOTAL RESOURCES: 48 Contributing; 42 Noncontributing

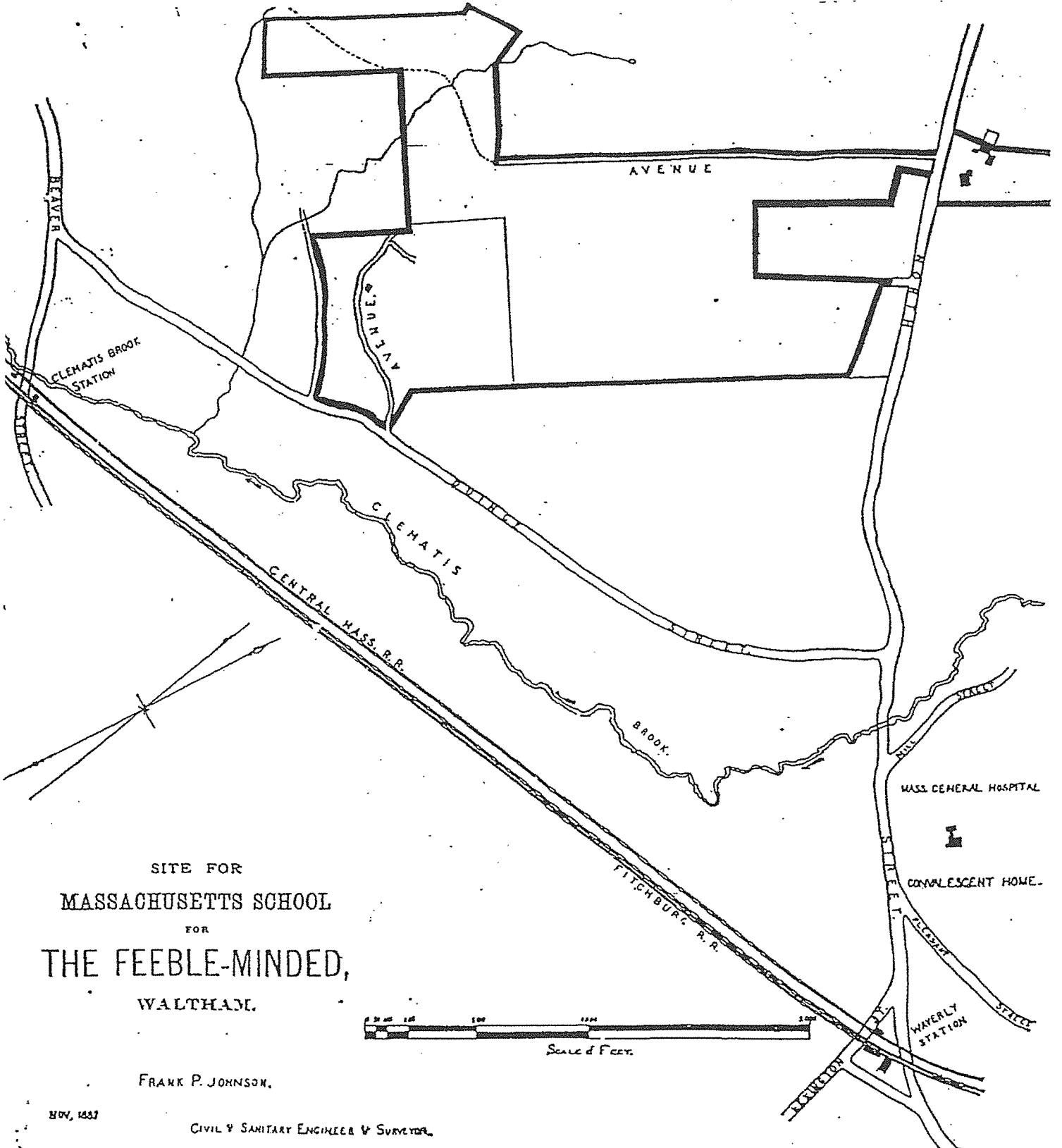
44 Contributing Buildings      38 Noncontributing Buildings  
 2 Contributing Sites                4 Noncontributing Structures  
 2 Contributing Structures





ASYLUM BUILDING... MASS. SCHOOL FOR THE FEEDLE-MINDED WALTHAM, MASS.



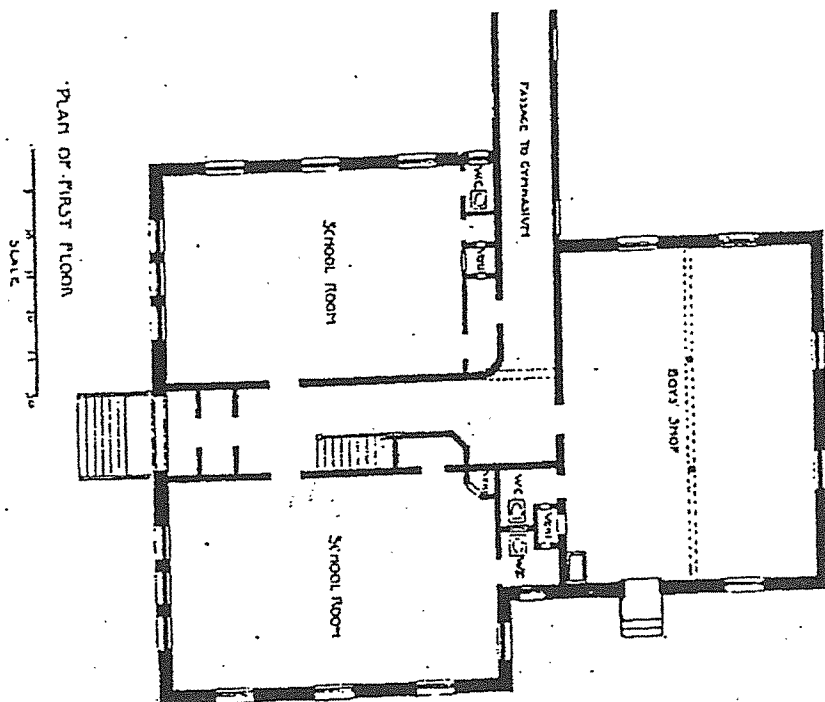
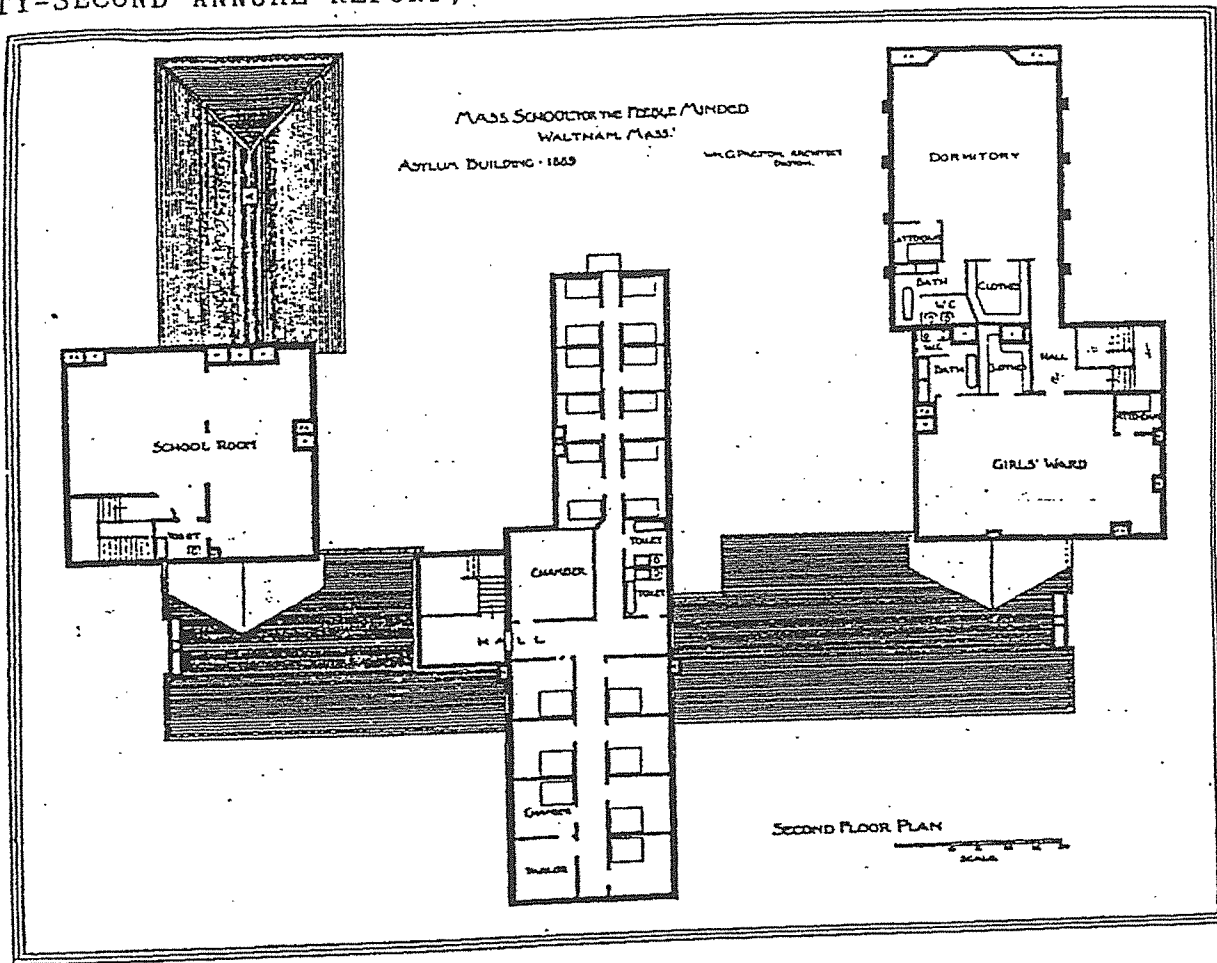


SITE FOR  
 MASSACHUSETTS SCHOOL  
 FOR  
 THE FEEBLE-MINDED,  
 WALTHAM.

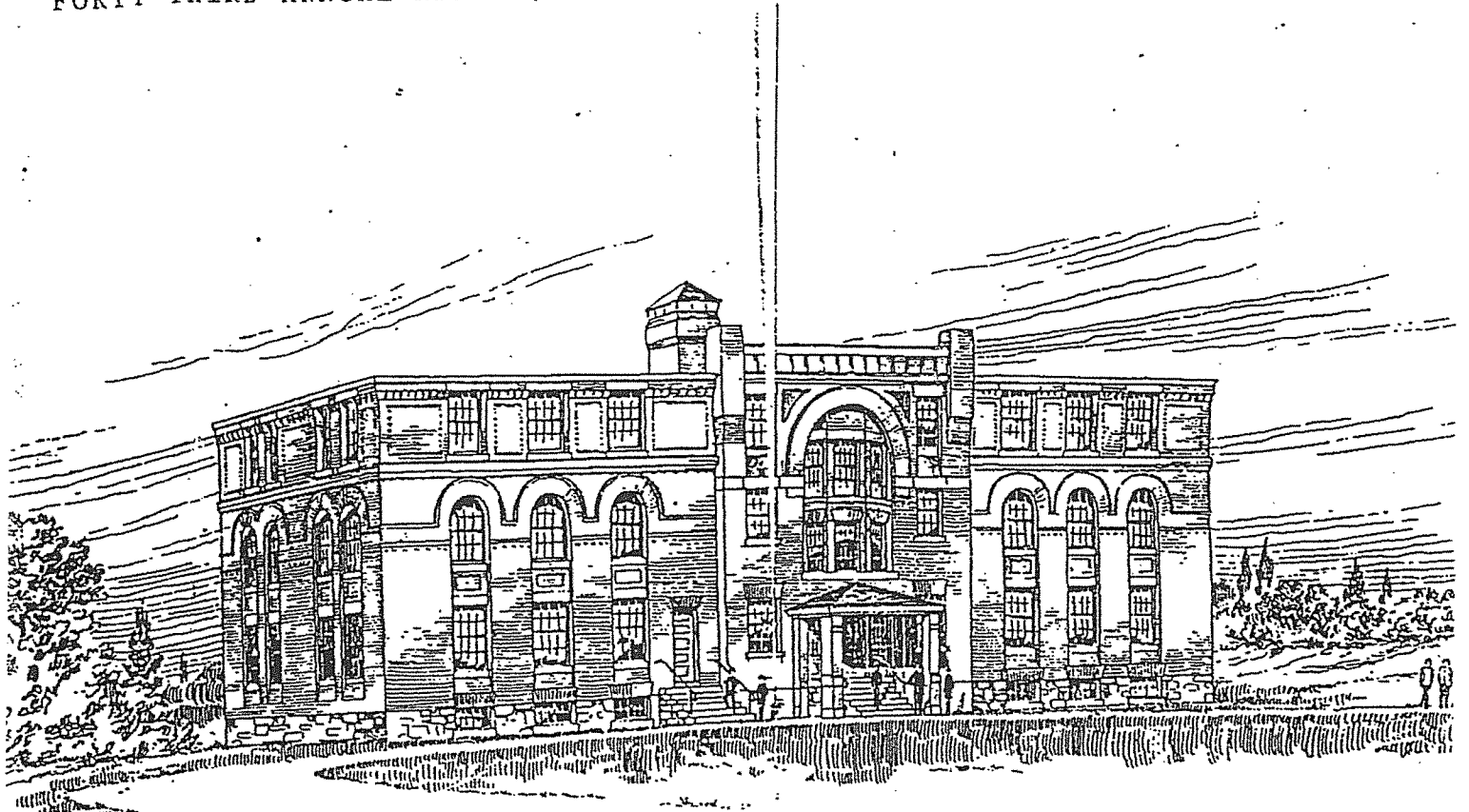
FRANK P. JOHNSON,

1887, 1887

CIVIL & SANITARY ENGINEER & SURVEYOR.

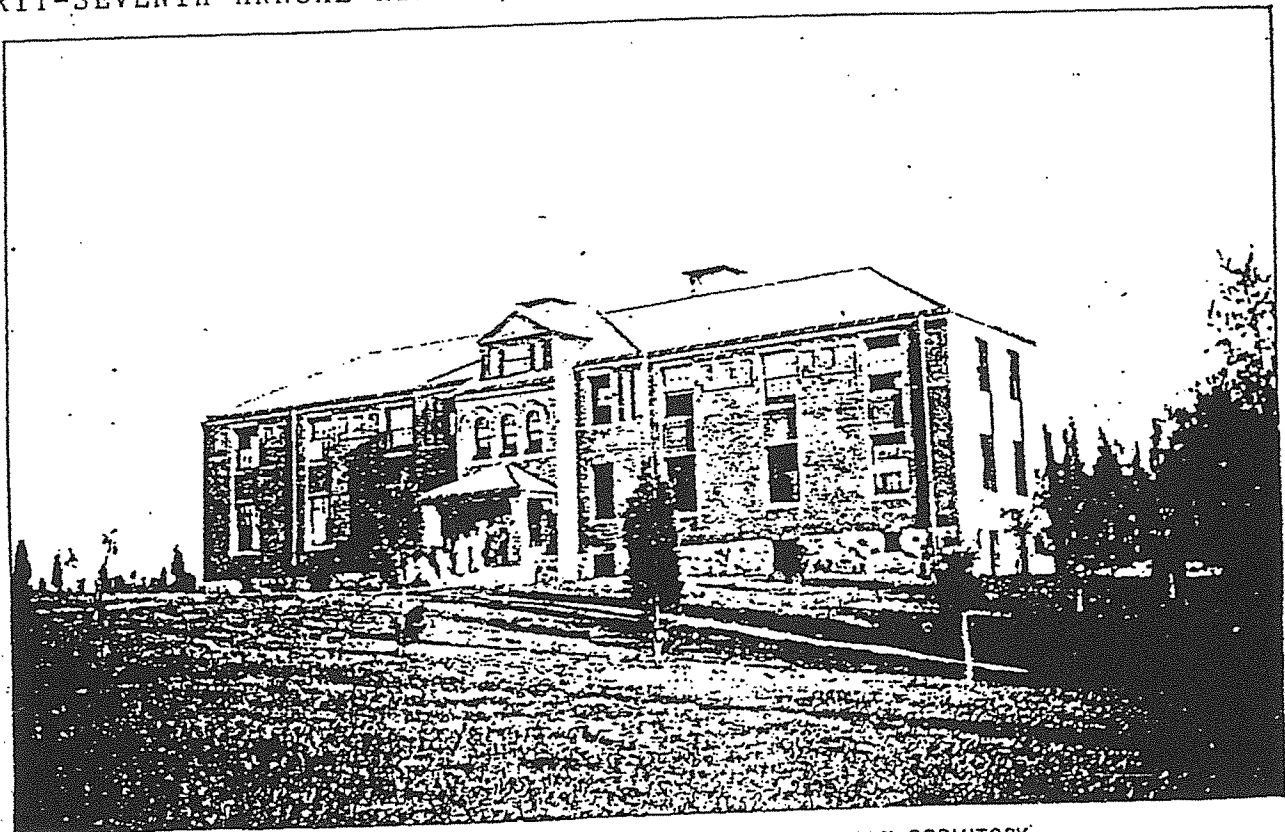


MASS. SCHOOL FOR THE FEEBLE MINDED  
 WALTHAM MASS  
 SCHOOL BUILDING, 1890  
 Wm. G. PRICHTON - ARCHT. Boston

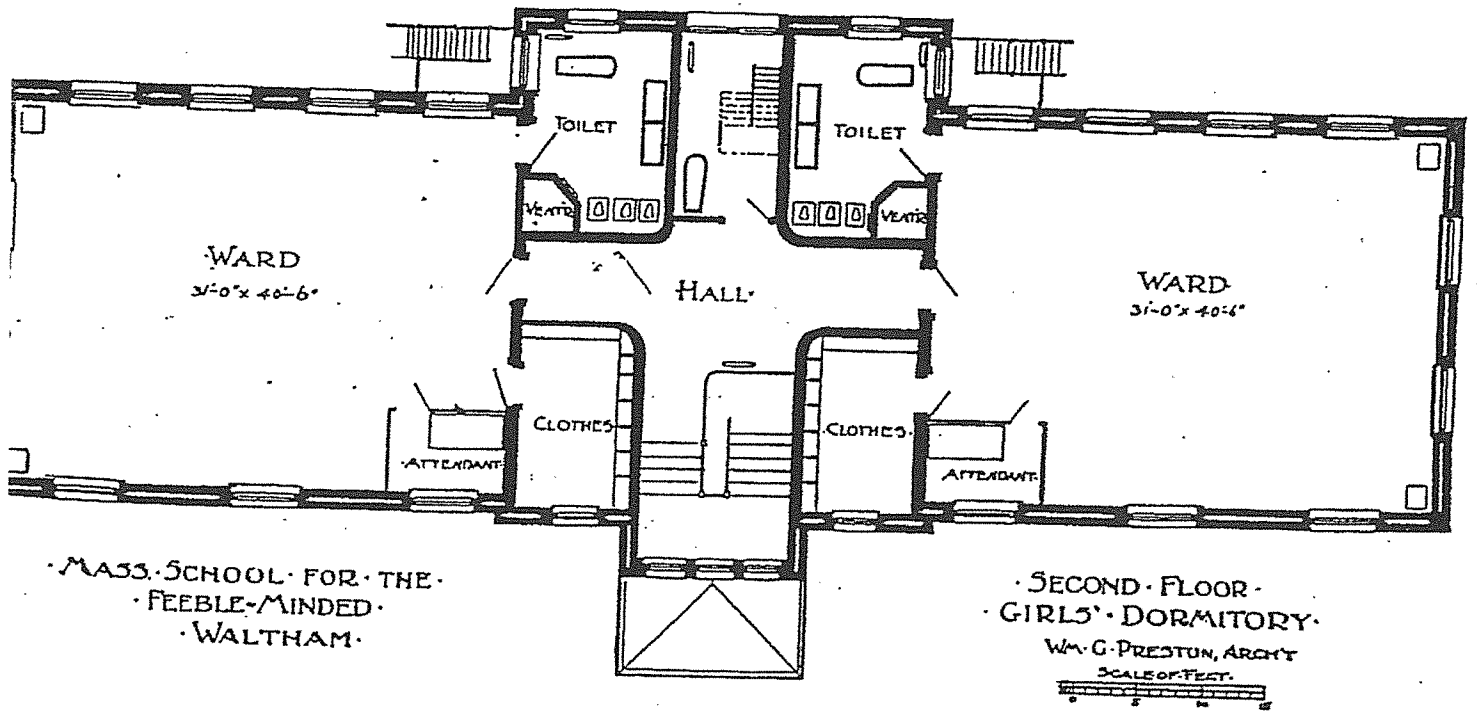
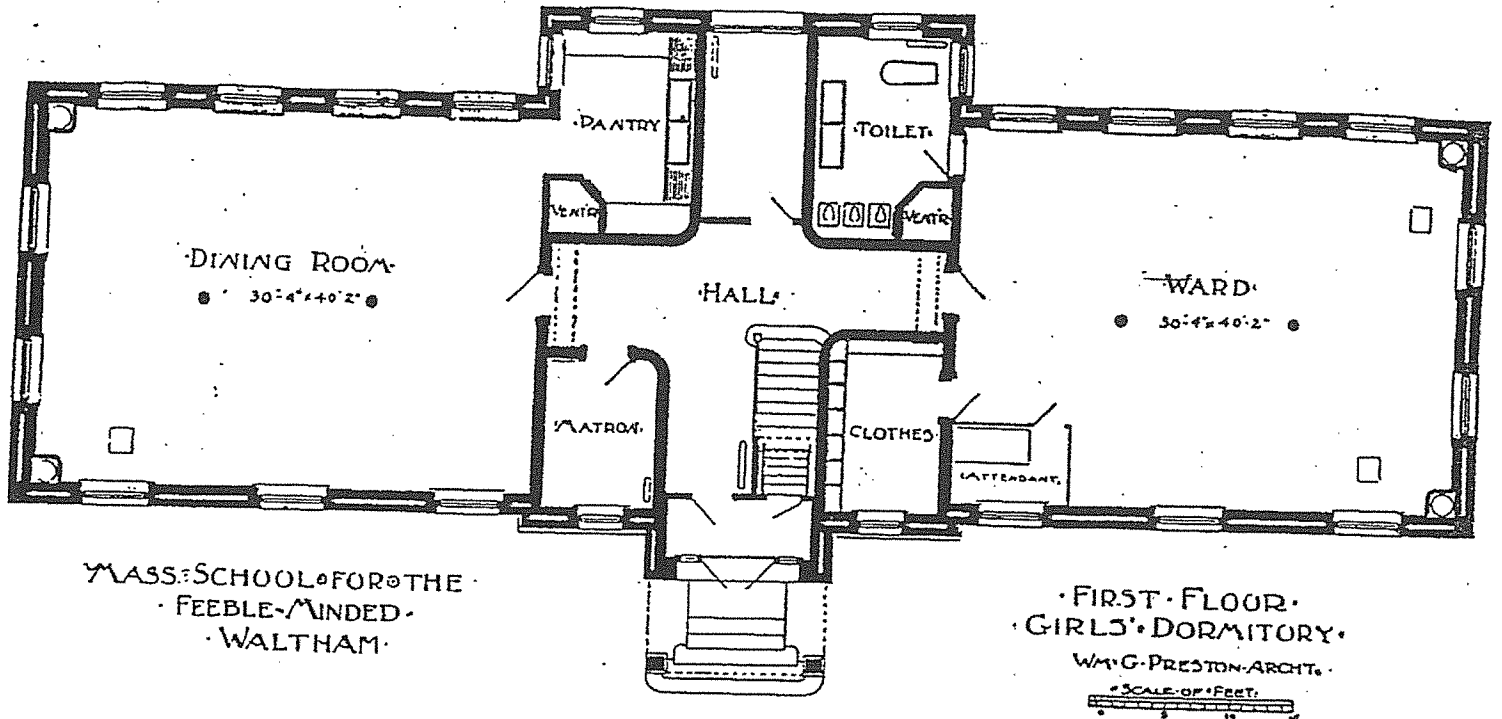


-DORMITORY- MASS. SCHOOL FOR THE FEEBLE-MINDED- WALTHAM- MASS-  
W. G. THORNTON ARCHITECT

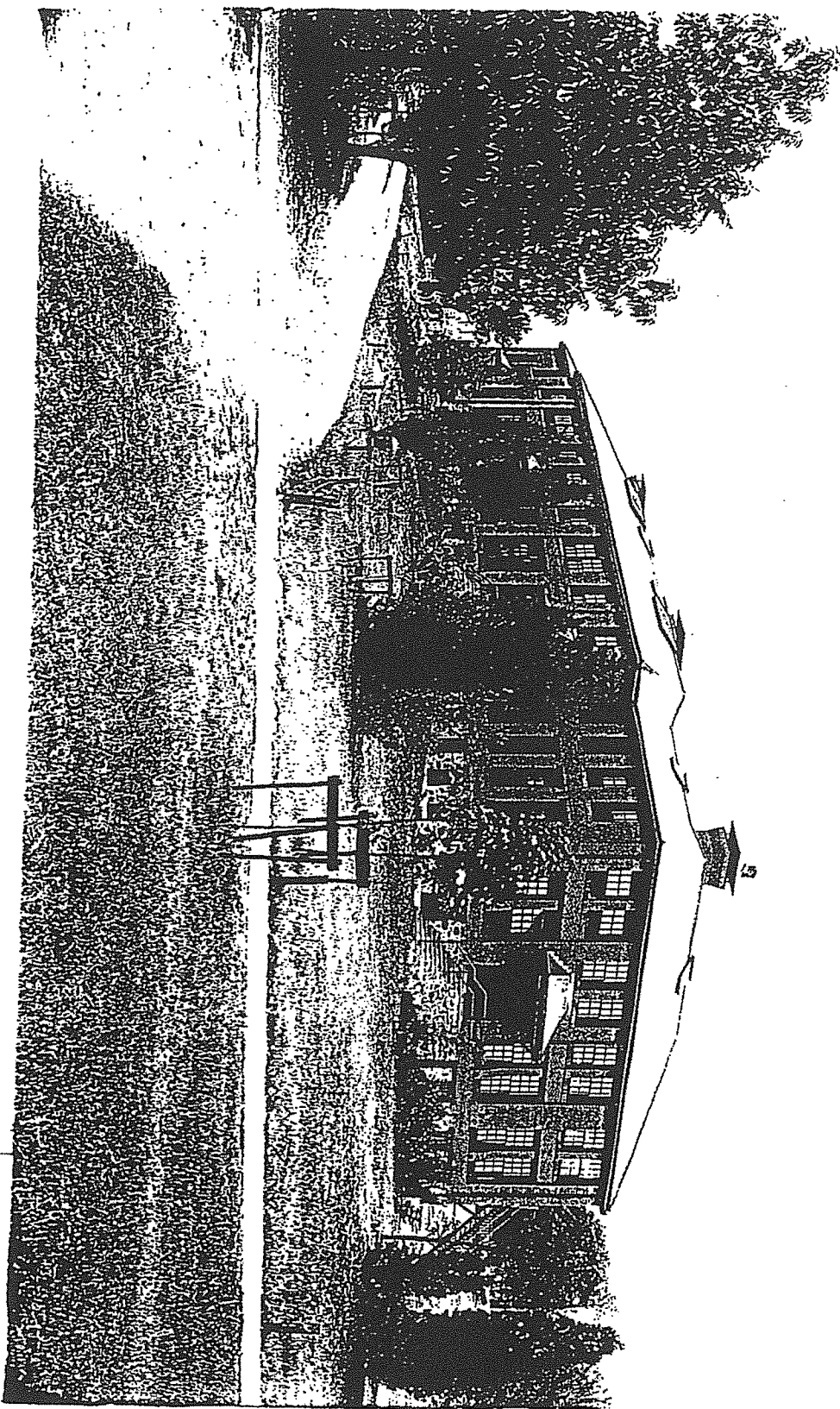
FORTY-SEVENTH ANNUAL REPORT; 1894



Massachusetts School for the Feeble-minded, Waltham. — GIRLS' DORMITORY.



MASS. STATE HOSPITAL & SCHOOLS  
WALTER E. FERNALD STATE SCHOOL  
WALTHAM, MASS.  
Manual Training Building  
c1910; Courtesy SPNEA  
Figure #13



3

WALTER E. FERNALD  
STATE SCHOOL  
WALTHAM, MASS.

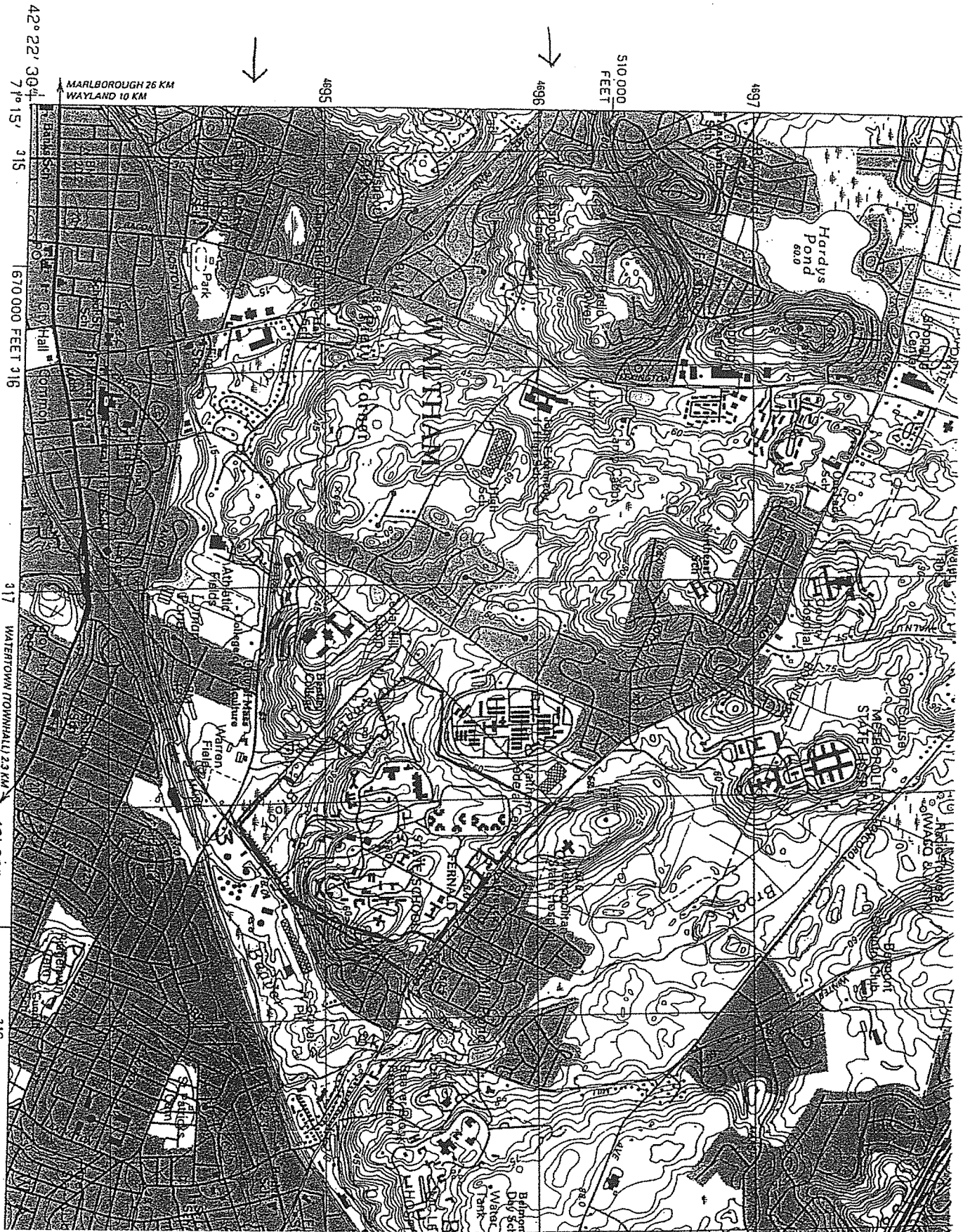


Mass. Hospitals & Schools  
Walter E. Fernald State School  
Waltham, MA

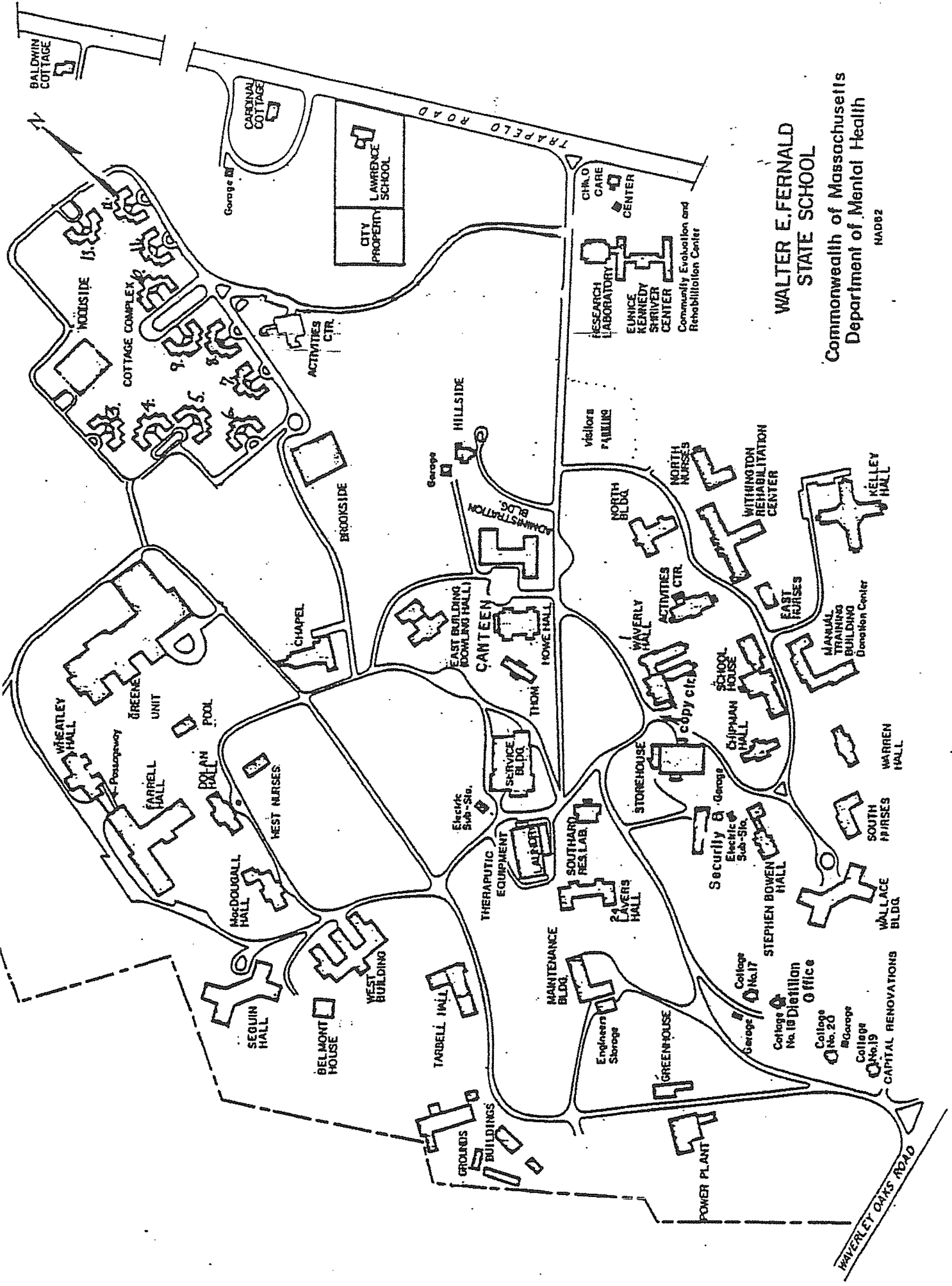


# MASSACHUSETTS

UTM REF. POINTS # 1 - 4



● INTERIOR-GEOLOGICAL SURVEY, RESTON, VIRGINIA-1988



**WALTER E. FERNALD  
STATE SCHOOL**  
Commonwealth of Massachusetts  
Department of Mental Health  
NA002

WAVERLEY OAKS ROAD

**APPENDIX C**  
**MEMO OF AGREEMENT**

MEMORANDUM OF AGREEMENT  
BETWEEN  
THE MASSACHUSETTS DIVISION OF CAPITAL ASSET MANAGEMENT AND  
MAINTENANCE, THE CITY OF WALTHAM,  
AND THE MASSACHUSETTS HISTORICAL COMMISSION

WHEREAS, the legislature has authorized the Massachusetts Division of Capital Asset Management and Maintenance (DCAMM) to enter into a disposition process to dispose of the approximately 180+-acre Walter E. Fernald Developmental Center Disposition Parcel (Parcel) located in the City of Waltham, MA (City) to the City; and

WHEREAS, the Parcel contains ninety-three (93) structures and landscape features constructed between the years of 1891 and ca.1990; and

WHEREAS, the City will have the right to develop the Parcel by and through private development for uses deemed appropriate by the City and subject to all federal, state and local permits and approvals; and

WHEREAS, the Parcel is listed in the State and National Registers of Historic Places as the Walter E. Fernald State School Historic District, a district listed as part of the Massachusetts State Hospitals and State Schools Multiple Property Listing; and

WHEREAS, the following buildings, structures and landscapes within the Parcel are listed as contributing resources in the District:

Building 1, Waverly Hall (1891); Building 2, North Building (1897); Building 3, Activity Center (1891); Building 4/5, Schoolhouse/Gymnasium (1891); Building 6, Chipman (1892); Building 7, North Nurses' Home (1904); Building 8, Waverly Hall Lawn (ca.1891); Building 9, East Nurses' Home (1906); Building 10, Manual Training (1904); Building 11, Warren Hall (1906); Building 12, South Nurses' Home (1907); Building 13, Thom Building (1952); Building 14, Power Plant (1921); Building 15, Main Garage (1932); Building 16, Storehouse (1891); Building 17, Cottage #17 (1925); Building 18, Cottage #18 (1925); Building 19, Cottage #19 (1925); Building 20, Cottage #20 (1925); Building #21, Southard Research Laboratory (1921); Building 22, Laundry (1928); Building 23, Lavers Hall (1914); Building 24, Maintenance (1930); Building 27, Engineer's Storage (ca.1930); Building 28, Barn Foundation (ca.1900); Building 29, Shed (ca.1920); Building 32, Tarbell Hall (1934); Building 33, West Building (1889-1890); Building 34, Belmont House (1890); Building 35, Seguin Hall (1934); Building 36, MacDougall Hall (1898); Building 37, Dolan Hall (1906); Building 38, West Nurses' Home (1906); Building 39, Wheatly Hall (1933); Building 40, Food Service Building (1931); Building 41, Howe Hall (1931); Building 42, East Dowling Hall (1906); Building 43, Hillside Cottage (1904); Building 44, Hillside Cottage Garage (1912); Building 45, Baldwin Cottage (ca.1900); Building 46, Wallace Hall (1936); Building 47, Administration (1933); Building 49, Hospital/S.Bowae (1893-1907); Building 51, Trapelo Cottage (ca.1860); Building 53, Cardinal Cottage (ca.1850); Building 59, Cast Iron Fence (ca.1890); Building 90, Shed (ca.1920); Building 91, Activity Center Lawn (ca.1891); and

WHEREAS, the following buildings and structures within the Parcel are listed as non-contributing resources in the District or were not included in the National Register Nomination:

Building 25, Greenhouse (ca.1940); Building 26, Electric Substation (ca.1960); Building 30, Shed (ca.1970); Building 31, Garage (ca.1950); Building 48, Farrell Hall (1960); Building 50, Greene Unit (1953-54); Building 52, Trapelo Cottage Garage (1930); Building 54, Garage (1947); Building 55, Garage (ca.1950); Building 56, Garage (1930); Building 57, Garage (1955); Building 58, Electric Sub Station (ca.1960); Building 60, Kelley Hall (1969); Building 61, Activities Center (1980); Building 62, Withington Center (1979); Building 63, Eunice Shriver Center (1967); Building 64, Cottage #5 (1976); Building 65, Cottage #6 (1976); Building 66, Cottage #7 (1976);

Building 67, Cottage #8 (1976); Building 68, Cottage #9 (1976); Building 69, Cottage #10 (1976); Building 70, Cottage #11 (1976); Building 71, Cottage #12 (1976); Building 72, Cottage #13 (1976); Building 73, Cottage #3 (1976); Building 74, Cottage #4 (1976); Building 75, Brookside (1981); Building 76, Woodside (1981); Building 77, Site 5 (1980); Building 78, Open Pavilion (ca.1970); Building 79, Shed (ca.1970); Building 80, Shed (ca.1970); Building 81, Garage (ca. 1930); Building 82, Shed (ca.1970); Building 83, Malone Park 1 (ca.1990), Building 84, Malone Park 2 (ca.1990); Building 85, Malone Park 3 (ca.1990); Building 86, Malone Park 4 (ca.1990); Building 87, Pool/Playground (ca.1960); Building 88, Chapel (1960); Building 89, Electric Sub Station (ca.1960); the Gazebo (ca. 1985); Shed (ca. 1974); Malone Park Comfort Station (ca. 1990); and

WHEREAS, the following contributing buildings and structures within the Parcel have been identified as in extremely poor condition making rehabilitation unlikely or are no longer extant:

Building 1, Waverly Hall (1891); Building 3, Activity Center (1891); Building 6, Chipman (1892); Building 17, Cottage #17 (1925); Building 18, Cottage #18 (1925); Building 29, Shed (c.1920) Building 33, West Building (1889-1890); Building 39, Wheatly Hall (1933); Building 42, East Dowling Hall (1906); Building 44, Hillside Cottage Garage (1912); Building 49, Infirmary/Stephen Bowne Hall (1893, 1901, 1907); Building 90; Shed (wood; c.1920); and

WHEREAS, the City may prepare and issue a Request for Proposals (RFP) for the sale or lease and redevelopment of the Parcel; and

WHEREAS, the transfer by disposition of the Parcel constitutes a project undertaken by a State agency pursuant to 950 CMR 71.03 and is a project for which DCAMM and the City have sought the comments of the Massachusetts Historical Commission (MHC) pursuant to M.G.L. Chapter 9, Section 26-27C, as amended by Chapter 254 of the Acts of 1988 (950 CMR 71.00); and

WHEREAS, MHC has determined that the proposed project will have an adverse effect on the historic property pursuant to 950 CMR 71.05(e) through the disposition of a State Register property; and

WHEREAS; no feasible or prudent alternative exists to eliminate the adverse effect of the proposed disposition; and

WHEREAS, MHC has determined to accept the adverse effect of the disposition of the Parcel in consideration of the mitigation alternatives described herein; and

WHEREAS, MHC, DCAMM and the City agree, and the Waltham Historical Commission (WHC) hereby concurs, that the project shall be undertaken and implemented in accordance with the following stipulations to mitigate the effect of the disposition of the Parcel in compliance with M.G.L. Chapter 9, Section 27C.

#### STIPULATIONS

DCAMM and the City shall ensure that the following measures are carried out in coordination with MHC and WHC, as set forth below:

I. Redevelopment of the Disposition Parcel

A. The City is encouraged to include historic preservation in any redevelopment process. Options for redevelopment of the Parcel which incorporate historic preservation should take into account the following principles of reuse planning:

1. Preservation of the character-defining features of the contributing buildings, structures and landscapes on the Parcel should be encouraged where feasible.

2. If it is determined that it is not feasible to preserve all of the character-defining features of the contributing buildings, structures and landscape features on the Parcel, the feasibility of preserving character-defining features of portions of the contributing buildings, structures and landscape features will be examined and encouraged where feasible.
3. Rehabilitation of contributing buildings, structures and landscape features on the Parcel should be consistent with recommended approaches in the Secretary of the Interior's Standards for Rehabilitation of Historic Properties, (hereinafter "Standards").
4. Rehabilitation of buildings identified as in extremely poor condition in this MOA will be encouraged, but demolition of the buildings may proceed provided each demolition complies with Stipulation V.

## II. Marketing Plan and Request for Proposals

- A. Notwithstanding any provisions of this MOA, the City will have full marketing authority for the Parcel and will make all final marketing decisions. The City will consult with MHC and WHC on developing a marketing plan for the Parcel which shall include the following elements:
  1. An advertising plan and schedule for publicizing the availability of the RFP.
  2. An initial distribution list for notice of availability of the RFP which will include any contacts offered by MHC and WHC.
  3. A schedule for receiving and reviewing submissions in response to the RFP.
- B. The City will provide a draft marketing plan to MHC and WHC. MHC and the WHC will have fourteen (14) days to review and comment on the draft marketing plan. If MHC or WHC does not find the draft marketing plan acceptable, the City will make reasonable efforts exercised in good faith to accommodate the concerns of MHC and WHC and will submit a final marketing plan. Before implementation, MHC and WHC will have seven (7) days to review and comment on the portions of the final marketing plan which address issues of historic preservation. In the event MHC and WHC do not provide initial comments on the draft marketing plan within 14 days or comments on the final marketing plan within 7 days, the plan shall be deemed acceptable to MHC and WHC. It is understood that the content of the marketing plan shall not require approval of MHC or WHC.
- C. Concurrent with the development of a marketing plan, the City will prepare the RFP for the disposition of the Site. The City will consult with MHC and WHC on developing the RFP which shall include the following elements:
  1. An appendix to the RFP that includes the National Register Nomination form and the Historic Resources Existing Conditions Memorandum compiled by Epsilon Associates. The appendix should refer to the MHC and National Park Service websites for additional information on the State and Federal Historic Tax Credit programs.
  2. A photograph and parcel map of the Parcel.
  3. Reference to the points listed under I.A. of this MOA. The RFP as a whole will make a good faith effort to generate interest in the preservation of what MHC has defined as the historic character of the Parcel.
- D. The City will provide a confidential draft RFP to MHC and WHC. MHC and WHC will have fourteen (14) days to review and comment on those portions of the draft RFP which address issues of historic preservation. Before issuance of the final RFP, MHC and WHC will have seven (7) days to review and comment on the portions of the final RFP which address issues of historic preservation. In the event MHC and WHC do not provide initial comments on the draft RFP within 14 days or comments

on the final RFP within 7 days, the RFP shall be deemed acceptable to MHC and WHC. It is understood that the content of the RFP shall not require approval of MHC or WHC. It is further understood that MHC and WHC will not share any portion of the RFP with anyone prior to the time the RFP is made publicly available by the City.

- E. The marketing effort shall be continued for no less than three months from the date of the issuance of the RFP. Issuance shall occur when the notice of availability of the RFP is published in the Central Register.
- F. The City will schedule a Bidder's Conference for prospective developers to occur at the midpoint of the marketing effort during which MHC and WHC will have the opportunity to present information and to answer questions from prospective developers.
- G. Once proposals from developers are received by the City in response to the RFP, MHC and WHC shall be afforded the opportunity to comment on the proposals and to provide these comments in writing to the City prior to any interviews which the City may conduct with any of the developers. If, after a consultation period of no more than thirty (30) days with MHC and WHC regarding the applicability of the Standards to the proposals and taking into consideration MHC and WHC comments during any interviews which the City may conduct with any of the developers during the RFP marketing period, the City, in their sole determination, have received no proposals that are feasible and acceptable that provide for rehabilitation or new construction in conformance with the recommended approaches in the Standards, they will convey their conclusions to MHC and WHC.
  - 1. For all buildings, structures and landscape features for which there is no preservation proposal that is feasible and acceptable to the City, then the City or any new owners of any part of the Parcel or any other person may proceed, subject to any other applicable reviews and permits, with demolition of buildings and structures or rehabilitation or new construction that does not conform to the Standards following completion of photographic recordation and documentation as stipulated in Section V.

### III. New Construction

- A. The City shall encourage new buildings and structures that are sympathetic or compatible to what MHC has determined to be character-defining attributes of the contributing buildings, structures and landscape features on the Parcel.
- B. If new construction is proposed on previously undisturbed land within the Disposition Parcel, the City shall consult with the MHC to determine if an archaeological survey is required prior to any ground disturbing activities are undertaken on the land.
- C. If construction or modifications to the landscape are proposed in the vicinity of the West Building, an archaeological survey must be conducted in the area identified in the National Register Nomination as "a small area...enclosed by a decorative wrought iron fence" to determine if an unmarked cemetery is present that should be avoided.

### IV. Exempted Activities

A. The following construction activities are unlikely to affect what MHC regards as the character-defining attributes of the Parcel and are exempted from further review by MHC, including comments in any environmental review process:

- 1. Resurfacing, maintenance, repair or improvement of existing parking lots, roads and driveways.
- 2. Repair, replacement or improvements to infrastructure, i.e. heating and electrical systems, sewer, water, ventilation systems or plumbing.



- 3. Maintenance work such as painting, repair or replacement of substantially in-kind architectural elements.
- 4. All interior work.
- 5. Demolition or alteration of non-contributing structures.
- 6. New construction on the Parcel within existing building sites that is consistent with the design guidelines set forth in Section III.

V. Photographic Recordation and Documentation

- A. Prior to demolition of any contributing building or structure, substantial new construction or other major change to any part of the Parcel, the City shall require that the buildings and structures on that part of the Parcel are documented by photographs and narratives in accordance with a "recordation plan" that satisfies all of the following:
  - 1. Provides for documentation of the historical processes that shaped the organization, design and history of the Fernald Developmental Center. (The nomination of the Fernald State School to the National Register by MHC is sufficient documentation.)
  - 2. Contains photographs and documentation of the character-defining attributes.
  - 3. Provides that copies of the resulting documentation are made available to WHC.

VI. Historic Rehabilitation Tax Credits

- A. Rehabilitation of buildings and landscape features that contribute to the National Register District may qualify for State and/or Federal tax credits. The City shall encourage any third party developer to consult with MHC and the National Park Service to determine if the buildings are eligible for tax credits and if the proposed work meets the Secretary of the Interior's Standards for Rehabilitation allowing for the award of tax credits.

VII. Modifications

Any party to this MOA may request that it be amended or modified whereupon the parties will consult in accordance with 950 CMR 71 to consider such amendment or modification.

Executed on this 18 day of December, 2014.

City of Waltham

By: Jannet G. McCullough  
Title: MAYOR

Division of Capital Asset Management and Maintenance (DCAMM)

By: Carole J. Corubon  
Title: Commissioner

Massachusetts Historical Commission (MHC)

By: Brona Simon 12/19/14  
Title: Executive Director

Waltham Historical Commission (WHC)

By: Thomas Alexander Green 12/18/14  
Title:

## TABLE OF USES

ZONING CODE

Z Attachment 4

City of Waltham

Sec. 3.4. Table of Uses.

[Amended 6-10-1991 by Ord. No. 27154; 6-10-1991 by Ord. No. 27156; 12-12-1991 by Ord. No. 27265; 12-23-1991 by Ord. No. 27265; 3-8-1993 by Ord. No. 27503; 5-9-1994 by Ord. No. 27715; 5-23-1994 by Ord. No. 27732; 1-11-1995 by Ord. No. 27853-A; 3-28-1995 by Ord. No. 27884; 5-22-1995 by Ord. No. 27909; 5-13-1996 by Ord. No. 28125; 5-28-1996 by Ord. No. 28135; 8-4-1997 by Ord. No. 28403; 2-26-2001 by Ord. No. 29197; 5-28-2002 by Ord. No. 29513; 12-23-2002 by Ord. No. 29628; 3-1-2005 by Ord. No. 30012; 4-28-2008 by Ord. No. 30876; 12-22-2008 by Ord. No. 31011; 6-23-2009 by Ord. No. 31147; 6-27-2011 by Ord. No. 31583; 10-16-2013 by Ord. No. 32037; 12-9-2013 by Ord. No. 32080; 1-13-2014 by Ord. No. 32097; 6-23-2014 by Ord. No. 33106; 3-14-2016 by Ord. No. 33408; 3-27-2017 by Ord. No. 33702; 8-1-2017 by Ord. No. 33817; 9-10-2018 by Ord. No. 34192; 12-10-2018 by Ord. No. 34282; 4-22-2019 by Ord. No. 34437; 5-28-2019 by Ord. No. 34472; 2-24-2020 by Ord. No. 34743; 2-22-2021 by Ord. No. 35039]

Use With Special Permit Reference	RA-1	RA-2	RA-3	RA-4	RB	RC	RD	HR1	HR2	BA	BB	BC(1)	LC	C	I	C/R	Use Reference
<b>Residential</b>																	
Single-family detached (Sec. 3.606)	Y	Y	Y	Y	Y	Y	Y	Y	N	S1	S1	N	N	N	N	N	3.21
Two-family detached (Sec. 3.607)	N	N	N	N	Y	Y	Y	N	N	S1	S1	N	N	N	N	N	3.22
Accessory dwelling units (Sec. 3.616)	S2	S2	S2	S2	N	N	N	N	N	N	N	N	N	N	N	N	3.23
<b>Multifamily dwellings (Sec. 3.618)</b>																	
Rooming houses	N	N	N	N	N	Y1	Y1	Y	Y1	Y1	Y1	Y1	N	N	N	N	3.24
Lodging houses (Sec. 3.639)	Y	Y	Y	Y	Y	Y1	Y1	Y	N	Y1	Y1	Y1	N	N	N	N	3.25
Hotels/motels (Sec. 3.617)	N	N	N	N	N	S1	S1	N	N	S1	S1	S1	N	N	N	N	3.26
Family day-care homes (Sec. 3.609)	N	N	N	N	N	S1	S1	N	N	S1	S1	S1	S1	S1	N	N	3.27
Medical offices in residences	Y	Y	Y	Y	Y	Y	Y	Y	Y	S1	S1	S1	N	N	N	N	3.28
Customary home occupations (Sec. 3.611)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	3.29
Accessory uses/residential (Sec. 4.22)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	3.210
Garage, private	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	3.211
Trailer/mobile home	N	N	N	N	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	3.212
<b>Institutional</b>																	
Churches	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	3.213
Educational uses	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	3.214
Municipal buildings	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	3.215
Cemeteries	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	3.216
Hospitals, sanatoriums, nursing homes, philanthropic institutions (Sec. 3.610)	S1	S1	S1	S1	S1	S1	S1	Y (3.811)	Y (3.811)	S1	S1	S1	N	N	N	N	3.217
									(3.811)				N	N	N	N	3.218

KEY:

Y = Permitted use as of right  
 N = Not permitted  
 Y1 = Permitted by right and additional intensity of use permitted by special permit from the City Council  
 S1 = Use permitted only by special permit by City Council  
 S2 = Use permitted only by special permit by Board of Appeals

Z Attachment 4:1

CITY OF WALTHAM

Sec. 3.4. Table of Uses.

Use With Special Permit Reference	RA-1	RA-2	RA-3	RA-4	RB	RC	RD	HR1	HR2	BA	BB	BC(I)	LC	C	I	C/R	Use Reference
Assisted living facilities	N	N	S1	S1	S1	S1	S1	Y1	Y1	S1	S1	N	N	N	N	N	3.218A
Cat shelter	S1	S1	S1	S1	S1	S1	S1	N	N	S1	S1	S1	Y	Y	Y	N	3.218B
Public service corporations (Sec. 3.614)	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	N	S2	S2	N	3.219
Membership clubs (Sec. 3.608)	S1	S1	S1	S1	S1	S1	S1	S1	S1	S1	Y1	Y1	N	Y1	Y1	S1	3.220
Garages, public	N	N	N	N	N	N	N	Y (3.811)	Y (3.811)	Y1 (3.811)	Y1	Y1	Y1	Y1	Y1	N	3.221
<b>Commercial</b>																	
Retail stores (Sec. 3.634)	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	Y1	Y1	N	3.222, 3.27
Body art establishments (Sec. 3.222A)	N	N	N	N	N	N	N	N	N	N	S1	S1	N	S1	S1	N	2.347
Laundromats	N	N	N	N	N	N	N	N	N	N	Y1	Y1	N	Y1	Y1	N	3.223
Business and professional offices and banks	N	N	N	N	N	N	N	Y (3.811)	S1 (3.811)	Y1	Y1	Y1	Y1	Y1	Y1	N	3.224
Organ procurement organization	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	3.224A
Drive-in customer service (Sec. 3.635)	N	N	N	N	N	N	N	N	N	S1	S1	S1	S1	S1	S1	N	3.225
Arcades	N	N	N	N	N	N	N	N	N	N	N	N	N	Y1	Y1	N	3.226
Retail gasoline stations (Sec. 3.634)	N	N	N	N	N	N	N	N	N	Y1	Y1	N	N	Y1	Y1	N	3.227
Restaurants	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	Y1	Y1	N	3.228
Retail bakery	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	Y1	Y1	N	3.228C
Delicatessen	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	Y1	Y1	N	3.228D
Fast-food establishments (Sec. 3.620)	N	N	N	N	N	N	N	N	N	S1	S1	N	N	S1	S1	N	3.229
Taverns	N	N	N	N	N	N	N	N	N	N	Y1	N	N	Y1	Y1	N	3.230
Micro-brewery restaurant	N	N	N	N	N	N	N	N	N	N	N	Y	S1	N	N	N	3.228A
Catering establishments	N	N	N	N	N	N	N	N	N	N	Y1	N	N	Y1	Y1	N	3.231
Funeral homes	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	Y1	Y1	N	3.232
Private schools	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	Y1	Y1	N	3.233
Radio and television broadcasting studios	N	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	Y1	Y1	N	3.234
Radio, television, microwave, communication, radar or other tower (Sec. 3.621)	N	N	N	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	3.234

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ZONING CODE

Sec. 3.4. Table of Uses.

Use With Special Permit Reference	RA-1	RA-2	RA-3	RA-4	RB	RC	RD	HRI	HR2	BA	BB	BC(I)	LC	C	I	C/R	Use Reference
Indoor theaters	N	N	N	N	N	N	N	N	N	N	N	N	SI	SI	SI	N	3.235
Newspaper publishing and printing	N	N	N	N	N	N	N	N	N	N	Y1	Y1	N	Y1	Y1	N	3.236
Car wash (Sec. 3.622)	N	N	N	N	N	N	N	N	N	N	SI	N	N	SI	SI	N	3.237
Wholesale, storage and warehousing	N	N	N	N	N	N	N	N	N	N	Y1	N	N	Y1	Y1	N	3.238
Off-street parking (Sections 3.601 through 3.605)	Y	Y	Y	Y	SI	SI	SI	Y (3.811)	Y (3.811)	Y	Y	Y	Y	Y	Y	N	3.239
Used car lot (Sec. 3.632)	N	N	N	N	N	N	N	N	N	N	SI	N	N	SI	SI	N	3.240
Associated commercial recreation (Sec. 3.636)	N	N	N	N	N	N	N	N	N	SI	SI	SI	SI	SI	SI	N	3.267
Accessory uses/commercial	N	N	N	N	N	N	N	Y (3.811)	Y (3.811)	Y	Y	Y	Y	Y	Y	Y	3.241
Tea shop	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	Y1	Y1	Y1	N	3.228B
Animal shelter (Sec 3.643)	N	N	N	N	N	N	N	N	N	N	N	N	SI	SI	SI	N	3.226D
Kennel (Sec. 3.644)	N	N	N	N	N	N	N	N	N	N	N	N	SI	SI	SI	N	3.226E
Medical marijuana treatment center (Sec. 11.210)	N	N	N	N	N	N	N	N	N	N	N	N	N	SI	SI	N	Use Reference Article XI
Medical marijuana cultivation (Sec. 11.28)	SI	SI	* SI	SI	SI	SI	SI	SI	SI	SI	SI	SI	SI	SI	SI	SI	Use Reference Article XI
Electronic game center	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	3.226G
Marijuana establishments (nonmedical marijuana)	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	
Commercial marijuana cultivation (nonmedical marijuana)	N	N	N	N	N	N	N	N	N	N	N	N	N	SI	SI	N	
Smoke shop (Sec. 3.647)	N	N	N	N	N	N	N	N	N	SI	SI	SI	N	SI	SI	N	3.222B
Cafe	N	N	N	N	N	N	N	N	N	Y1	Y1	Y1	N	Y1	Y1	N	3.228E
Industrial																	
Accessory off-street parking	N	N	N	N	N	N	N	Y (3.811)	Y (3.811)	N	Y	Y	Y	Y	Y	N	3.242
Railroad and transit station	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	
Windmills	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y1	Y1	N	N	Y1	Y1	N	3.243
Electric lighting, gas works and power stations	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	3.244
Fuel oil and gas storage	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	3.245

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CITY OF WALTHAM

Sec. 3.4. Table of Uses.

Use With Special Permit Reference	RA-1	RA-2	RA-3	RA-4	RB	RC	RD	HR1	HR2	BA	BB	BC(1)	LC	C	I	C/R	Use Reference
Heavy trucking and equipment storage (Sec. 3.628)	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	N	3.247
Open storage	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	3.248
Truck or private bus terminals	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	Y1	N	3.249
Light manufacturing (Sec. 3.623)	N	N	N	N	N	N	N	N	N	N	S1	N	Y1	Y1	N	3.250	
Research labs, structures and accessory uses	N	N	N	N	N	N	N	Y (3.811)	S1 (3.811)	N	N	N	Y1	Y1	Y1	N	3.251
General manufacture	N	N	N	N	N	N	N	N	N	N	N	N	N	Y1	Y1	N	3.252
Autobody shop (Sec. 3.626)	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	N	3.253
Plastics manufacturing (Sec. 3.629)	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	N	N	3.254
Steam laundry	N	N	N	N	N	N	N	N	N	N	N	N	N	Y1	Y1	N	3.255
Heliports-airports (Sec. 3.627)	N	N	N	N	N	N	N	S1	S1	N	N	N	S1	S1	N	N	3.256
Junkyards (Sec. 3.633)	N	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	N	3.257
Garbage dumps and sanitary landfills	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	3.258
Composting facility (3.640)	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	N	3.2581
Yard waste transfer station (3.641)	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	N	3.2582
Organic products storage (3.642)	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	N	3.2583
Automobile recycling center	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	N	3.259
Accessory uses/manufacturing	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	N	3.260
Adult entertainment enterprises (Sec. 2.303A)	N	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	N	3.2421
<b>Agriculture</b>																	
Farms	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	3.261
Livestock farms under 5 acres (Sec. 3.612)	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	S2	N	3.262
Livestock farms over 5 acres	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	3.262
Farm stands	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	3.263
<b>Conservation/Recreation</b>																	
Conservation, water and water supply area	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	3.264
Public outdoor recreation facility	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	3.265
Semipublic outdoor recreation facility (Sec. 3.630)	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	S1	3.266

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ZONING CODE

Sec. 3.4. Table of Uses.

Use With Special Permit Reference	RA-1	RA-2	RA-3	RA-4	RB	RC	RD	HR1	HR2	BA	BB	BC(1)	LC	C	I	C/R	Use Reference
Conservation/Recreation																	
Nonprofit sports/recreational clubs with grounds for games and sports	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	S1	Y1	3.220A
Commercial recreational facilities, outdoor	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	S1	Y1	3.226B
Commercial recreational facilities, indoor (Sec. 3.608A)	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	S1		3.226A
Commercial conservation/nature facilities	N	N	N	N	N	N	N	N	N	N	N	N	S1	S1	S1	S1	3.226C
Small athletic and fitness facilities, indoor	N	N	N	N	N	N	N	N	N	Y	Y	Y	Y	Y	Y	N	Use Reference 3.226F

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NOTES:

(1) Residential uses shall only be allowed in the BC District on upper floors (floors two through five) unless development occurs as part of a Riverfront Overlay District special permit (See Section 8.4.) or as part of an intensity of use special permit, provided that in no case shall any first-floor residential unit or portion thereof be located on or within 50 feet of the street line of any of the followings streets: Elm Street, Main Street, Moody Street. In the BC District, residential uses shall have separate and distinct entrances from any and all commercial uses, and commercial and residential uses shall not be located on the same floor, except that commercial and residential uses may be allowed on the first floor where development occurs as part of an intensity of use special permit, provided that in no case shall any first-floor residential unit or portion thereof be located on or within 50 feet of the street line of any of the followings streets: Elm Street, Main Street, Moody Street. Multiple residential and/or nonresidential principal buildings may be allowed in the BC District on the same lot when development occurs as part of an intensity of use special permit, provided that all other provisions of Section 4.215 shall be complied with. Further, in instances of new residential construction, excluding rehabilitation or remodeling of existing structures, said residential uses shall be permitted to abut other structures of any type on only one side, and all other sides shall be at least 25 feet from all other structures.



ZONING CODE

Z Attachment 5

City of Waltham

Sec. 4.11. Table of Dimensional Regulations

(See Section 4.12 for footnotes)

[Amended 8-4-1997 by Ord. No. 28403; 3-3-1999 by Ord. No. 28735; 6-26-2000 by Ord. No. 29025; 5-28-2002 by Ord. No. 29513; 12-23-2002 by Ord. No. 29628; 6-13-2005 by Ord. No. 30180; 6-26-2006 by Ord. No. 30450; 6-24-2013 by Ord. No. 31971; 12-10-2018 by Ord. No. 34279; 12-10-2018 by Ord. No. 34282]

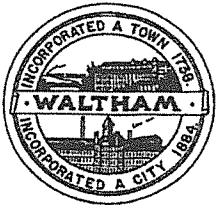
District	Minimum Building Setback(s) (23)(24)(25)			Maximum Building Height (18) (21) (23) (24) (26) (feet)	Maximum Stories (23) (24) (26)	FAR by Right (17)	FAR by Special Permit (17)(22) (23)(24)	Maximum Lot Coverage (percent) (2) (23)(24)	Minimum Open Space (percent) (9), (17)	Lot Area (square feet)	Maximum Dwelling Units per acre (12)	Lot Frontage (feet) (10)	Minimum Lot Area Per Dwelling Unit (square feet)	Minimum Open Space per Dwelling Unit (square feet)	Minimum Lot Width (feet)
	Front (feet)	Side (feet)	Rear (feet)												
RA-1	40	20	40	35	2.5	—	—	20	—	20,000	—	100	—	—	—
RA-2	40	20	40	35(11)	2.5	—	—	20	—	15,000	—	80	—	—	—
RA-3	25	15	30	35(11)	2.5	—	—	25	—	9,600	—	70	—	—	—
Assisted living facilities	40	40	40	35	3	—	—	—	—	40,000	—	100	1,000	500	100
RA-4	25	15	30	35	2.5	—	—	25	—	7,000	—	60	—	—	—
Assisted living facilities	40	40	40	35	3	—	—	—	—	40,000	—	100	1,000	500	100
RB	15	10	30	40	3.0	—	—	30	—	6,000	—	60	—	—	—
Single-family Two-family										6,000	—				
Assisted living facilities	40	40	40	35	3	—	—	—	—	6,000	—	100	1,000	500	100
RC	10	10(3)	20(4)	40	3.0	.20	.60	30	15	—	—	50	—	—	—
Single-family Two-family										6,000	—				
Multifamily										6,000	—				
Assisted living facilities	40	40	40	35	3	—	—	—	—	40,000	6	100	1,000	500	100
RD	75	45	60	50	4.0	.20	.80	30	15	5 acres	6	50	—	—	—
HR1	10	10	20	74	6	1.8	—	75	—	10,000	59	50	—	—	—
Except assisted living															
Assisted living	40	40	40	74	6	1.0	1.5	—	—	40,000	—	100	1,000	500	100
HR2	10	10	20	74	6	1.0	1.25	75	—	10,000	40	50	—	—	—
Except as to multifamily and assisted living															

CITY OF WALTHAM

Sec. 4.11. Table of Dimensional Regulations  
 \* (See Section 4.12 for footnotes)

District	Minimum Building Setback(s) (23)(24)		Maximum Building Height (18) (21) (23) (24) (feet) (26)	Maximum Stories (23) (24)	FAR by Right (17)	FAR by Special Permit (17)(22) (23)(24)	Maximum Lot Coverage (percent) (2) (23)(24)	Minimum Open Space (percent) (9), (17)	Lot Area (square feet)	Maximum Dwelling Units per acre (12)	Lot Frontage (feet) (10)	Minimum Lot Area Per Dwelling Unit (square feet)	Minimum Open Space per Dwelling Unit (square feet)	Minimum Lot Width (feet)
	Front (feet)	Side (feet)												
Multifamily	10	10	74	6	0.01	1.25	75	—	10,000	3	50	1,000	50	100
Assisted living	40	40	74	6	0.5	1.25	—	—	40,000	—	100	—	—	—
HRI	25	15	35(11)	2.5	—	—	25	—	9,600	—	70	—	—	—
Single-family detached	10	0	36	3	.50(16)	1.0	0	—	0	—	50	—	—	—
BA	10	10	36	3	.20	.80	30	1.5	6,000	6	50	—	—	—
Res uses Assisted living facilities	40	40	35	3	—	—	—	—	40,000	—	100	1,000	500	100
BB	0	0	48	4	.50(16)	2.5	0	—	0	—	50	—	—	—
Res uses Assisted living facilities	10	10	40	4	.25	1.0	35	1.5	6,000	10	50	—	—	—
Res uses Assisted living facilities	40	40	35	3	—	—	—	—	40,000	—	100	1,000	500	100
BC	0	0(13)	65	5	1.0	2.5	90	—	—	30	40	—	—	—
LC	150(5)	100(5)	40	3.0	.25	.60	30	25(6)	5 acres	—	400	—	—	—
C	10(7)	15(7)	80	8	.4(16)	2.0	—	—	10,000	—	50	—	—	—
I	10(8)	15(8)	80	8	.4(16)	2.0	—	—	0	—	50	—	—	—
C/R	100	100	20	1	0.05	0.10	5	10	4 acres	0	100	—	—	—
Detached garage	As required by district	3	—(1)	1	—	—	0	—	0	—	50	—	—	—
Accessory building	As required by district	5	—(1)	1	—	—	0	—	0	—	0	—	—	—
Swimming pool (19)	As required by district	10	—	—	—	0	—	0	—	—	0	—	—	—

## **BUILDING SURPLUS**



CITY OF WALTHAM  
MASSACHUSETTS

Brian Bower  
Waltham Building Department  
Acting Chief Inspector of Buildings

February 27, 2024

The Honorable Jeannette A. McCarthy  
Waltham City Hall  
610 Main Street  
Waltham, MA 02451

Dear Mayor McCarthy,

The building known as Tarbell Hall serves no useful purpose at this time for the Building Inspector.

Respectfully,

Brian J. Bower  
Acting Chief Building Inspector

BJB/cfb