



COMMUNITY PRESERVATION COMMITTEE AGENDA

May 9, 2023 at 7:00 P.M.

Ruthanne Fuller
Mayor

Barney S. Heath
Director of Planning and
Development

COMMUNITY PRESERVATION COMMITTEE

Jennifer Molinsky, Chair
Eliza Datta, Vice Chair
Mark Armstrong
Dan Brody
Byron Dunker
Susan Lunin
Robert Maloney
Martin Smargiassi
Judy Weber

www.newtonma.gov/cpa

Program Staff

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Newton, MA 02459
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The Community Preservation Committee (CPC) will hold this meeting as a virtual meeting. No in-person meeting will take place at City Hall.

To view and participate in this virtual meeting on your phone, download the "Zoom Cloud Meetings" app in any app store or at www.zoom.us. At the above date and time, click on "Join a Meeting" and enter the following Meeting ID: **85320099500**

To join this meeting on your computer, go to:
<https://us02web.zoom.us/j/85320099500>

One tap mobile: +16465588656,,85320099500#

At the start of the meeting, CPC members will designate a member to be responsible for reviewing the draft minutes for this meeting.

PROPOSALS AND PROJECTS

7:00 P.M. - Public Hearing on the [Warren House Preservation and Rehabilitation Project](#) (\$2,100,000 in Historic Resource Funding)

OTHER BUSINESS

- 1) Review of Existing and Potential Future Projects
- 2) Review of Current Finances
- 3) Approval of February 14 and March 7 Minutes
- 4) Other

Please note that the times noted above are approximate and discussions may happen earlier or later in the meeting as needed. Pre meeting packets with additional information on each agenda item are posted on the website before each meeting.

The location of this meeting/event is wheelchair accessible and Reasonable Accommodations will be provided to persons with disabilities who require assistance. If you need a Reasonable Accommodation, please contact the city of Newton's ADA/Section 504 Coordinator, Jini Fairley, at least two business days in advance (2 weeks for ASL or CART) of the meeting/event: jfairley@newtonma.gov or (617) 796-1253. The city's TTY/TDD direct line is: 617-796-1089. For the Telecommunications Relay Service (TRS), please dial 711.



Meeting Materials for May 9, 2023

Proposals and Project Reviews

Warren House Preservation and Rehabilitation Project Public Hearing

The pre-proposal for this project was before the Committee in March and was invited to submit a full proposal at that time. A copy of the Reader's Guide analysis and full proposal are attached.

OTHER BUSINESS

- 1) Review of Existing and Potential Future Projects – Although we have a lot of projects that are nearing the finish line, we have not had any significant changes in status since the last meeting. I have left both the sheets from the last meeting in the packet for your information.
- 2) Review of Current Finances – Attached is the most recently updated version of the Finances at a Glance document. This includes the amount of funding recommended for the Athletic Fields but both the bonded funds for Gath Pool and the Athletic Fields are not directly shown yet as if approved, neither would impact the program's funds until FY25.
- 3) Approval of February 14 and March 14 Minutes – The draft minutes were sent out prior to the last meeting. I have also attached them here for further review.
- 4) Other - Just in case.



NEWTON
COMMUNITY DEVELOPMENT
FOUNDATION

April 21, 2023

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Members of the Newton Community Preservation Committee
Jennifer Molinsky, Chair
c/o Lara Kritzer, Community Preservation Program Manager
City of Newton Planning & Development Department
1000 Commonwealth Avenue
Newton, MA 02459

Dear Members of the Community Preservation Committee:

We appreciated the opportunity to meet with you on March 14, 2023 to discuss NCDF's Pre-Proposal for CPA funds to continue Preservation and Rehabilitation work at Warren House. We're pleased that you recommended the project for further consideration, and your feedback was helpful as we prepared this Full Proposal.

NCDF is seeking a grant in the amount of \$2,100,000 to be used to cover a portion of the costs associated with removing and replacing all 248 windows (199 of which are original schoolhouse-style windows and 49 smaller windows installed during the 1992 renovation), masonry repairs, and preservation of the ornamental cast stone copings at the former Levi F. Warren Junior High School. The school was designed by Addison LeBoutillier, a versatile architect of the turn of the century and reflects the classic traditions of the architect's Beaux Arts influence. Construction was completed in 1927.

Following the closing of the school in the early 1980's, the building remained vacant for almost 10 years until the City asked NCDF to purchase and develop the property. NCDF shared the City's vision for the adaptive reuse of the building, and in 1991, Warren House Associates Limited Partnership (WHALP), a single-purpose entity, was created to develop and own Warren House. WHALP purchased the building and entered into a ground lease with the City. NCDF contracted with Notter Finegold & Alexander to create the design for the renovation of Warren House, and in 1992, the historic school was beautifully transformed into 59 apartments.

The 1992 rehabilitation strictly adhered to the Secretary of the Interior's Standards for Historic Preservation and subsequent renovations including roof replacement, masonry repairs and restoration of cast stone copings have been reviewed and approved by the Newton and Massachusetts Historical Commissions. In recognition of its architectural significance, Warren House was honored with a listing on the National Register of Historic Places in 1990 and received the Massachusetts Historical Commission's Preservation Award in 1994. A Historic Preservation Restriction was placed on the building in 2010 to assure the continued architectural and historical integrity of the exterior key features of the building. CPA funding will assist in the continued preservation of this nationally significant historic structure.



425 Watertown Street, Suite 205, Newton MA 02458

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Newton Community Development Foundation (NCDF) was organized in 1968 to foster economic and cultural diversity in the City of Newton through the development and management of affordable and mixed-income housing communities for low- and moderate-income individuals, families, senior citizens, and persons with disabilities. NCDF was founded through the combined efforts of 24 priests, ministers and rabbis from the Newton Clergy Association and members of Church Women United, pursuing ways in which Newton could provide reasonably priced housing for low and moderate-income families to meet the needs of the community. Later that year, leadership of the Foundation was transferred from the clergy to a lay board of distinguished Newton citizens. NCDF has since developed 241 units of housing in six properties throughout the City of Newton providing homes to hundreds, including low-income seniors, families, survivors of domestic violence and individuals with disabilities.

Our comprehensive Resident Services program addresses the various and changing needs of our residents through a range of supportive services and activities that promote self-worth and dignity, enrich lives, affirm diversity, encourage community spirit, and sustain independent living. Supportive services must be a key integrated element to help low-income families and individuals achieve housing stability to sustain successful tenancies and to enhance quality of life for all residents.

We attribute our longevity and success to our unique niche and ongoing commitment to developing, preserving, providing, refinancing, and extending affordability of housing in the City of Newton. NCDF believes that affordable housing is a community concern, and we continually seek, and advocate for opportunities to develop additional affordable and mixed-income housing, as well as ways to partner with other organizations that have similar goals and objectives.

Development and Management of NCDF Properties

In 1977, The Hamlet, a family-oriented, townhouse-style development of 50 units at low, moderate, and market-rate rents, was ready for occupancy – the first privately held mixed-income housing approved by the City of Newton, with financing by MassHousing. The community was later renamed Houghton Village in tribute to Eloise K. Houghton, founding member and past president of NCDF.

Financed in 1980 through HUD's Section 202 Direct Loan Program, and constructed in the heart of Newton Centre in 1981, Casselman House opened with 42 apartments for low-income seniors and persons with disabilities and one unit for a live-in staff member.

Assisted by MassHousing and the Certified Historic Rehabilitation Tax Credit Program, NCDF converted the former John W. Weeks Junior High School (built in 1931) into mixed-income apartments in 1983, retaining important historic features of the original Tudor Revival style building. The project was financed by MassHousing in combination with limited partner's equity through the use of the certified Historic Rehabilitation Tax Credit. The John W. Weeks House opened in 1984 with sixty-seven mixed-income apartments (34 project-based Section 8 and 33 market rate) for seniors and persons with disabilities, as well as eight (project-based Section 8)

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three-bedroom apartments for low-income families. A 2016 refinancing with MassHousing enabled extensive renovations to this historic building, including new windows.

The former Levi F. Warren Junior High School was converted in 1992 by NCDF and Keen Development into 59 mixed-income apartments. Warren House was financed through MassHousing in combination with limited partner's equity through the use of Low-Income Housing Tax Credits and funded by the City of Newton's Community Development Block Grant (CDBG) program and DHCD's Community Development Action Grant (CDAG).

Renovated in 1996 into a four-unit home, financed by The Village Bank, Brookline Bank, and a Facilities Consolidation Fund loan from the Community Economic Development Assistance Corporation (CEDAC), Boylston Street in Newton Highlands became an NCDF residence for adults with behavioral and social challenges living independently while receiving supportive services and education/employment opportunities from Elliot House. Done in partnership with Riverside Community Care, the project represents effective collaboration with other nonprofit organizations to make much needed housing available to special groups for whom affordable housing was particularly scarce. The Newton Housing Authority provides Section 8 rental subsidies for the residents of Boylston Street.

The Homes at Auburndale Yard were developed in 1998 under the Comprehensive Permit statute (Chapter 40B) on a small parcel of land purchased at a nominal cost from the City of Newton, which granted HOME funds to develop the property. The Village Bank provided construction financing. This mixed-income community consists of six single-family homes and two duplexes. NCDF sold three of the homes to income-eligible first-time homebuyers and four at market-rate prices, retaining three to rent to low-income families with Section 8 rental vouchers provided by the Newton Housing Authority, which also contributed development funds.

Renovation, Rehabilitation and Preservation

Over the past 20 years, NCDF has been addressing preservation, renovation, upgrade, and accessibility requirements at all its properties, while also working to preserve affordability. NCDF has contracted with Gale Associates for the majority of the major renovation projects relying on their expertise for evaluation, design, bid phase and construction phase services. Every project with Gale has been completed within budget and on time.

In 2009 NCDF received Community Preservation Act (CPA) and Inclusionary Zoning funds from the City of Newton for the historic preservation and rehabilitation of the Warren House roof and façade, completed in 2010. The Newton Historical Commission's support for Phase I of this project, a prerequisite for applying for state financing funding, later allowed NCDF to receive \$300,000 in rehabilitation tax credit equity funds from the Massachusetts Historical Commission. In accordance with Section 42 of the Internal Revenue Code, a percentage of units are maintained as affordable for income-eligible households. NCDF completed Phase II of the Warren House preservation and rehabilitation project in 2015 with funding from MassHousing.

NCDF is unique in the fact that it continues its commitment to affordable housing instead of converting to market rate when regulations permit. In 2011, NCDF extended its federal Housing

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Assistance Payment (HAP) contract for the longest term possible, with rental subsidies provided through HUD's Project-Based Section 8 program for Casselman House, and in 2015 did the same for Weeks House. In 2017, NCDF refinanced Houghton Village through MassHousing, enabling major renovations while extending affordability by resolving the expiring Section 13A rental subsidies. Twenty of these units are subsidized by the Department of Housing and Community Development's Massachusetts Rental Voucher Program, and ten units converted to Workforce Housing—affordable for working families whose incomes are too high for subsidized housing but are priced out of market rents.

MassHousing provided a 35-year permanent loan of \$8.1 million to preserve and extend affordability at Casselman House, and from 2017 – 2020, a series of major renovations and upgrades to Casselman were done: elevator upgrades; modernization of all common areas; improved security system; new LED lighting, roof, and HVAC system.

MassHousing also provided financing for the renovation of the historic Weeks House (2018-19), allowing NCDF to undertake extensive exterior repairs: replacing the roof, repairing masonry, installing new exterior doors to the eight family units, and removal and replacement of large, multi-paned, double-hung windows in each apartment.

Development Consulting and Management Services for Other Organizations

Known for our management expertise, NCDF provides property management services for other nonprofits and condominium communities in Newton and neighboring communities. We provide management consulting services for the 28 Single Room Occupancy (SRO) units at the West Suburban YMCA's Newton Corner Place, housing formerly homeless men.

NCDF served as consultants to Myrtle Village LLC to develop seven (7) affordable units at Myrtle Village. This project received support from the Community Preservation Program, CDBG and HOME federal funding through the City of Newton. NCDF is responsible for ongoing management of the property.

NCDF also manages 20 affordable family housing units at High Rock Homes for the Needham Housing Authority.

Awards & Recognition

Casselmann, Warren and Weeks Houses consistently won CEL & Associates awards, a national standard for service excellence, based on independent resident satisfaction surveys. In addition, Weeks House has been recognized by NEAHMA as a Community of Quality, and Warren House received the Massachusetts Historical Commission's Preservation Award. The Homes at Auburndale Yard won statewide recognition for the support and cooperation engendered among the City, neighborhood, Mayor's Task Force and NCDF, resulting in Newton's first example of mixed-income sales and rental units. In 1999, the Citizens Housing and Planning Association (CHAPA) and greater Boston real estate board honored the City of Newton and NCDF with its Community Housing Leadership Award, acknowledging outstanding leadership, commitment, and perseverance in the development of affordable housing for low and moderate-income residents. NCDF consistently receives recognition from MassHousing as a

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property management company that makes a concerted effort to do business with Minority and Women-Owned Business Enterprises. Ongoing professional development training and certification ensures that our staff is current with affordable housing issues and requirements.

Warren House Today

NCDF remains committed to preserving the façade of this landmark historic structure as well as the affordability of more than thirty-five percent (35%) of the apartments. Six (6) of the 21 units affordable to households earning 50% or below of the Area Median Income (AMI) are set to expire at year end, and NCDF intends to extend the affordability of those six (6) units and is offering to restrict an additional four (4) units to be affordable to households earning 80% of AMI with a commitment of CPA funding. This will result in 25 (42%) of the 59 units at Warren House being affordable.

NCDF contracted with Gale Associates in 2019 to conduct a limited visual evaluation of the existing exterior walls, doors, and windows at Warren House. A copy of Gale's report dated June 7, 2019 is attached and includes a summary of their recommendations, photographic documentation and preliminary cost estimates totaling \$2,739,300. At that time NCDF had been in discussions with MassHousing about a potential refinancing to address this scope of work and with the City of Newton about extending the Ground Lease which expires in 2056.

Negotiations have continued over the past few years, and we hope to refinance with MassHousing or another comparable lender by year end. Unfortunately, given the significant increase in labor and material costs over the past 3 years, the budget increased dramatically as have interest rates! Gale provided the attached revised budget estimates dated December 9, 2022, reflecting an estimated total of \$4,186,600. While refinancing the first mortgage is expected to enable NCDF to pay off existing mortgage debt and continue providing 59 units of mixed income housing, it will not provide enough capital to address the continued preservation of the façade of this beautiful historic structure while ensuring adequate operations. Therefore, NCDF is requesting that the Community Preservation Committee consider funding a portion of the project to preserve the buildings physical integrity which will also enable the preservation and creation of additional affordable units.

We are extremely grateful for the 30+ year partnership between the City and NCDF to maintain Warren House as a valuable resource for the City's residents and we look forward to discussing the project further with members of the CPC during your May 9, 2023 meeting. Please let me know if there is anything further needed in advance of that meeting.

Sincerely,



Jeanne Strickland
Executive Director

Attachments



NEWTON COMMUNITY PRESERVATION PROGRAM FUNDING REQUEST (Proposal)

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City of Newton



Ruthanne Fuller
Mayor

Newton, Massachusetts Community Preservation Program FUNDING REQUEST

PRE-PROPOSAL

PROPOSAL

Last updated February 2020.

Please submit this completed file directly – do not convert to PDF or other formats.

For full instructions, see www.newtonma.gov/cpa or contact:

Lara Kritzer, Community Preservation Program Manager

City of Newton Planning & Development Department, 1000 Commonwealth Ave., Newton, MA 02459

lkritzer@newtonma.gov 617.796.1144

(For staff use)
date rec'd:

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.

Project TITLE	Warren House Preservation and Rehabilitation		
Project LOCATION	Full street address (with zip code), or other precise location. Warren House, 1600 Washington Street, West Newton, MA 02465		
Project CONTACTS	Name & title or organization	Email	Phone
Project Manager	Jeanne Strickland, Ex. Dir. Newton Community Development Foundation	jstrickland@ncdfinc.org	617-244-4035 x224 425 Watertown Street, Ste 205, Newton, MA 02458
Other Contacts			
Project FUNDING	A. CPA funds requested: \$2,100,000	B. Other funds to be used: \$9,495,598	C. Total project cost (A+B): \$11,595,598
Project SUMMARY	<p>Explain how the project will use the requested CPA funds. You may provide more detail in attachments, but your PROJECT SUMMARY MUST FIT IN THE SPACE BELOW. Use a cover letter for general information about the sponsoring organization's accomplishments.</p> <p>NCDF is seeking \$2,100,000 in CPA Historic Preservation Funds to replace windows, perform masonry repairs and preserve ornamental cast stone copings at the historic former Levi F. Warren Junior High School. The building was beautifully transformed by NCDF in 1992 into 59 mixed income apartments, 21 of which are affordable to households earning up to 50% of the Area Median Income. The building's stately, wood, schoolhouse-style windows (199 in total) are original with the frames being removed during the 1992 renovation, dipped for de-leading and double pane glass panels were installed. An additional 49 smaller windows were replaced/added during the 1992 renovation and have exceeded their 30-year useful life and are in fair/poor condition. NCDF contracted with Gale Associates in 2005 to conduct an initial evaluation of the building to identify areas of water infiltration. Gale recommended a phasing plan to renovate the existing building components, and because Warren House is listed on the National Register of Historic Places, the renovations that Gale suggested were in accordance with the National Park Services and incorporated similar, or like-kind building fabric to maintain the existing building conditions. Multiple different phases were presented to renovate the building, which included the removal and replacement of the slate shingles, restoration of the main cupola, and railing system, emergency sounding and removal of damaged cast stone elements, replacement of select cast stone elements, replacement of balcony waterproofing, removal and replacement of deteriorated brick masonry, the removal, excavation and replacement of the former main entrance stairway to address heaving and sub-surface waterproofing, and repair/stabilization of select wood window units. Phase 1 work was performed in 2009 – 2010 and Phase 2 work was performed in 2015. As we prepare to embark on the final phase of building envelope preservation and rehabilitation, CPA funds will be used to cover a portion of the costs associated with removing all 248 windows and replacing them with new aluminum, energy efficient windows that will match the same profile as the existing wood windows. An aluminum panning system will basically "cover" the existing window frame and will match the aesthetic similarities of the current window perimeter. As part of the design, holes will be cored in the existing window sash pockets to fill voids with either spray foam or batt insulation. Gaps between the window frames and the new window system will be filled with insulation as well. Existing oriented strand board stools and aprons will be removed at window interiors and sealants will be applied to the interior and exterior window perimeters to create a weather tight condition. Extensive masonry repairs and restoration will be performed around window perimeters including the removal and replacement of cracked and spalled brick masonry units; repair/patch spalled cast stone locations; rout and seal crack locations within the precast stone elements and repoint deteriorated brick masonry mortar joints. The new windows will provide thermal efficiencies to meet code requirements for historic structures while also reducing the overall maintenance of the building.</p>		

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.

Project TITLE		Warren House Preservation and Rehabilitation	
USE of CPA FUNDS		HISTORIC RESOURCES	
CHECK ALL THAT APPLY	Preserve	✓	
	Rehabilitate/Restore	✓	
COMMUNITY NEEDS	<p>From each of at least 2 plans linked to the Guidelines & Forms page of www.newtonma.gov/cpa, provide a brief quote with plan title, year, and page number, showing how this project meets previously recognized community needs. You may also list other community benefits not mentioned in any plan.</p> <p>Following the closing of Warren Junior High School in the early 1980's, the building remained vacant for almost 10 years until the City asked NCDF to purchase and develop the property. NCDF shared the City's vision for the adaptive reuse and transformed the building in 1992 into 59 units of mixed income housing. The window replacement, masonry repair and cast stone coping restoration project will adhere to the standards noted in the Newton Historic Preservation Design Guidelines. The wood windows that once served as a light source in classrooms were restored in 1992 and will now be replaced with aluminum, thermally efficient, code compliant windows for historic structures while also reducing the overall maintenance of the building. This project will result in reduced energy demand and lessen energy costs for residents, many of whom are very low income and all of whom pay for their own heating /air conditioning. This project is in concert with Newton's Comprehensive Plan as noted in the Housing Section, specifically Strategic Approaches on page 5-15, (Acting in Concert with the City' Other Goals and with Convergent Efforts of Others); Sustainable design can lessen negative environmental impacts of new development, reduce energy demand, and keep ongoing operating and maintenance costs down, thus serving interests in housing affordability as well as natural resource protection. Also on page 5-15, (Utilizing Existing Housing); We need to encourage and assist the maintenance, upgrading, and restoration of existing housing units, and to address such issues as...and energy efficiency. This project will result in reduced energy demand and will lessen energy costs for residents, many of whom are very low income and all of whom pay for their own heating/air conditioning. For more than 50 years, NCDF has been fostering diversity in the City of Newton through the development and management of affordable and mixed income housing communities. Our mission and accomplishments are aligned with the Housing Section of the Newton Comprehensive Plan, specifically Housing Goals on page 5-12 (Protecting the City's Diversity), Supporting Newton's cherished diversity is a fundamental goal. To accomplish that, we need to undertake a program of positive actions that will assure fair and equal housing opportunities for a population that is at least as diverse as at present in age, race, household type, life-style, cultural heritage and economic status. That diversity should not only be welcomed but should also be actively sought. For that seeking to be effective, that diverse population must be able to find and maintain suitable housing at affordable costs. Warren House serves a diverse population with 24 (41%) of the current 59 households having incomes at or below 50% AMI (21 residing in affordable units and three (3) residing in market rent units using Housing Choice vouchers). The market rent units (38 total) provide a vital niche in Newton serving households not willing or able to pay rent levels at the market rate units recently constructed or coming online in Newton. A total of 13 households residing in a combination of market rent and affordable units identify as Black (22%), 10 households identify as Asian (17%) and four (4) households identify as Hispanic (7%). Warren House continues to meet several of the Housing Goals and Strategic Approaches (Pages 5-12 through 5-17) noted in the Housing Section of the Newton Comprehensive Plan including on page 5-12 (Broadly Defining Diversity; Housing affordability in Newton is a problem, not only for low-income residents, but also for many others as well, including those of moderate and middle income, and housing efforts must recognize that. Warren House is a focal point of the community with the fields and tennis (pickleball) courts surrounding the property used extensively for personal and City sponsored activities, which successfully integrated Warren House and our residents into the community. NCDF is responsible for the upkeep and maintenance of the 103 recreational parking spaces serving the City's recreation fields (Richard J. McGrath Park), tennis (pickleball) courts and dog park.</p>		
COMMUNITY CONTACTS	<p>List at least 3 Newton residents or organizations willing and able to comment on the project and its manager's qualifications. No more than 1 should be a supervisor, employee or current work colleague of the project manager or sponsor. Consult staff on the community contacts required for your specific proposal.</p>		
Name & title or organization		Email	Phone
Joan McGrath Warren House neighbor		Joan1617@comcast.net	617-965-0555 1617 Washington Street West Newton, MA 02465
Dr. Mark Poster Resident of Warren House		mfpmd@comcast.net	617-510-6593 1600 Washington Street, Apt. 121, West Newton, MA 02465
Tamika Officer Resident of Warren House		officertamika@yahoo.com	781-726-3147 1600 Washington Street, Apt. 112, West Newton, MA 02465
David Koven NCDF Board member		David@kovenconsulting.com	617-429-1619 33 Harrison Street Newton, MA 02461
Susan Lynch MassHousing		SLynch@masshousing.com	617-854-1150 One Beacon Street Boston, MA 02108

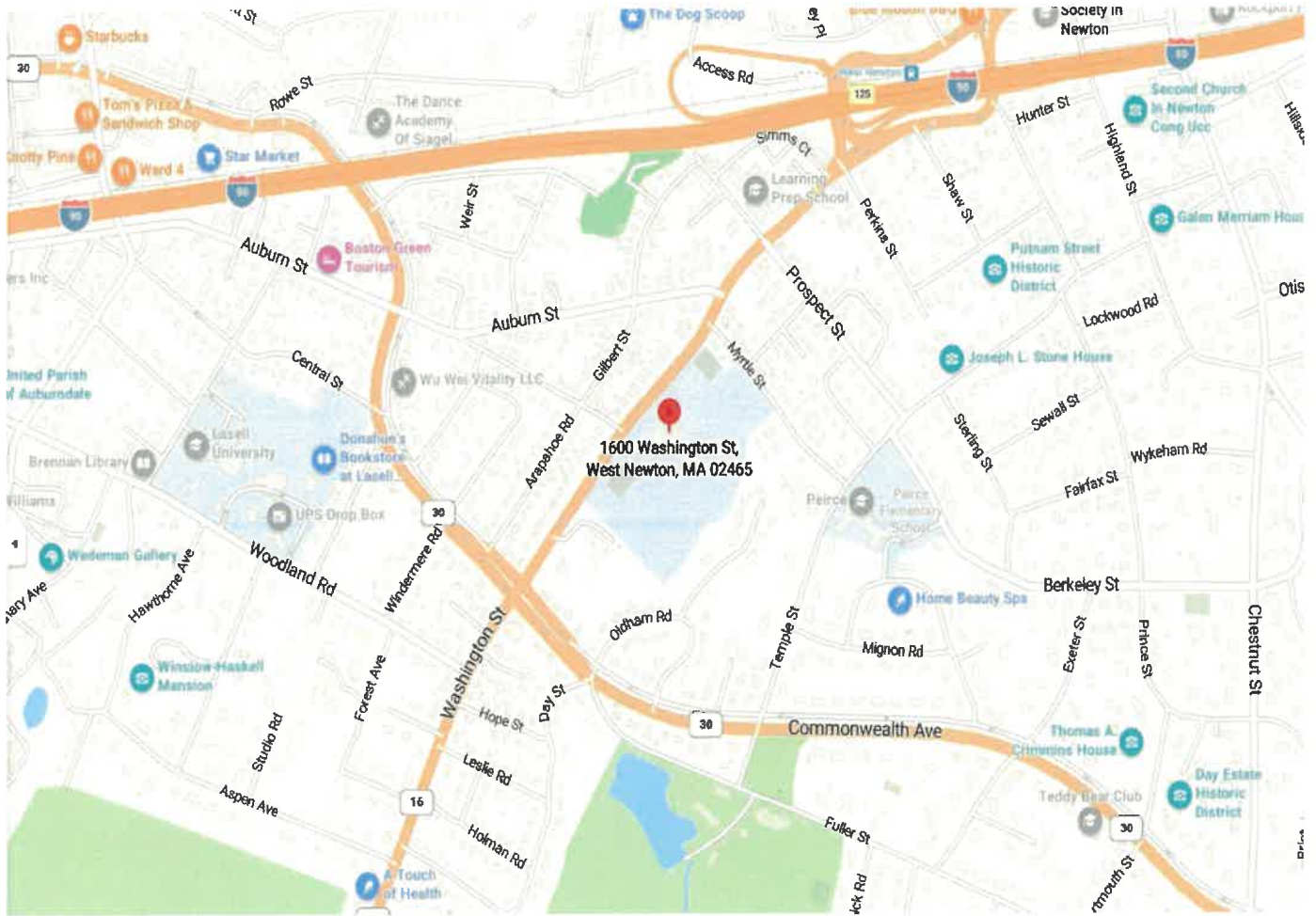
You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.
Full proposals must include separate, detailed budgets in addition to this page.

Project TITLE	Warren House Preservation and Rehabilitation	
SUMMARY CAPITAL/DEVELOPMENT BUDGET		
Uses of Funds		
Exterior Renovations (window replacement and masonry repairs, including 10% contingency)		\$4,605,260
Other near term interior& exterior upgrades noted CNA for years 1 – 5 (including 10% contingency)		\$871,2000
Transaction Costs (architecture, engineering, clerk loan fees, legal, title, clerk, etc.),)		\$707,191
Operating Reserves		\$273,200
Existing Debt Repayment & Ground Lease Payment		\$5,138,747
D. TOTAL USES (should equal C. on page 1 and E. below)		\$11,595,598
Sources of Funds	Status (requested, expected, confirmed)	
CPA funding	Requested	\$2,100,000
Newton AHT (\$1,900,000) and Newton HOME (\$129,000)	Requested	\$2,029,000
New First Mortgage	Requested	\$6,830,000
Warren House Associates Limited Partnership	Confirmed	\$636,598
E. TOTAL SOURCES (should equal C. on page 1 and D. above)		\$11,595,598
SUMMARY ANNUAL OPERATIONS & MAINTENANCE BUDGET (cannot use CPA funds)		
Uses of Funds		
Administration		\$297,929
Maintenance		\$281,291
Utilities		\$120,121
Taxes, Insurance, Reserves		\$279,652
F. TOTAL ANNUAL COST (should equal G. below)		\$978,993
Sources of Funds		
Rental Income		\$978,993
		\${amount}
G. TOTAL ANNUAL FUNDING (should equal F. above)		\$978,993
Project TIMELINE	Phase or Task	Season & Year
	Window Replacement (4 - 6 months)	Spring/Summer 2024
	Masonry Repairs and Restoration of Cast Stone Copings (4 – 6 months)	Spring/Summer 2024
	Unit upgrades	2024 - 2025
	Site upgrades	2024
	HVAC system upgrades	2024
	Other misc. projects noted in CNA (compactor, emergency generator, etc.)	2024 - 2026

Project TITLE		Warren House Preservation and Rehabilitation	
↓ Check off submitted attachments here.			
REQUIRED	X	PHOTOS	of existing site or resource conditions (2-3 photos may be enough)
	X	MAP	of site in relation to nearest major roads (omit if project has no site)
Pre-proposals: separate attachments not required, just use page 3 of form. Full proposals: separate, detailed budget attachments REQUIRED.	PROJECT FINANCES printed and as computer spreadsheets, with both uses & sources of funds		
	X	Development pro forma/capital budget: include total cost, hard vs. soft costs and contingencies, and project management – amount and cost of time from contractors or staff (in-kind contributions by existing staff must also be costed)	
	X	Maintenance budget, projected separately for each of the next 10 years (CPA funds may not be used for operations or maintenance)	
	X	Non-CPA funding: commitment letters, letters of inquiry to other funders, fundraising plans, etc., including both cash and est. dollar value of in-kind contributions	
	X	Purchasing of goods & services: briefly summarize sponsor’s understanding of applicable state statutes and City policies	
Pre-proposals: recommended. Full proposals: REQUIRED.	X	HISTORIC SIGNIFICANCE	ATTACHMENT 1: Analysis of Historical Significance (narrative; maximum 1 page)
			ATTACHMENT 2: Description of Historically Significant Features (maximum 1 page)
			ATTACHMENT 3. Summary & Justification of Proposed Treatment (maximum 1 page)
			ATTACHMENT 4. Newton Historical Commission Review (based on attachments 1-3 above)
REQUIRED for all full proposals.	SPONSOR FINANCES & QUALIFICATIONS, INSTITUTIONAL SUPPORT		
	X	For sponsoring organization, most recent annual operating budget (revenue & expenses) & financial statement (assets & liabilities); each must include both public (City) and private resources (“friends” organizations, fundraising, etc.)	
	X	For project manager: relevant training & track record of managing similar projects	
REQUIRED for all full proposals involving real estate acquisition, construction or other building/ landscape improvements.	DESIGN & CONSTRUCTION		
		Professional design & cost estimates: include site plan, floor plans & elevations	
		Materials & finishes: highlight “green” or sustainable features & materials	
		Environmental mitigation plans (if applicable): incl. lead paint, asbestos, etc. (including disposal of existing fence elements that cannot be repaired or restored)	
OPTIONAL for all proposals.	X	LETTERS of SUPPORT	from Newton residents, organizations, or businesses

ATTACHMENT 1 –
MAPS

Warren House – City wide map



Warren House – Close Up map from the Assessor’s Database

Map Geo link:

<https://newtonma.mapgeo.io/datasets/properties?abuttersDistance=100&latlng=42.342338%2C-71.234736&panel=search&previewId=32024%200006&zoom=18>

1600 WASHINGTON ST

Google Maps Link
City of Newton
City of Newton Assessing Dept.
Frequently Asked Questions
Sketch Codes and Definitions
City of Newton HERS Ratings List (from Newton Energy Commission)

Property

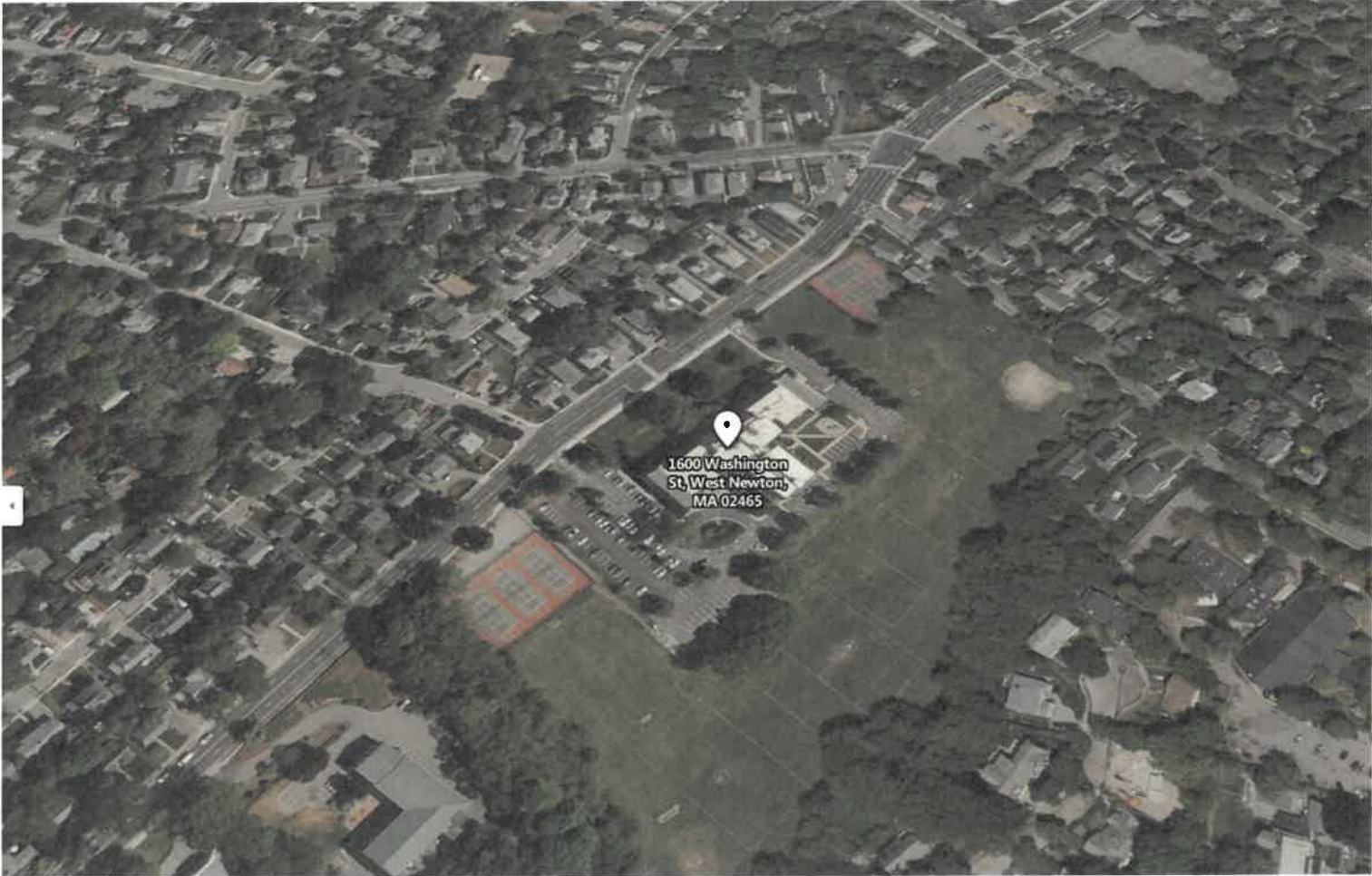
Property SBL	32024 0006
Address	1600 WASHINGTON ST
Tax Bill Number	2054848
Land use	125C
Land use Description	OTHR LIV F MDL-94
Lot Size	162,479 sq ft
Zoning	MR3
Map ID	053NE
ID	32024 0006

Property image

Warren House – Bird's eye view



Warren House – Bird’s -eye view showing neighborhood



ATTACHMENT 2 –
DEVELOPMENT PRO FORMA / CAPITAL BUDGET
(One Stop Format)

Section 1 PROJECT DESCRIPTION

Name and Address of Project			
1 . Project Name:	Warren House		
1a . Application Completed By:	David Levy		
1b . Original Application Date:	2/15/23	Application Revision Date:	4/17/23
2 . Project Address:	1600 Washington Street		
3 . Neighborhood	West Newton		
4 . City/ Town	Newton	MA	02465
	<small>(state)</small>	<small>(zip code)</small>	
5 . County	MIDDLESEX		
6 . <input type="checkbox"/> Scattered sites			
7 . Is this a qualified census tract?	Yes	Select A QCT	0104.03
8 . Difficult to develop area	Not Applicable	QCT information last updated on:	9/19/2016

Development Plan

9 . Development Type (Please check all that apply.)

No	New construction
No	Acquisition, substantial rehab of existing housing
Yes	Acquisition, moderate rehab of existing housing
No	Acquisition, minimal or no rehab of existing housing
No	Adaptive re-use of non-residential structure

10 . Proposed Housing Type Rental (except SRO or Assisted Living, see below)

11 . **Project Description:** Number of buildings: 1

Warren House is an existing 59-unit apartment building that formerly housed the Newton Public Junior High School. The building was converted to housing and a childcare center in 1992 utilizing equity generated from the sale of Low Income Housing Tax Credits. Of the building's current 59 apartments, 21 are affordable to households earning no more than 50 percent of the areawide median income. The property is encumbered by a 65-year ground lease from the City of Newton that requires the building's owner/operator, Newton

12 . **Development Schedule:**

	Original	Revised	Optional user comments
Application Date	2/15/23		Construction schedule is a rough estimate and will be finalized once construction documents are released to a general contractor.
Construction Loan Closing	12/20/23		
Initial Loan Closing (MHFA only)	12/20/23		
Construction Start	3/1/24		
50% Construction Completion	6/1/24		
Construction Completion	12/1/24		
First Certificate of Occupancy	N/A		
Final Certificate of Occupancy	N/A		
Sustained Occupancy	N/A		
Permanent Loan Closing	N/A		

Warren House

Application Date: 2/15/23

Revised Date: 4/17/23

13 . Unit Mix:	50% AMI				Market Rate	Total Units
	Low-Income Mobile Voucher	Low-Income below 50%	Low-Income below 60%	Low-Income 80%		
SRO						0
0 bedroom						0
1 bedroom	2	2		1	10	15
2 bedrooms	7	7		3	21	38
3 bedrooms	2	1			3	6
4 bedrooms						0
Total Units	11	10	0	4	34	59
Home Units*						0

*HOME units included in the above totals. Other Income=Below 80% of median income

14 . Unit Size in square feet:

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income 80%	Market Rate	Average All Incomes
SRO						N/A
0 bedroom						N/A
1 bedroom	600.0	600.0		600.0	600.0	600
2 bedrooms	800.0	800.0		800.0	800.0	800
3 bedrooms	1000.0	1000.0			1000.0	1,000
4 bedrooms						N/A

15 . Number of bathrooms in each unit:

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income 80%	Market Rate	Average All Incomes
SRO						N/A
0 bedroom						N/A
1 bedroom	1.0	1.0		1.0	1.0	1.0
2 bedrooms	2.0	2.0		2.0	2.0	2.0
3 bedrooms	2.0	2.0			2.0	2.0
4 bedrooms						N/A

16 . Funding Applied For:

Please check all the funding that is being applied for at this time, with this application:

DHCD Tax Credit Allocation No

Category

Category

HOME Funding through DHCD No

Massachusetts Housing Finance Agency (select all that apply):

Official Action Status No

Construction Financing/Bridge Financing..... No

Permanent Financing No

Massachusetts Housing Partnership (MHP) Fund:

Permanent Rental Financing Program No

Massachusetts Housing Investment Corporation (select all that apply):

Debt Financing No

Tax Credit Equity Investment No

Boston Department of Neighborhood Development (DND): No

Other No

Other..... N/A

Other..... N/A

Other..... N/A

Financing from MassDevelopment No

	Total	New Construction	Rehabilitation
17. Number of buildings planned:			
a. Single-Family	0		
b. 2-4 Family	0		
c. Townhouse	0		
d. Low/Mid rise	1		1
e. High-rise	0		
f. Other	0		
TOTAL	1	0	1
18. Number of units:	59		59
19. Gross Square Footage			
a. Residential	60,000		60,000
b. Commercial	-	-	-
20. Net Rentable Square Footage:			
a. Residential	45,400	s.f.	76%
b. Commercial	-	s.f.	N/A
21. Number of handicapped accessible units	3	Percent of total	5%
22. Fire Code Type	Protected steel		
23. Will building(s) include elevators?	Yes	How many?	1
24. Are the following provided with the housing units:		Gas or electric:	electric
a. Range?	Yes	Optional user comments <div style="border: 1px solid black; height: 150px; width: 100%;"></div>	
b. Refrigerator?	Yes		
c. Microwave?	Yes		
d. Dishwasher?	Yes		
e. Disposal?	Yes		
f. Washer/Dryer Hookup?	No		
g. Washer & Dryer?	No		
h. Wall-to-wall Carpet?	Yes		
i. Window Air Conditioner? ...	No		
j. Central Air Conditioning? ...	Yes		
25. Are the following included in the rent:			
a. Heat?	No		
b. Domestic Electricity?	No		
c. Cooking Fuel?	No		
d. Hot Water?	Yes		
e. Central A/C, if any?	No		
26. Type of heating fuel:	Gas		
27. Total no. of parking spaces:	192	Outdoor: 192	Enclosed: 0
28. Number of parking spaces exclusively for the use of tenants:			
a. Residential	Total: 0	Outdoor: 0	Enclosed: 0
b. Commercial	Total: 0	Outdoor: 0	Enclosed: 0

29 . Will rehabilitation require the relocation of existing tenants?

30 . Scope of rehabilitation: Please describe the following (or type N/A).

a. Major systems to be replaced:

b. Substandard conditions and structural deficiencies to be repaired:

c. Special features/adaptations for special needs clients to be housed:

31 . Are energy conservation materials in excess of the Building Code?

a. Insulation

b. Windows

c. Heating system R-Value or type?

Information On Site And Existing Buildings

	Square Feet	Acres
32 . Size of Site:	0	
33 . Wetlands area:	0	
34 . Buildable area:	0	

Existing Conditions:

35 . What is the present use of the property?

36 . Number of existing structures:

37 . Gross s.f. of existing structures:

38 . If rehabilitation:

	number of units	num. of bedrooms
a. Number of existing residential units/bedrooms:		
b. Number of units/bedrooms currently occupied:		

39 . If site includes commercial space:

a. Square footage of existing commercial space:	<input type="text"/>	square feet
b. Square footage currently occupied:	<input type="text"/>	square feet

40 . What are the surrounding land uses?

Utilities:

41 . Are the following utilities available on the site:

a. Sanitary sewer?	Yes
b. Storm sewer?	Yes
c. Public water?	Yes
d. Electricity?	Yes
e. Gas?	Yes

If any of the above are not available, is plan attached explaining how such service will be extended to the site?

Zoning:

Please include information on the property zoning in Exhibit 3. This should include a zoning map, highlighting any special use or dimensional restrictions on the property. If the present zoning does not allow for the proposed use, please explain current status and how approvals will be obtained.

42 . Does the present zoning allow the proposed development?

43 . Have you applied for a zoning variance, change, special permit or subdivision?

44 . Do you anticipate applying for a comprehensive permit under Chapter 77?

Site Control:

45 . What form of site control do you have?

Include copies of the appropriate site control documents as part of Exhibit 4.

46 . Please provide details about your site control agreement.

- a. Name of Seller:
- b. Principals of seller corporation:
- c. Type of Agreement:
- d. Agreement Date:
- e. Expiration Date:
- f. Purchase price if under agreement:
- g. Is there any identity of interest between buyer and seller?

47 . In the past three years, have there been any defaults on any mortgage on the property or any other forms of financial distress?

48 . Are there any outstanding liens on the property?

Amenities and Services:

49 . Please indicate distance from site and locate on city/town map (Exhibit 1).

	Distance	
a. Shopping facilities	0.10	miles
b. Schools	0.10	miles
c. Hospitals	0.50	miles
d. Parks and recreational facilities	0.10	miles
e. Police station	0.50	miles
f. Fire station	0.50	miles
g. Public transportation	0.10	miles
h. Houses of worship	0.10	miles
i. City/Town Hall	1.00	miles

Environmental Information

- | | |
|--|----------------------------------|
| 50 . Is there any evidence of underground storage tanks or releases of oil or hazardous materials, including hazardous wastes, on the site or within close proximity to the site? | <input type="text" value="No"/> |
| 51 . Has a Chapter 21E assessment been performed? | <input type="text" value="Yes"/> |
| 52 . Does the project consist of either: (a) new construction of more than 100 units; or (b) substantial rehabilitation of more than 200 units, or where more than 10% new floor space is added? | <input type="text" value="No"/> |
| 53 . Does the building require lead paint abatement? | <input type="text" value="No"/> |
| 54 . Does the building require asbestos abatement?
<i>An asbestos report and a plan for abatement are required and should be included in Exhibit 2</i> | <input type="text" value="No"/> |
| 55 . Do radon tests show radon levels exceeding four picocuries/liter? | <input type="text" value="No"/> |
| 56 . Is there any evidence that the premises are insulated with urea formaldehyde foam (UFFI)? | <input type="text" value="No"/> |
| 57 . Is the site located in an historic district, or contain buildings listed or eligible for listing in the State Register of Historic Places? | <input type="text" value="Yes"/> |
| 58 . Are there any above ground storage containers with flammable or explosive petroleum products or chemicals within 1/2 mile of the site? | <input type="text" value="No"/> |
| 59 . Is the site located in a floodplain or wetlands area? | <input type="text" value="No"/> |
| 60 . Does the site contain endangered animal or plant species? | <input type="text" value="No"/> |
| 61 . Is the site subject to noise impact from jet airports within five miles, major highways within 1,000 feet, or rail traffic within 3,000 feet? | <input type="text" value="Yes"/> |

Section 2 DEVELOPMENT TEAM SUMMARY

62 . **Developer/Sponsor Type**

Limited dividend partnership

63 . **Developer/Sponsor:**

Form of Legal Entity
Legal Name
Address

Non-profit corporation	
Newton Community Development Foundation	
425 Watertown Street, Suite 205	
Newton, MA 02458	
Jeanne Strickland, Executive Director	
617-244-4035 x224	
jstrickland@ncdfinc.org	

64 . **Owner/Mortgagor:**

Legal Name
Address

Has this entity already been formed?
Principals
Principals
Contact Person
Telephone No. / Fax. No.
E-mail

Warren House Associates Limited Partnership	
c/o Newton Community Development Foundation	
425 Watertown Street, Suite 205, Newton, MA 02458	
yes	
Jeanne Strickland, Executive Director	
617-244-4035 x224	
jstrickland@ncdfinc.org	

65 . **General Partner:**

Legal Name
Address

Has this entity already been formed?
Principal (if corporate)
Contact Person
% of Ownership
Telephone No. / Fax. No.
E-mail

66 . **General Partner:**

Legal Name
Address

Has this entity already been formed?
Principal (if corporate)
Contact Person
% of Ownership
Telephone No. / Fax. No.
E-mail

No	

67 . Development Consultant:

Legal Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

Community Square Associates LLC
PO Box 286
Arlington, MA 02476
David Levy
(617) 877-6470
dlevy@communitysg.com

68 . Contractor:

Name
 Address

 Fed Tax ID #
 Contact Person
 Telephone No. / Fax. No.
 E-mail

TBD

69 . Architect:

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

Gale Associates, Inc.
300 Ledgewood Place, Suite 300
Rockland, MA 02370
Christopher Musorofiti, RRC
781 335 6465
cm@gainc.com

70 . Management Agent:

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

Newton Community Development Foundation
425 Watertown Street, Suite 205
Newton, MA 02458
Jeanne Strickland, Executive Director
617-244-4035 x224
jstrickland@ncdfinc.org

71 . Attorney (Real Estate):

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

72 . Attorney (Tax):

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

N/A

73 . Syndicator:

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

N/A

74 . Guarantor:

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

Newton Community Development Foundation	
425 Watertown Street, Suite 205	
Newton, MA 02458	
Jeanne Strickland, Executive Director	
617-244-4035 x224	
jstrickland@ncdfinc.org	

75 . Service Provider or Coordinator:

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

Newton Community Development Foundation	
425 Watertown Street, Suite 205	
Newton, MA 02458	
Jeanne Strickland, Executive Director	
617-244-4035 x224	
jstrickland@ncdfinc.org	

76 . Marketing Agent:

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

Newton Community Development Foundation	
425 Watertown Street, Suite 205	
Newton, MA 02458	
Jeanne Strickland, Executive Director	
617-244-4035 x224	
jstrickland@ncdfinc.org	

77 .

Other role

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

78 .

Other role

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

79 . Is there any identity of interest between any members of the development team?

80 . Please describe the relationship of the development entity to sponsoring organizations. Is the entity newly-formed or to-be-formed? Is it a single-purpose corporation? How will the parent corporation provide support to this entity? Include an organizational chart showing other affiliates of the parent corporation, as appropriate, and principals of each.

NCDF is acting as the management agent for Warren House.

Section 3 SOURCES AND USES OF FUNDS

Sources of Funds

Private Equity:

Surplus(Gap) \$0.00
per unit \$0.00

81	Developer's Cash Equity		\$636,598
82	Tax Credit Equity (net amount) <i>(See line 360, Section 5, page 18.)</i>		\$0
83	Developer's Fee/Overhead, Contributed or Loaned		\$0
84	Sponsor Loan:		\$0

Public Equity:

85	HOME Funds, as Loan		\$129,000
86	Loan: Newton CPA		\$2,100,000
87	Loan: Newton AHT		\$1,900,000
88	Total Public Equity		\$4,129,000

Optional user calculations

		Pricing
Fed LIHTC	0	\$0.000
MA LIHTC	0	\$0.000
Fed Hist Credit	0	
MA Historic Credit	0	
TOTAL:	0	
DHCD Subsidy/unit:	0	

Annual Federal Credit: #DIV/0!

Annual State Credit: #DIV/0!

Subordinate Debt (see definition):

		Amount	Rate	Amortiz.	Term
89	HOME Funds, as Subordinate Debt		%	yrs	yrs
	Source:				
90	DHCD		%	yrs	yrs
	Source:				
91	DHCD			0	
	Source:				
92	DHCD			0	
	Source:				
93	DHCD			0	
	Source:				
94	Total Subordinate Debt	\$0			

Permanent Debt (Senior):

		Amount	Rate	Override	Amortiz.	Term	MIP
95	MHFA MHFA Program 1	\$	%	%	yrs	yrs	%
96	MHFA MHFA Program 2	\$	%	%	yrs	yrs	%
97	Permanent Loan	\$6,830,000	7.00%		40.00	40.00	0.250%
98	Other Permanent Senior Mortgage						
	Source:						
99	Other Permanent Senior Mortgage	\$	%		yrs	yrs	%
	Source:						
100	Total Permanent Senior Debt	\$6,830,000					
101	Total Permanent Sources	\$11,595,598					

Construction Period Financing:

		Amount	Rate	Term
102	Construction Loan			
	Source:			
	Repaid at:		<i>(event)</i>	
103	Other Interim Loan			
	Source:			
	Repaid at:		<i>(event)</i>	
104	Sponsor Bridge Loan			
	Source:			
	Repaid at:		<i>(event)</i>	

Uses of Funds

The Contractor certifies that, to the best of their knowledge, the construction estimates, and trade-item breakdown on this page are complete and accurate.

Direct Construction:

105 . Who prepared the estimates?

<i>Name</i>	<i>Signature</i>

106 . Basis for estimates?

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	DV	Trade Item	Amount	Description
107 .	3	Concrete		
108 .	4	Masonry		
109 .	5	Metals		
110 .	6	Rough Carpentry		
111 .	6	Finish Carpentry		
112 .	7	Fireproofing		
113 .	7	Insulation		
114 .	7	Roofing, Sheet Metal and Flashing		
115 .	7	Damp Proofing & Waterproofing		
116 .	7	Exterior Siding		
117 .	8	Doors		
118 .	8	Windows		
119 .	8	Glass		
120 .	9	Louvers		
121 .	9	Drywall		
122 .	9	Flooring		
123 .	9	Acoustical		
124 .	9	Wood Flooring		
125 .	9	Resilient Flooring		
126 .	9	Carpet		
127 .	9	Paint & Decorating		
128 .	10	Specialties		
129 .	11	Special Equipment		
130 .	11	Cabinets		
131 .	11	Appliances		
132 .	12	Blinds & Shades		
133 .	13	Modular/Manufactured		
134 .	13	Special Construction		
135 .	14	Elevators or Conveying Syst.		
136 .	15	Plumbing & Hot Water		
137 .	15	Heat & Ventilation		
138 .	15	Air Conditioning		
139 .	15	Fire Protection		
140 .	16	Electrical		
141 .		Winter Conditions		
142 .		Radon Mitigation System		
143 .		Subtotal Structural	\$0	
144 .	2	Earth Work		
145 .	2	Site Utilities		
146 .	2	Roads & Walks		
147 .	2	Site Improvement		
148 .	2	Lawns & Planting		
149 .	2	Geotechnical Conditions		
150 .	2	Environmental Remediation		
151 .	2	Demolition		
152 .	2	Unusual Site Cond		
153 .		Subtotal Site Work	\$0	
154 .		Total Improvements	\$0	
155 .	1	General Conditions		
156 .		Subtotal	\$0	
157 .	1	Builders Overhead & Profit		
158 .	1	Payment & Performance Bonds	\$4,978,600	
159 .		TOTAL	\$4,978,600	

160 Total Cost/square foot:

\$	82.98
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 Residential Cost/s.f.:

\$82.98

% commercial SF: -

% commercial const: -

Development Budget:

	Total	Residential	Off-Budget	Comments
161 Acquisition: Land	\$5,138,747	\$5,138,747	\$0	2nd mortgage plus interest repayment (MH) + ground lease
162 Acquisition: Building	\$0	\$0	\$0	
163 Acquisition Subtotal	\$5,138,747	\$5,138,747	\$0	
164 Direct Construction Budget	\$ 4,978,600	\$4,978,600	-	(from line 159)
165 Construction Contingency	\$497,860	497,860.00	-	10.0% of construction
166 Subtotal: Construction	\$5,476,460	\$5,476,460	\$0	

General Development Costs:

167 Architecture & Engineering	\$182,000	\$182,000	\$0	
168 Survey and Permits	\$68,527	\$68,527	\$0	
169 Clerk of the Works	\$42,062	\$42,062	\$0	
170 Environmental Engineer	\$5,000	\$5,000	\$0	
171 Bond Premium	\$0	\$0	\$0	
172 Legal	\$50,000	\$50,000	\$0	
173 Title and Recording	\$35,081	\$35,081	\$0	
174 Accounting & Cost Cert.	\$15,000	\$15,000	\$0	
175 Marketing and Rent Up	\$0	\$0	\$0	
176 Real Estate Taxes	\$0	\$0	\$0	
177 Insurance	\$0	\$0	\$0	
178 Relocation	\$0	\$0	\$0	
179 Appraisal	\$20,000	\$20,000	\$0	
180 Utilities	\$0	\$0	\$0	
181 Construction Loan Interest	\$0	\$0	\$0	
182 Inspecting Engineer	\$15,483	\$15,483	\$0	
183 Fees to: Lender Legal	\$0	\$0	\$0	
184 Fees to: Loan Fees	\$174,165	\$174,165	\$0	
185 FF&E	\$0	\$0	\$0	
186 LIHTC Fee	\$0	\$0	\$0	
187 Letter of Credit Fees	\$0	\$0	\$0	
188 Other Financing Fees	\$0	\$0	\$0	
189 Development Consultant	\$35,583	\$35,583	\$0	
190 Other: Loan Fees	\$0	\$0	\$0	
191 Other: Misc.	\$0	\$0	\$0	
192 Soft Cost Contingency	\$64,290	\$64,290	\$0	10.0% of soft costs
193 Subtotal: Gen. Dev.	\$707,191	\$707,191	\$0	

194 Subtotal: Acquis., Const., and Gen. Dev.	\$11,322,398	\$11,322,398	\$0
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195 Capitalized Reserves	\$273,200	\$273,200	\$0
196 Developer Overhead	\$0	\$0	\$0.00
197 Developer Fee	\$0	\$0	\$0.00

198 Total Development Cost	\$11,595,598	\$11,595,598	\$0
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Residential TDC per unit \$196,536

TDC per unit with land: \$196,535.56

199 TDC, Net	\$11,322,398	\$11,322,398	\$0
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TDC, Net per unit \$191,905.05

Additional Detail on Development Pro-Forma:

200 . Gross Syndication Investment	<input type="text"/>
Off-Budget Costs:	
Syndication Costs:	
201 . Syndication Legal	<input type="text"/>
202 . Syndication Fees	<input type="text"/>
203 . Syndication Consultants	<input type="text"/>
204 . Bridge Financing Costs	<input type="text"/>
205 . Investor Servicing (capitalized)	<input type="text"/>
206 . Other Syndication Expenses	<input type="text"/>
207 . Total Syndication Expense	<input type="text" value="\$0"/>
208 . Current Reserve Balance	<input type="text"/>
Reserves (capitalized):	
209 . Development Reserves	<input type="text"/>
210 . Initial Rent-Up Reserves	<input type="text"/>
211 . Operating Reserves	<input type="text" value="\$273,200"/>
212 . Net Worth Account	<input type="text"/>
213 . Other Capitalized Reserves	<input type="text"/>
214 . Subtotal: Capitalized Reserves	<input type="text" value="\$273,200"/>
215 . Letter of Credit Requirements	<input type="text"/>
216 . Total of the Above	<input type="text" value="\$273,200"/>

Check: Line 214 is the same as line 195.

Please Answer The Following	Dev. Reserves	Initial Rent-Up	Op. Reserves	Net Worth	Other	Letter of Credit
Who requires the reserves?						
Who administers the reserves?						
When and how are they used?						
Under what circumstances can they be released?						

Unit Sales (For Sale Projects Only):

217 . Gross Sales From Units	<input type="text" value="\$0"/>
218 . Cost of Sales (Commissions, etc.)	<input type="text" value="\$0"/>
219 . Net Receipt from Sales	<input type="text" value="\$0"/>

Debt Service Requirements:

220 . Minimum Debt Service Coverage	<input type="text" value="1.15"/>
221 . Is this Project subject to HUD Subsidy Layering Review?	<input type="text" value="Yes"/>

Optional user comments

Section 4 OPERATING PRO-FORMA

Operating Income				
Rent Schedule:	Contract	Utility	Total	No. of
	Rent	Allowance	Gross Rent	Units
222 . Low-Income (Rental Assisted):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom	\$ 2,042	\$108	\$2,150	2
2 bedrooms	\$ 2,253	\$147	\$2,400	7
3 bedrooms	\$ 2,829	\$171	\$3,000	2
4 bedrooms			\$0	0
223 . Low-Income (below 50%):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom	\$1,141	\$108	\$1,249	2
2 bedrooms	\$1,351	\$147	\$1,498	7
3 bedrooms	\$1,561	\$171	\$1,732	1
4 bedrooms			\$0	0
224 . Low-Income (below 60%):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
225 . Other Income 80%	Below 80% of the median income for the region			
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom	\$1,884	\$108	\$1,992	1
2 bedrooms	\$2,244	\$147	\$2,391	3
3 bedrooms			\$0	0
4 bedrooms			\$0	0
226 . Market Rate (unrestricted occupancy):				
SRO				0
0 bedroom				0
1 bedroom	\$2,225			10
2 bedrooms	\$2,745			21
3 bedrooms	\$3,020			3
4 bedrooms				0
			Total Units:	59
Commercial Income:		(average)		
227 . Square Feet: <input style="width: 50px;" type="text" value="0"/>	@	<input style="width: 50px;" type="text" value="\$0.00"/>	/square foot =	<input style="width: 50px;" type="text" value="\$0"/>
Parking Income:		(average)		
228 . Spaces: <input style="width: 50px;" type="text" value="192"/>	@	<input style="width: 50px;" type="text" value="\$0.00"/>	/month x 12 =	<input style="width: 50px;" type="text" value="\$0"/>

Warren House

Application Date: 2/15/23

Revised Date: 4/17/23

Operating Expenses				
Annual Operating Exp.:	Total	Residential	Commercial	Comments
250 Management Fee	\$62,755	\$62,755.00	\$0	
251 Payroll, Administrative	\$100,586	\$100,586	\$0	
252 Payroll Taxes & Benefits, Admin.	\$23,843	\$23,843	\$0	
253 Legal	\$5,000	\$5,000	\$0	
254 Audit	\$15,575	\$15,575	\$0	
255 Marketing	\$15,000	\$15,000	\$0	
256 Telephone	\$4,500	\$4,500	\$0	
257 Office Supplies	\$2,500	\$2,500	\$0	
258 Accounting & Data Processing	\$22,312	\$22,312	\$0	
259 Investor Servicing	\$0	\$0	\$0	
260 DHCD Monitoring Fee	\$0	\$0	\$0	
261 Other: Central Office Fee	\$2,705	\$2,705	\$0	
262 Other: Training, Certifications	\$15,000	\$15,000	\$0	
263 Subtotal: Administrative	\$207,021	\$207,021	\$0	
264 Payroll, Maintenance	\$64,947	\$64,947	\$0	
265 Payroll Taxes & Benefits, Admin.	\$34,719	\$34,719	\$0	
266 Janitorial Materials	\$6,000	\$6,000	\$0	
267 Landscaping	\$30,325	\$30,325	\$0	
268 Decorating (inter. only)	\$36,000	\$36,000	\$0	
269 Repairs (inter. & ext.)	\$39,300	\$39,300	\$0	
270 Elevator Maintenance	\$4,500	\$4,500	\$0	
271 Trash Removal	\$20,000	\$20,000	\$0	
272 Snow Removal	\$28,000	\$28,000	\$0	
273 Extermination	\$2,500	\$2,500	\$0	
274 Recreation	\$0	\$0	\$0	
275 Other: ADA Accommodations	\$13,500	\$13,500	\$0	
276 Subtotal: Maintenance	\$279,791	\$279,791	\$0	
277 Resident Services	\$25,000	\$25,000	\$0	
278 Security	\$1,500	\$1,500	\$0	
279 Electricity	\$53,000	\$53,000	\$0	common
280 Natural Gas	\$9,121	\$9,121	\$0	paid by tenants
281 Oil	\$0	\$0	\$0	
282 Water & Sewer	\$58,000	\$58,000	\$0	
283 Subtotal: Utilities	\$120,121	\$120,121	\$0	
284 Replacement Reserve	\$29,500	\$29,500	\$0	
285 Operating Reserve	\$0	\$0	\$0	
286 Real Estate Taxes	\$120,000	\$120,000	\$0	
287 Other Taxes	\$0	\$0	\$0	
288 Insurance	\$96,673	\$96,673	\$0	
289 MIP	\$17,035	\$17,035	\$0	
290 Other:	\$0	\$0	\$0	
291 Subtotal: Taxes, Insurance	\$233,708	\$233,708	\$0	
292 TOTAL EXPENSES	\$959,396	\$959,396	\$0	Per Unit: \$16,260.94

Other Operating Expense Assumptions

Trending Assumptions for Expenses

	Year 2	Year 3	Years 4-5	Years 6-20
293 Sewer & Water	3.0%	3.0%	3.0%	3.0%
294 Real Estate Taxes	3.0%	3.0%	3.0%	3.0%
295 All Other Operating Expenses	3.0%	3.0%	3.0%	3.0%

Reserve Requirements:

296 Replacement Reserve Requirement	\$636.00	per unit per year
297 Operating Reserve Requirement	\$0.00	per unit per year

Debt Service:

		Annual Payment
298 MHFA	MHFA Program 1	N/A
299 MHFA	MHFA Program 2	N/A
300 MHP Fund Permanent Loan		\$509,325
301 Other Permanent Senior Mortgage		N/A
Source:	N/A	
302 Other Permanent Senior Mortgage		N/A
Source:	N/A	
303 Total Debt Service (Annual)		\$509,325
304 Net Operating Income		\$609,482 (in year one)
305 Debt Service Coverage		1.20 (in year one)

Affordability: Income Limits and Maximum Allowable Rents

306 County	SUFFOLK	MSA	Boston-Cambridge-Quincy, MA-NH
This MSA does not match the county you have chosen			
307 Maximum Allowed Rents, by Income, by Unit Size:	Income Limits last updated on 9/19/2016		

	Maximum Income			Maximum Rent (calculated from HUD income data)		
	50%	60%	80%	50%	60%	80%
SRO	\$34,500	\$41,350	\$55,150	\$863	\$1,034	\$1,379
0 bedroom	\$34,500	\$41,350	\$55,150	\$863	\$1,034	\$1,379
1 bedroom	\$36,950	\$44,350	\$59,100	\$924	\$1,109	\$1,478
2 bedrooms	\$44,350	\$53,200	\$70,900	\$1,109	\$1,330	\$1,773
3 bedrooms	\$51,200	\$61,450	\$81,950	\$1,280	\$1,536	\$2,049
4 bedrooms	\$57,150	\$68,550	\$91,400	\$1,429	\$1,714	\$2,285
Area median income for a family of	\$98,500					

308 H.U.D. "Fair Market Rents" (Maximum):

0 bedroom	\$1,071
1 bedroom	\$1,196
2 bedrooms	\$1,494
3 bedrooms	\$1,861
4 bedrooms	\$2,023
5 bedrooms	\$2,326

FMR Information last updated on 9/19/2016

Operations before this transaction:				Operations after:		
Type	Number	Current Rent	Annualized Income	Number	Future Rents	Market Rent GPR
309 . SRO	0	0	0	0	0	0
310 . 0 bedroom	0	0	0	0	0	0
311 . 1 bedroom	15	0	0	15	0	0
312 . 2 bedrooms	38	0	0	38	0	0
313 . 3 bedrooms	6	0	0	6	0	0
314 . 4 bedrooms	0	0	0	0	0	0
315 . Gross Potential Rental Income			0			0
316 . Vacancy		0%	0	Vacancy	5%	-81,830
317 . Other Income			0	Other Income		14,100
318 . Effective Gross Income			0	Effective Gross Income		-67,730
Operating Expenses				Year	Reason	% Change
319 . Management fee			0			62,755
320 . Administration			0			207,021
321 . Maintance/Operations			0			279,791
322 . Resident Services			0			25,000
323 . Security			0			1,500
324 . Utilities			0			120,121
325 . Replacement Reserve			0			29,500
326 . Operating Reserve			0			0
327 . Real Esate Taxes			0			120,000
328 . Insurance			0			113,708
329 . Total Expenses			0			959,396
330 . Net Operating Income			0	Net Operating Income		-1,027,126
331 . Transaction Description:						
<i>Optional user calculations</i>						

Project Summary Information

NOTE: Do not fill out this section. It is automatically filled in by program.

Project Name	Warren House
Developer	Newton Community Development Foundation
Community	Newton

Number of Units 59

SRO	0	Low-Income, Rental Assisted	11
0 bedroom	0	Low-Income, Below 50%	10
1 bedroom	15	Low-Income, Below 60%	0
2 bedrooms	38	Other Income 80%	4
3 bedrooms	6	Market Rate	34
4 bedrooms	0		

This is an application for:

DHCD Tax Credit Allocation	No
HOME Funding through DHCD	No
MHFA Official Action Status.....	No
MHFA Construction Financing.....	No
MHFA Permanent Financing	No
MHP Fund Financing	No
MHIC Construction Loan.....	No
MHIC Tax Credit Equity	No
Boston: DND.....	No
Other.....	N/A
Other.....	N/A
Other.....	N/A
Financing from Massdevelopment.....	No

Sources of Funds:

Developer's Equity	\$636,598
Tax Credit Equity	\$0
Public Equity	\$4,129,000
Subordinate Debt	\$0
Permanent Debt	\$6,830,000
Total All Sources	\$11,595,598

Uses Exceed Sources by \$0

Uses of Funds:

Acquisition	\$5,138,747
Construction	\$5,476,460
General Development	\$707,191
Developer Overhead	\$0
Developer Fee	\$0
Capitalized Reserves.....	\$273,200
Total All Uses	\$11,595,598

Rent Levels:

Low-Income, Rental Assisted	\$2,319
Low-Income, Below 50%	\$1,330
Low-Income, Below 60%	N/A
Other Income 80%.....	\$2,154
Market Rate	\$2,616
<i>Average, All Units</i>	<i>\$2,312</i>

BR (aver.)

2.0
1.9
N/A
1.8
1.8
1.8

SF (aver.)

800
780
N/A
750
759
769

Annual Operating Income (year 1):

Gross rental income (residential)	\$1,636,608
Vacancy (resid.) 5.00%	\$81,830
Other Income (net of vacancies)	\$14,100
Subtotal	\$1,568,878
Operating Subsidies	\$0
Draw on Operating Reserves	\$0
Total Annual Income	\$1,568,878
Net Operating Income	\$609,482
Debt Service	\$509,325
Debt Service Coverage	1.20

Annual Operating Expense (year 1):

Management Fee	\$62,755
Administrative	\$207,021
Maintenance	\$279,791
Res. Service, Security	\$26,500
Utilities	\$120,121
Repl. Reserve	\$29,500
Oper. Reserve	\$0
Taxes, Insurance	\$233,708
Total	\$959,396
Total per Unit	\$16,261

Rent Profile Analysis

NOTE: Do not fill out this section. It is automatically filled in by program.

	Units	Contract Rent	Size of Unit	No. of Bathrooms	Gross Rent/ Maximum	Rent per square foot
Low-Income (Rental Assisted):						
SRO	0	N/A	N/A	N/A	N/A	N/A
0 bedroom	0	N/A	N/A	N/A	N/A	N/A
1 bedroom	2	\$2,042	600	1	179.8%	\$3.40
2 bedrooms	7	\$2,253	800	2	160.6%	\$2.82
3 bedrooms	2	\$2,829	1,000	2	161.2%	\$2.83
4 bedrooms	0	N/A	N/A	N/A	N/A	N/A

Low-Income (below 50%):						
SRO	0	N/A	N/A	N/A	N/A	N/A
0 bedroom	0	N/A	N/A	N/A	N/A	N/A
1 bedroom	2	\$1,141	600	1	135.2%	\$1.90
2 bedrooms	7	\$1,351	800	2	135.1%	\$1.69
3 bedrooms	1	\$1,561	1,000	2	135.3%	\$1.56
4 bedrooms	0	N/A	N/A	N/A	N/A	N/A

Low-Income (below 60%):						
SRO	0	N/A	N/A	N/A	N/A	N/A
0 bedroom	0	N/A	N/A	N/A	N/A	N/A
1 bedroom	0	N/A	N/A	N/A	N/A	N/A
2 bedrooms	0	N/A	N/A	N/A	N/A	N/A
3 bedrooms	0	N/A	N/A	N/A	N/A	N/A
4 bedrooms	0	N/A	N/A	N/A	N/A	N/A

	Below 80% of the median income for the region					
Other Income 80%						
SRO	0	N/A	N/A	N/A	N/A	N/A
0 bedroom	0	N/A	N/A	N/A	N/A	N/A
1 bedroom	1	\$1,884	600	1	134.8%	\$3.14
2 bedrooms	3	\$2,244	800	2	134.9%	\$2.81
3 bedrooms	0	N/A	N/A	N/A	N/A	N/A
4 bedrooms	0	N/A	N/A	N/A	N/A	N/A

Market Rate (unrestricted occupancy):						
SRO	0	N/A	N/A	N/A		N/A
0 bedroom	0	N/A	N/A	N/A		N/A
1 bedroom	10	\$2,225	600	1		\$3.71
2 bedrooms	21	\$2,745	800	2		\$3.43
3 bedrooms	3	\$3,020	1,000	2		\$3.02
4 bedrooms	0	N/A	N/A	N/A		N/A

21-Year Operating Proforma (Years 1-5)

NOTE: Do not fill out this section. It is automatically filled in by program.

Calendar Year:	Year 1 N/A	Year 2 N/A	Year 3 N/A	Year 4 N/A	Year 5 N/A
INCOME:					
Low-Income, Rental Assisted	\$306,156	\$312,279	\$318,525	\$324,895	\$331,393
Low-Income, Below 50%	159,600	162,792	166,048	169,369	172,756
Low-Income, Below 60%	0	0	0	0	0
Other Income 80%	103,392	105,460	107,569	109,720	111,915
Market Rate	1,067,460	1,088,809	1,110,585	1,132,797	1,155,453
<i>Gross Potential Income</i>	1,636,608	1,669,340	1,702,727	1,736,782	1,771,517
Less vacancy	81,830	83,467	85,136	86,839	88,576
<i>Effective Gross Residential Income</i>	1,554,778	1,585,873	1,617,591	1,649,942	1,682,941
Commercial (includes parking)	0	0	0	0	0
Less vacancy	0	0	0	0	0
Net Commercial Income	0	0	0	0	0
<i>Effective Rental Income</i>	1,554,778	1,585,873	1,617,591	1,649,942	1,682,941
Other Income: Laundry	13,500	13,770	14,045	14,326	14,613
Other Income: Interest	600	600	600	600	600
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
<i>Total Gross Income</i>	1,568,878	1,600,243	1,632,236	1,664,869	1,698,154
Operating Subsidies	0	0	0	0	0
Draw on Operating Reserves	0	0	0	0	0
<i>Total Effective Income</i>	\$1,568,878	\$1,600,243	\$1,632,236	\$1,664,869	\$1,698,154
EXPENSES:					
Management Fee	62,755	64,010	65,289	66,595	67,926
Administrative	207,021	213,232	219,629	226,217	233,004
Maintenance	279,791	288,185	296,830	305,735	314,907
Resident Services	25,000	25,750	26,523	27,318	28,138
Security	1,500	1,545	1,591	1,639	1,688
Electrical	53,000	54,590	56,228	57,915	59,652
Natural Gas	9,121	9,395	9,676	9,967	10,266
Oil (heat)	0	0	0	0	0
Water & Sewer	58,000	59,740	61,532	63,378	65,280
Replacement Reserve	29,500	30,385	31,297	32,235	33,203
Operating Reserve	0	0	0	0	0
Real Estate Taxes	120,000	123,600	127,308	131,127	135,061
Other Taxes	0	0	0	0	0
Insurance	96,673	99,573	102,560	105,637	108,806
MIP	17,035	16,951	16,862	16,766	16,663
Other:	0	0	0	0	0
<i>Total Operating Expenses</i>	\$959,396	\$986,955	\$1,015,325	\$1,044,529	\$1,074,593
NET OPERATING INCOME	\$609,482	\$613,288	\$616,911	\$620,339	\$623,561
Debt Service	\$509,325	\$509,325	\$509,325	\$509,325	\$509,325
<i>Debt Service Coverage</i>	1.20	1.20	1.21	1.22	1.22
Project Cash Flow	\$100,157	\$103,963	\$107,586	\$111,014	\$114,236
	\$3,338.56	\$3,465.44	\$3,586.20	\$3,700.47	\$3,807.87
Required Debt Coverage	\$585,724	\$585,724	\$585,724	\$585,724	\$585,724
(Gap)/Surplus for Cov.	\$23,758	\$27,564	\$31,187	\$34,615	\$37,837

21-Year Operating Proforma (Years 6-10)

NOTE: Do not fill out this section. It is automatically filled in by program.

Calendar Year:	Year 6 N/A	Year 7 N/A	Year 8 N/A	Year 9 N/A	Year 10 N/A
INCOME:					
Low-Income, Rental Assisted	\$338,021	\$344,781	\$351,677	\$358,711	\$365,885
Low-Income, Below 50%	176,211	179,736	183,330	186,997	190,737
Low-Income, Below 60%	0	0	0	0	0
Other Income 80%	114,153	116,436	118,765	121,140	123,563
Market Rate	1,178,562	1,202,133	1,226,176	1,250,700	1,275,714
<i>Gross Potential Income</i>	1,806,947	1,843,086	1,879,948	1,917,547	1,955,898
Less vacancy	90,347	92,154	93,997	95,877	97,795
<i>Effective Gross Residential Income</i>	1,716,600	1,750,932	1,785,951	1,821,670	1,858,103
Commercial Income	0	0	0	0	0
Less vacancy	0	0	0	0	0
Net Commercial Income	0	0	0	0	0
<i>Effective Rental Income</i>	1,716,600	1,750,932	1,785,951	1,821,670	1,858,103
Laundry Income	14,905	15,203	15,507	15,817	16,134
Other Income: Interest	600	600	600	600	600
Other Income: -	0	0	0	0	0
Other Income: -	0	0	0	0	0
Other Income: -	0	0	0	0	0
Other Income: -	0	0	0	0	0
Other Income: -	0	0	0	0	0
<i>Total Gross Income</i>	1,732,105	1,766,735	1,802,058	1,838,087	1,874,837
Operating Subsidies	0	0	0	0	0
Draw on Operating Reserves	0	0	0	0	0
<i>Total Effective Income</i>	\$1,732,105	\$1,766,735	\$1,802,058	\$1,838,087	\$1,874,837
EXPENSES:					
Management Fee	69,284	70,669	72,082	73,523	74,993
Administrative	239,994	247,194	254,610	262,248	270,115
Maintenance	324,354	334,085	344,108	354,431	365,064
Resident Services	28,982	29,851	30,747	31,669	32,619
Security	1,739	1,791	1,845	1,900	1,957
Electrical	61,442	63,285	65,183	67,139	69,153
Natural Gas	10,574	10,891	11,218	11,554	11,901
Oil (heat)	0	0	0	0	0
Water & Sewer	67,238	69,255	71,333	73,473	75,677
Replacement Reserve	34,199	35,225	36,281	37,370	38,491
Operating Reserve	0	0	0	0	0
Real Estate Taxes	139,113	143,286	147,585	152,012	156,573
Other Taxes	0	0	0	0	0
Insurance	112,071	115,433	118,896	122,462	126,136
MIP	16,552	16,434	16,307	16,171	16,025
Other:	0	0	0	0	0
<i>Total Operating Expenses</i>	\$1,105,541	\$1,137,399	\$1,170,193	\$1,203,953	\$1,238,704
NET OPERATING INCOME	\$626,565	\$629,337	\$631,865	\$634,135	\$636,133
Debt Service	\$509,325	\$509,325	\$509,325	\$509,325	\$509,325
<i>Debt Service Coverage</i>	1.23	1.24	1.24	1.25	1.25
Project Cash Flow	\$117,239	\$120,012	\$122,540	\$124,810	\$126,808
	\$3,907.98	\$4,000.39	\$4,084.65	\$4,160.32	\$4,226.92
Required Debt Coverage	\$585,724	\$585,724	\$585,724	\$585,724	\$585,724
(Gap)/Surplus for Cov.	\$40,841	\$43,613	\$46,141	\$48,411	\$50,409

21-Year Operating Proforma (Years 11-15)

NOTE: Do not fill out this section. It is automatically filled in by program.

<i>Calendar Year:</i>	<i>Year 11</i> N/A	<i>Year 12</i> N/A	<i>Year 13</i> N/A	<i>Year 14</i> N/A	<i>Year 15</i> N/A
INCOME:					
Low-Income, Rental Assisted	\$373,202	\$380,667	\$388,280	\$396,045	\$403,966
Low-Income, Below 50%	194,552	198,443	202,411	206,460	210,589
Low-Income, Below 60%	0	0	0	0	0
Other Income 80%	126,034	128,555	131,126	133,749	136,424
Market Rate	1,301,228	1,327,252	1,353,797	1,380,873	1,408,491
<i>Gross Potential Income</i>	1,995,016	2,034,916	2,075,615	2,117,127	2,159,469
Less vacancy	99,751	101,746	103,781	105,856	107,973
<i>Effective Gross Residential Income</i>	1,895,265	1,933,171	1,971,834	2,011,271	2,051,496
Commercial (includes parking)	0	0	0	0	0
Less vacancy	0	0	0	0	0
Net Commercial Income	0	0	0	0	0
<i>Effective Rental Income</i>	1,895,265	1,933,171	1,971,834	2,011,271	2,051,496
Other Income: Laundry	16,456	16,786	17,121	17,464	17,813
Other Income: Interest	600	600	600	600	600
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
<i>Total Gross Income</i>	1,912,322	1,950,556	1,989,555	2,029,334	2,069,909
Operating Subsidies	0	0	0	0	0
Draw on Operating Reserves	0	0	0	0	0
<i>Total Effective Income</i>	\$1,912,322	\$1,950,556	\$1,989,555	\$2,029,334	\$2,069,909
EXPENSES:					
Management Fee	76,493	78,022	79,582	81,173	82,796
Administrative	278,219	286,565	295,162	304,017	313,138
Maintenance	376,016	387,296	398,915	410,883	423,209
Resident Services	33,598	34,606	35,644	36,713	37,815
Security	2,016	2,076	2,139	2,203	2,269
Electrical	71,228	73,364	75,565	77,832	80,167
Natural Gas	12,258	12,626	13,004	13,394	13,796
Oil (heat)	0	0	0	0	0
Water & Sewer	77,947	80,286	82,694	85,175	87,730
Replacement Reserve	39,646	40,835	42,060	43,322	44,621
Operating Reserve	0	0	0	0	0
Real Estate Taxes	161,270	166,108	171,091	176,224	181,511
Other Taxes	0	0	0	0	0
Insurance	129,920	133,818	137,833	141,968	146,227
MIP	15,868	15,700	15,520	15,327	15,120
Other:	0	0	0	0	0
<i>Total Operating Expenses</i>	\$1,274,478	\$1,311,303	\$1,349,210	\$1,388,231	\$1,428,399
NET OPERATING INCOME	\$637,844	\$639,253	\$640,345	\$641,103	\$641,510
Debt Service	\$509,325	\$509,325	\$509,325	\$509,325	\$509,325
<i>Debt Service Coverage</i>	1.25	1.26	1.26	1.26	1.26
Project Cash Flow	\$128,519	\$129,928	\$131,020	\$131,778	\$132,185
	\$4,283.96	\$4,330.94	\$4,367.33	\$4,392.59	\$4,406.15
Required Debt Coverage	\$585,724	\$585,724	\$585,724	\$585,724	\$585,724
(Gap)/Surplus for Cov.	\$52,120	\$53,530	\$54,621	\$55,379	\$55,786

21-Year Operating Proforma (Years 16-21)

NOTE: Do not fill out this section. It is automatically filled in by program.

Calendar Year:	Year 16 N/A	Year 17 N/A	Year 18 N/A	Year 19 N/A	Year 20 N/A	Year 21 N/A
INCOME:						
Low-Income, Rent. Astd.	\$412,046	\$420,287	\$428,692	\$437,266	\$446,011	\$454,932
Low-Income, Below 50%	214,801	219,097	223,479	227,948	232,507	237,157
Low-Income, Below 60%	0	0	0	0	0	0
Other Income 80%	139,152	141,935	144,774	147,669	150,623	153,635
Market Rate	1,436,661	1,465,394	1,494,702	1,524,596	1,555,088	1,586,189
<i>Gross Potential Income</i>	2,202,659	2,246,712	2,291,646	2,337,479	2,384,229	2,431,913
Less vacancy	110,133	112,336	114,582	116,874	119,211	121,596
<i>Eff. Gross Res. Income</i>	2,092,526	2,134,376	2,177,064	2,220,605	2,265,017	2,310,318
Commercial Income	0	0	0	0	0	0
Less vacancy	0	0	0	0	0	0
Net Commercial Income	0	0	0	0	0	0
<i>Effective Rental Income</i>	2,092,526	2,134,376	2,177,064	2,220,605	2,265,017	2,310,318
Other Income: Laundry	18,169	18,533	18,903	19,281	19,667	20,060
Other Interest	600	600	600	600	600	600
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
<i>Total Gross Income</i>	2,111,295	2,153,509	2,196,567	2,240,487	2,285,284	2,330,978
Operating Subsidies	0	0	0	0	0	0
Draw on Operating Res.	0	0	0	0	0	0
<i>Total Effective Income</i>	\$2,111,295	\$2,153,509	\$2,196,567	\$2,240,487	\$2,285,284	\$2,330,978
EXPENSES:						
Management Fee	84,452	86,140	87,863	89,619	91,411	93,239
Administrative	322,532	332,208	342,174	352,439	363,013	373,903
Maintenance	435,905	448,982	462,452	476,325	490,615	505,334
Resident Services	38,949	40,118	41,321	42,561	43,838	45,153
Security	2,337	2,407	2,479	2,554	2,630	2,709
Electrical	82,572	85,049	87,601	90,229	92,936	95,724
Natural Gas	14,210	14,637	15,076	15,528	15,994	16,474
Oil (heat)	0	0	0	0	0	0
Water & Sewer	90,362	93,073	95,865	98,741	101,703	104,754
Replacement Reserve	45,960	47,339	48,759	50,222	51,728	53,280
Operating Reserve	0	0	0	0	0	0
Real Estate Taxes	186,956	192,565	198,342	204,292	210,421	216,733
Other Taxes	0	0	0	0	0	0
Insurance	150,613	155,132	159,786	164,579	169,517	174,602
MIP	14,898	14,660	14,405	14,131	13,838	13,523
Other:	0	0	0	0	0	0
<i>Total Operating Expenses</i>	\$1,469,747	\$1,512,310	\$1,556,122	\$1,601,221	\$1,647,644	\$1,695,429
NET OPER. INC.	\$641,548	\$641,199	\$640,445	\$639,265	\$637,641	\$635,549
Debt Service	\$509,325	\$509,325	\$509,325	\$509,325	\$509,325	\$509,325
<i>Debt Service Coverage</i>	1.26	1.26	1.26	1.26	1.25	1.25
Project Cash Flow	\$132,223	\$131,874	\$131,120	\$129,940	\$128,316	\$126,224
	\$4,407.42	\$4,395.80	\$4,370.66	\$4,331.35	\$4,277.18	
Required Debt Coverage	\$585,724	\$585,724	\$585,724	\$585,724	\$585,724	\$585,724
(Gap)/Surplus for Cov.	\$55,824	\$55,475	\$54,721	\$53,542	\$51,917	\$49,825

Operating Expense Analysis

NOTE: Do not fill out this section. It is automatically filled in by program.

	Residential Total	Residential Per Unit	Residential Per S. F.	Commercial Total	Commercial Per S. F.
Management Fee	\$62,755	\$1,063.64	\$1.05	\$0	N/A
Payroll, Administrative	\$100,586	\$1,704.85	\$1.68	\$0	N/A
Payroll Taxes & Benefits, Admin.	\$23,843	\$404.12	\$0.40	\$0	N/A
Legal	\$5,000	\$84.75	\$0.08	\$0	N/A
Audit	\$15,575	\$263.98	\$0.26	\$0	N/A
Marketing	\$15,000	\$254.24	\$0.25	\$0	N/A
Telephone	\$4,500	\$76.27	\$0.08	\$0	N/A
Office Supplies	\$2,500	\$42.37	\$0.04	\$0	N/A
Accounting & Data Processing	\$22,312	\$378.17	\$0.37	\$0	N/A
Investor Servicing	\$0	\$0.00	\$0.00	\$0	N/A
DHCD Monitoring Fee	\$0	\$0.00	\$0.00	\$0	N/A
Other:	\$2,705	\$45.85	\$0.05	\$0	N/A
Other:	\$15,000	\$254.24	\$0.25	\$0	N/A
Subtotal: Administrative	\$207,021	\$3,508.83	\$3.45	\$0	N/A
Payroll, Maintenance	\$64,947	\$1,100.80	\$1.08	\$0	N/A
Payroll Taxes & Benefits, Admin.	\$34,719	\$588.46	\$0.58	\$0	N/A
Janitorial Materials	\$6,000	\$101.69	\$0.10	\$0	N/A
Landscaping	\$30,325	\$513.98	\$0.51	\$0	N/A
Decorating (inter. only)	\$36,000	\$610.17	\$0.60	\$0	N/A
Repairs (inter. & ext.)	\$39,300	\$666.10	\$0.66	\$0	N/A
Elevator Maintenance	\$4,500	\$76.27	\$0.08	\$0	N/A
Trash Removal	\$20,000	\$338.98	\$0.33	\$0	N/A
Snow Removal	\$28,000	\$474.58	\$0.47	\$0	N/A
Extermination	\$2,500	\$42.37	\$0.04	\$0	N/A
Recreation	\$0	\$0.00	\$0.00	\$0	N/A
Other:	\$13,500	\$228.81	\$0.23	\$0	N/A
Subtotal: Maintenance	\$279,791	\$4,742.22	\$4.66	\$0	N/A
Resident Services	\$25,000	\$423.73	\$0.42	\$0	N/A
Security	\$1,500	\$25.42	\$0.03	\$0	N/A
Electricity	\$53,000	\$898.31	\$0.88	\$0	N/A
Natural Gas	\$9,121	\$154.59	\$0.15	\$0	N/A
Oil	\$0	\$0.00	\$0.00	\$0	N/A
Water & Sewer	\$58,000	\$983.05	\$0.97	\$0	N/A
Subtotal: Utilities	\$120,121	\$2,035.95	\$2.00	\$0	N/A
Replacement Reserve	\$29,500	\$500.00	\$0.49	\$0	N/A
Operating Reserve	\$0	\$0.00	\$0.00	\$0	N/A
Real Estate Taxes	\$120,000	\$2,033.90	\$2.00	\$0	N/A
Other Taxes	\$0	\$0.00	\$0.00	\$0	N/A
Insurance	\$96,673	\$1,638.53	\$1.61	\$0	N/A
MIP	\$17,035	\$288.72	\$0.28	\$0	N/A
Other:	\$0	\$0.00	\$0.00	\$0	N/A
Subtotal: Taxes, Insurance	\$233,708	\$3,961.15	\$3.90	\$0	N/A
TOTAL EXPENSES	\$959,396	\$16,260.94	\$15.99	\$0	N/A

Development Cost Analysis

NOTE: Do not fill out this section. It is automatically filled in by program.

	Residential Total	Residential Per Unit	Residential Per S. F.	Commercial Total	Commercial Per S. F.
Acquisition: Land	\$5,138,747	\$87,097	\$85.65	\$0	N/A
Acquisition: Building	\$0	\$0	\$0.00	\$0	N/A
Acquisition Subtotal	\$5,138,747	\$87,097	\$85.65	\$0	N/A
Direct Construction Budget	\$4,978,600	\$84,383	\$82.98	\$0	N/A
Construction Contingency	\$497,860	\$8,438	\$8.30	\$0	N/A
Subtotal: Construction	\$5,476,460	\$92,821	\$91.27	\$0	N/A
General Development Costs:					
Architecture & Engineering	\$182,000	\$3,085	\$3.03	\$0	N/A
Survey and Permits	\$68,527	\$1,161	\$1.14	\$0	N/A
Clerk of the Works	\$42,062	\$713	\$0.70	\$0	N/A
Environmental Engineer	\$5,000	\$85	\$0.08	\$0	N/A
Bond Premium	\$0	\$0	\$0.00	\$0	N/A
Legal	\$50,000	\$847	\$0.83	\$0	N/A
Title and Recording	\$35,081	\$595	\$0.58	\$0	N/A
Accounting & Cost Certificat.	\$15,000	\$254	\$0.25	\$0	N/A
Marketing and Rent Up	\$0	\$0	\$0.00	\$0	N/A
Real Estate Taxes	\$0	\$0	\$0.00	\$0	N/A
Insurance	\$0	\$0	\$0.00	\$0	N/A
Relocation	\$0	\$0	\$0.00	\$0	N/A
Appraisal	\$20,000	\$339	\$0.33	\$0	N/A
Security	\$0	\$0	\$0.00	\$0	N/A
Construction Loan Interest	\$0	\$0	\$0.00	\$0	N/A
Inspecting Engineer	\$15,483	\$262	\$0.26	\$0	N/A
Fees to: Lender Legal	\$0	\$0	\$0.00	\$0	N/A
Fees to: Loan Fees	\$174,165	\$2,952	\$2.90	\$0	N/A
FF&E	\$0	\$0	\$0.00	\$0	N/A
Credit Enhancement Fees	\$0	\$0	\$0.00	\$0	N/A
Letter of Credit Fees	\$0	\$0	\$0.00	\$0	N/A
Other Financing Fees	\$0	\$0	\$0.00	\$0	N/A
Development Consultant	\$35,583	\$603	\$0.59	\$0	N/A
Other:	\$0	\$0	\$0.00	\$0	N/A
Other:	\$0	\$0	\$0.00	\$0	N/A
Soft Cost Contingency	\$64,290	\$1,090	\$1.07	\$0	N/A
Subtotal: Gen. Dev.	\$707,191	\$11,986	\$11.79	\$0	N/A
Subtotal: Acquis., Const., and Gen. Dev.	\$11,322,398	\$191,905	\$188.71	\$0	N/A
Capitalized Reserves	\$273,200	\$4,631	\$4.55	\$0	N/A
Developer Overhead	\$0	\$0	\$0.00	\$0	N/A
Developer Fee	\$0	\$0	\$0.00	\$0	N/A
Total Development Cost	\$11,595,598	\$196,536	\$193.26	\$0	N/A
Total Net* Development Cost	\$11,322,398	\$191,905	\$188.71	\$0	N/A

(*Does not include any capitalized reserves nor any developer's fees or overhead which are contributed or loaned to the project.)

ATTACHMENT 3 –
NON-CPA FUNDING

Newton Community Development Foundation, Inc.

Newton Community Preservation Act Application for Warren House

April 21, 2023

Summary of Non-CPA Funding Sources

NCDF's proposed Warren House Preservation and Rehabilitation Project is being financed utilizing a number of sources, in addition to the requested CPA funds, including the following:

SOURCE	AMOUNT	STATUS
First Mortgage (new)	\$6,830,000	Term Sheet
Newton AHT	\$1,900,000	Application Pending
Newton HOME	\$129,000	Application Pending
Owner Equity	\$636,598	Committed
TOTAL:	\$9,495,598	

NCDF is also exploring the availability of ARPA funding from the City of Newton and MA Department of Energy Resources grants for energy efficiency upgrades to existing buildings, in this case the window replacement project.

ATTACHMENT 4 –
GALE ASSOCIATES, INC.
EVALUATION AND ESTIMATED BUDGETS



Gale Associates, Inc.
163 Libbey Parkway | Weymouth, MA 02189
P 781.335.6465 F 781.335.6467
www.galeassociates.com

December 9, 2022

Ms. Jeanne M. Strickland
Newton Community Development Foundation, Inc.
425 Watertown Street, Suite#205
Newton, MA 02458

RE: Revised Estimated Budgets
Window Replacement, Masonry Repairs and Associated Work
Newton Community Development Foundation, Inc.'s
Warren House
1600 Washington Street
Newton, MA
Previous Gale JN's 835240, 837400
Gale P09927

Dear Ms. Strickland:

As requested, Gale Associates, Inc. (Gale) has reviewed our most recent evaluation reports related to the exterior building envelope components at the Warren House. The documents associated with these evaluations are as follows:

- Gale's June 7, 2019 Warren House Exterior Wall, Door and Window Evaluation Report
- Gale's December 21, 2020 Emergency Sounding Field Observation Report Number 01
- Gale's December 22, 2020 Emergency Sounding Field Observation Report Number 02

These documents are attached for your reference.

It is Gale's understanding that the Newton Community Development Foundation, Inc. (NCDF) has not performed the masonry renovations or window replacement that had been outlined in the June 2019 report, or completed repairs beyond the immediate stabilization of the stone elements that were referenced in the December 2020 reports.

NCDF is in the process of soliciting funds for this project and has inquired if the 2019 budget values are still valid with a typical escalation factor. Based on our understanding of the current economic world climate, significant material and labor increases have been experienced and are still impacting the 2022-2023 construction projects. These impacts have been associated with the Covid 19 labor and transportation issues, plastic/material shortages due to extreme temperature changes and manufacturer supply chain issues, the Russia-Ukraine war, and other events. As such, the values that were presented in the 2019 report are considered low and should not be used for sensitive budgeting.

SINCE 1964

Connecticut | Florida | Maine | Maryland | Massachusetts | New Hampshire | Virginia

Ms. Jeanne M. Strickland
 Revised Estimated Budgets
 Window Replacement, Masonry Repairs and Associated Work
 Newton Community Development Foundation, Inc.'s
 Warren House
 1600 Washington Street; Newton, MA
 December 9, 2022
 Page 2



Using current public sector unit pricing, the comparison between the original 2019 report and current 2022/2023 construction values are estimated to be as follows:

	2019 Report Value	2022/2023 Estimate	Approximate Increase Amount
Masonry Repairs	\$371,800	\$465,500	\$93,700
Window Replacement	\$1,910,900	\$3,023,300	\$1,112,400
Sub-total:	\$2,282,700	\$3,488,800	\$1,206,100
Recommended 20% Contingency Budget:	\$2,739,300	\$4,186,600	\$1,447,300

Again, these values are estimates based on the 2019 visual observations, and modifications of the 2019 construction takeoffs to provide a rough order of magnitude estimate. They should not be used for sensitive budgets. Similar to the 2019 report, the current estimate values have been broken down on a per-elevation basis in the event phasing may be required. An economy of scale would be achieved and a potential cost reducing provided should the entire project be bid at one time. More refined cost estimates can be provided should NCDF wish to proceed with the design phase.

We trust this information serves your needs at this time. Should you have any questions or comments, please do not hesitate to contact me at this office.

Sincerely,

Gale Associates, Inc.

Christopher Musorofiti, RRC
 Senior Associate

CM:pmw

Attachments:

I:\P09927\01 Evaluation\letters\preliminary budget estimate\previous reports

I:\P09927\01 Evaluation\letters\preliminary budget estimate\P09927 NCDF Warren House preliminary budget estimate 2022 1209.docx

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019 R01 December 9, 2022
Job No.: 835240/P09927 Prepared/Checked by: krc/cm	File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Window Replacement and Masonry Repairs	Construction Estimate	
	Base Bid	20% Contingency
Masonry Repairs		
North Elevation	\$120,800	\$145,000
East Elevation	\$75,500	\$90,600
South Elevation	\$254,800	\$305,800
West Elevation	\$14,400	\$17,300
Masonry Repairs Subtotal	<u>\$465,500</u>	<u>\$558,600</u>
Remove and Replace Apartment Unit Windows		
North Elevation	\$835,200	\$1,002,300
East Elevation	\$584,400	\$701,300
South Elevation	\$558,400	\$670,100
West	\$1,045,300	\$1,254,400
Window Replacement Subtotal	<u>\$3,023,300</u>	<u>\$3,628,000</u>

<u>Estimated Construction Cost</u>	<u>\$3,488,800</u>
---	---------------------------

Gale recommends that an additional twenty (20) percent contingency be budgeted for in the event that unforeseen conditions are encountered during the construction phase. Therefore the recommended budge is valued at
\$4,186,600

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019 R01 December 9, 2022
Job No.: 835240/P09927	Prepared/Checked by: krc/cm File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
Newton Community Development Foundation
Newton, MA

Window Replacement and Masonry Repairs	Construction Estimate			
Item Description	Number	Unit	Unit Cost	Total
WINDOWS - NORTH ELEVATION				
Dumpster	1	each	\$1,150.00	\$575
Temporary Protection	1	lump sum	\$2,000.00	\$2,000
Aerial Lift	3	weeks	\$1,600.00	\$4,800
Wood Blocking at Sills	366	board feet	\$2.65	\$970
PVC Stool (1.25"x8")	366	linear feet	\$9.50	\$3,477
PVC Apron (1/2"x2")	366	linear feet	\$5.25	\$1,922
Aluminum Windows	3,406	square feet	\$120.00	\$408,720
Exterior Perimeter Sealant	2,190	linear feet	\$22.00	\$48,180
Interior Perimeter Sealant	2,190	linear feet	\$8.00	\$17,520
Operable Units	68	unit	\$220.00	\$14,960
Perimeter Trim Window Flashing	1,706	linear feet	\$10.25	\$17,487
Sheet Metal Sill Flashing	380	linear feet	\$18.00	\$6,840
Remove/Replace Interior Shades	70	unit	\$265.00	\$18,550
Miscellaneous Interior Frame Touch-Ups	1	lump sum	\$3,100.00	\$3,100
Cleaning	1	lump sum	\$2,200.00	\$2,200
Landscaping	1	lump sum	\$2,750.00	\$2,750
Interior Gypsum Repairs	1	lump sum	\$3,250.00	\$3,250
Scrape, Prime and Paint Lintels	366	linear feet	\$23.00	\$8,418
Door Exterior Perimeter Sealant	40	linear feet	\$21.00	\$840
Door Weatherstripping	1	unit	\$210.00	\$210
Materials Sub Total:			\$566,768	
General Conditions (12%)			\$68,012	
Mobilization Costs/crane (10%)			\$63,478	
Bonds and Insurance (4%)			\$27,930	
Overhead and Profit (15%)			\$108,928	
SUBTOTAL FOR NORTH ELEVATION WINDOW REPLACEMENT WORK:			\$835,117	
Cost per SF			\$245.19	
Total Window Area	3,406	Square Feet		

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019 R01 December 9, 2022
Job No.: 835240/P09927	Prepared/Checked by: krc/cm
File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate	

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Window Replacement and Masonry Repairs	Construction Estimate				
	Item Description	Quantity		Material	
		Number	Unit	Unit Cost	Total
WINDOWS - EAST ELEVATION					
Dumpster	1	each	\$1,150.00	\$575	
Temporary Protection	1	lump sum	\$2,000.00	\$2,000	
Aerial Lift	3	weeks	\$1,600.00	\$4,800	
Wood Blocking at Sills	276	board feet	\$2.65	\$731	
PVC Stool (1.25"x8")	276	linear feet	\$9.50	\$2,622	
PVC Apron (1/2"x2")	276	linear feet	\$5.25	\$1,449	
Aluminum Windows	2,283	square feet	\$120.00	\$273,960	
Exterior Perimeter Sealant	1,375	linear feet	\$22.00	\$30,250	
Interior Perimeter Sealant	1,375	linear feet	\$8.00	\$11,000	
Operable Units	56	unit	\$220.00	\$12,320	
Perimeter Trim Window Flashing	990	linear feet	\$10.25	\$10,148	
Sheet Metal Sill Flashing	276	linear feet	\$18.00	\$4,968	
Remove/Replace Interior Shades	62	unit	\$265.00	\$16,430	
Micellaneous Interior Frame Touch-Ups	1	lump sum	\$3,100.00	\$3,100	
Cleaning	1	lump sum	\$2,200.00	\$2,200	
Landscaping	1	lump sum	\$2,750.00	\$2,750	
Interior Gypsum Repairs	1	lump sum	\$3,250.00	\$3,250	
Scrape, Prime and Paint Lintels	276	linear feet	\$23.00	\$6,348	
Door Exterior Perimeter Sealant	325	linear feet	\$21.00	\$6,825	
Door Weatherstripping	4	unit	\$210.00	\$840	
Materials Sub Total:				\$396,566	
General Conditions (12%)				\$47,588	
Mobilization Costs/crane (10%)				\$44,415	
Bonds and Insurance (4%)				\$19,543	
Overhead and Profit (15%)				\$76,217	
SUBTOTAL FOR EAST ELEVATION WINDOW REPLACEMENT WORK:				\$584,329	
Cost per SF				\$255.95	
Total Window Area	2,283			Square Feet	

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Project: Exterior Wall, Door, and Window Evaluation			Date: June 4, 2019 R01 December 9, 2022	
Job No.: 835240/P09927	Prepared/Checked by: krc/cm		File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate	
EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Exterior Wall, Door, and Window Evaluation at the Warren House Newton Community Development Foundation Newton, MA				
Window Replacement and Masonry Repairs		Construction Estimate		
Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
WINDOWS - SOUTH ELEVATION				
Dumpster	1	each	\$1,150.00	\$1,150
Temporary Protection	1	lump sum	\$2,000.00	\$2,000
Aerial Lift	3	weeks	\$1,600.00	\$4,800
Wood Blocking at Sills	248	board feet	\$2.65	\$657
PVC Stool (1.25"x8")	248	linear feet	\$9.50	\$2,356
PVC Apron (1/2"x2")	248	linear feet	\$5.25	\$1,302
Aluminum Windows	2,150	square feet	\$120.00	\$258,000
Exterior Perimeter Sealant	1,405	linear feet	\$22.00	\$30,910
Interior Perimeter Sealant	1,405	linear feet	\$8.00	\$11,240
Operable Units	50	unit	\$220.00	\$11,000
Perimeter Trim Window Flashing	1,135	linear feet	\$10.25	\$11,634
Sheet Metal Sill Flashing	250	linear feet	\$18.00	\$4,500
Remove/Replace Interior Shades	52	unit	\$265.00	\$13,780
Micellaneous Interior Frame Touch-Ups	1	lump sum	\$3,100.00	\$3,100
Cleaning	1	lump sum	\$2,200.00	\$2,200
Landscaping	1	lump sum	\$2,750.00	\$2,750
Interior Gypsum Repairs	1	lump sum	\$3,250.00	\$3,250
Scrape, Prime and Paint Lintels	248	linear feet	\$23.00	\$5,704
Door Exterior Perimeter Sealant	300	linear feet	\$21.00	\$6,300
Door Weatherstripping	11	unit	\$210.00	\$2,310
Materials Sub Total:			\$378,943	
General Conditions (12%)			\$45,473	
Mobilization Costs/crane (10%)			\$42,442	
Bonds and Insurance (4%)			\$18,674	
Overhead and Profit (15%)			\$72,830	
SUBTOTAL FOR SOUTH ELEVATION WINDOW REPLACEMENT WORK:			\$558,362	
Cost per SF			\$259.70	
Total Window Area	2,150		Square Feet	
<p>These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.</p>				

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019 R01 December 9, 2022
Job No.: 835240/P09927	Prepared/Checked by: krc/cm File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
Newton Community Development Foundation
Newton, MA

Window Replacement and Masonry Repairs	Construction Estimate				
	Item Description	Quantity		Material	
		Number	Unit	Unit Cost	Total
WINDOWS - WEST ELEVATION					
Dumpster	1	each	\$1,150.00	\$1,150	
Temporary Protection	1	lump sum	\$2,000.00	\$2,000	
Aerial Lift	3	weeks	\$1,600.00	\$4,800	
Wood Blocking at Sills	250	board feet	\$2.65	\$663	
PVC Stool (1.25"x8")	250	linear feet	\$9.50	\$2,375	
PVC Apron (1/2"x2")	250	linear feet	\$5.25	\$1,313	
Aluminum Windows	2,160	square feet	\$120.00	\$259,200	
Exterior Perimeter Sealant	1,310	linear feet	\$22.00	\$28,820	
Interior Perimeter Sealant	1,310	linear feet	\$8.00	\$10,480	
Operable Units	67	unit	\$220.00	\$14,740	
Fixed Units	17	Unit	\$10.25	\$174	
Perimeter Trim Window Flashing	1,000	linear feet	\$18.00	\$18,000	
Sheet Metal Sill Flashing	311	linear feet	\$265.00	\$82,415	
Remove/Replace Interior Shades	63	unit	\$3,100.00	\$195,300	
Micellaneous Interior Frame Touch-Ups	1	lump sum	\$2,200.00	\$2,200	
Cleaning	1	lump sum	\$2,750.00	\$2,750	
Landscaping	1	lump sum	\$3,250.00	\$3,250	
Interior Gypsum Repairs	1	lump sum	\$23.00	\$23	
Scrape, Prime and Paint Lintels	250	linear feet	\$21.00	\$5,250	
Door Exterior Perimeter Sealant	350	linear feet	\$210.00	\$73,500	
Door Weatherstripping	5	unit	\$200.00	\$1,000	
Materials Sub Total:				\$709,402	
General Conditions (12%)				\$85,128	
Mobilization Costs/crane (10%)				\$79,453	
Bonds and Insurance (4%)				\$34,959	
Overhead and Profit (15%)				\$136,341	
SUBTOTAL FOR WEST ELEVATION WINDOW REPLACEMENT WORK:				\$1,045,284	
Cost per SF				\$483.93	
Total Window Area	2,160			Square Feet	

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019 R01 December 9, 2022
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EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
Newton Community Development Foundation
Newton, MA

Window Replacement and Masonry Repairs	Construction Estimate			
Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
MASONRY - NORTH ELEVATION				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,500.00	\$750
Aerial Lift	3	weeks	\$1,750.00	\$5,250
Remove and replace cracked/spalled brick	50	each	\$75.00	\$3,750
Remove deteriorated mortar joints and re-point	1,205	linear feet	\$40.00	\$48,200
Rebuild displaced masonry	50	square feet	\$125.00	\$6,250
Install new through-wall flashing & replace steel lintel	0	linear feet	\$350.00	\$0
Repair spalled concrete at foundation	0	square feet	\$145.00	\$0
Remove and replace sealant	0	linear feet	\$28.00	\$0
Repair concrete cracks	40	linear feet	\$220.00	\$8,800
Repair spalled concrete	1	square feet	\$180.00	\$180
Clean masonry	438	square feet	\$3.75	\$1,643
New Item				
Stone Replacement - estimated	5	units	\$1,200.00	\$6,000
Materials Sub Total:			\$81,923	
General Conditions (12%)			\$9,831	
Mobilization Costs/crane (10%)			\$9,175	
Bonds and Insurance (4%)			\$4,037	
Overhead and Profit (15%)			\$15,745	
SUBTOTAL FOR NORTH ELEVATION MASONRY WORK:			\$120,711	

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EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Project: Exterior Wall, Door, and Window Evaluation			Date: June 4, 2019 R01 December 9, 2022	
Job No.: 835240/P09927	Prepared/Checked by: krc/cm		File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate	
EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Exterior Wall, Door, and Window Evaluation at the Warren House Newton Community Development Foundation Newton, MA				
Window Replacement and Masonry Repairs			Construction Estimate	
Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
MASONRY - EAST ELEVATION				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,500.00	\$750
Aerial Lift	3	weeks	\$1,750.00	\$5,250
Remove and replace cracked/spalled brick	10	each	\$75.00	\$750
Remove deteriorated mortar joints and re-point	985	linear feet	\$40.00	\$39,400
Rebuild displaced masonry	0	square feet	\$125.00	\$0
Install new through-wall flashing & replace steel lintel	0	linear feet	\$350.00	\$0
Repair spalled concrete at foundation	0	square feet	\$145.00	\$0
Remove and replace sealant	0	linear feet	\$28.00	\$0
Repair concrete cracks	0	linear feet	\$220.00	\$0
Repair spalled concrete	0	square feet	\$180.00	\$0
Clean masonry	420	square feet	\$3.75	\$1,575
New Item				
Stone Replacement - estimated	2	units	\$1,200.00	\$2,400
Materials Sub Total:			\$51,225	
General Conditions (12%)			\$6,147	
Mobilization Costs/crane (10%)			\$5,737	
Bonds and Insurance (4%)			\$2,524	
Overhead and Profit (15%)			\$9,845	
SUBTOTAL FOR EAST ELEVATION MASONRY WORK:			\$75,479	
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EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019 R01 December 9, 2022
Job No.: 835240/P09927	Prepared/Checked by: krc/cm File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Window Replacement and Masonry Repairs		Construction Estimate		
Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
MASONRY - ELEVATION 3				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,500.00	\$750
Aerial Lift	3	weeks	\$1,750.00	\$5,250
Remove and replace cracked/spalled brick	125	each	\$75.00	\$9,375
Remove deteriorated mortar joints and re-point	3,050	linear feet	\$40.00	\$122,000
Rebuild displaced masonry	175	square feet	\$125.00	\$21,875
Install new through-wall flashing & replace steel lintel	0	linear feet	\$350.00	\$0
Repair spalled concrete at foundation	0	square feet	\$145.00	\$0
Remove and replace sealant	0	linear feet	\$28.00	\$0
Repair concrete cracks	30	linear feet	\$220.00	\$6,600
Repair spalled concrete	1	square feet	\$180.00	\$180
Clean masonry	265	square feet	\$3.75	\$994
New Item				
Stone Replacement - estimated	4	units	\$1,200.00	\$4,800
Materials Sub Total:			\$172,924	
General Conditions (12%)			\$20,751	
Mobilization Costs/crane (10%)			\$19,367	
Bonds and Insurance (4%)			\$8,522	
Overhead and Profit (15%)			\$33,235	
TOTAL FOR MASONRY WORK:			\$254,798	

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EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019 R01 December 9, 2022
Job No.: 835240/P09927	Prepared/Checked by: krc/cm
File Name: I:\P09927\01 Evaluation\Letter\Preliminary estimate	

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Window Replacement and Masonry Repairs	Construction Estimate			
Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
MASONRY - ELEVATION 4				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,500.00	\$750
Aerial Lift	3	weeks	\$1,750.00	\$5,250
Remove and replace cracked/spalled brick	5	each	\$75.00	\$375
Remove deteriorated mortar joints and re-point	5	linear feet	\$40.00	\$200
Rebuild displaced masonry	0	square feet	\$125.00	\$0
Install new through-wall flashing & replace steel lintel	0	linear feet	\$350.00	\$0
Repair spalled concrete at foundation	0	square feet	\$145.00	\$0
Remove and replace sealant	0	linear feet	\$28.00	\$0
Repair concrete cracks	5	linear feet	\$220.00	\$1,100
Repair spalled concrete	0	square feet	\$180.00	\$0
Clean masonry	0	square feet	\$3.75	\$0
New Item				
Stone Replacement - estimated	2	units	\$1,200.00	\$2,400
Materials Sub Total:			\$11,175	
General Conditions (12%)			\$1,341	
Mobilization Costs/crane (10%)			\$1,252	
Bonds and Insurance (4%)			\$551	
Overhead and Profit (15%)			\$2,148	
TOTAL FOR MASONRY WORK:			\$14,318	

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June 7, 2019

Ms. Jeanne M. Strickland
Newton Community Development Foundation, Inc.
425 Watertown Street Suite 205
Newton, MA 02458

Re: Warren House Exterior Wall, Door, and Window Evaluation
1600 Washington Street
Newton, MA 02465
Gale JN 835240

Dear Ms. Strickland:

In accordance with your request, Gale Associates, Inc. (Gale) performed a limited visual evaluation of the existing exterior walls, doors, and windows at the Warren House. Representatives from Gale visited the site on May 14, 2019 to conduct this limited visual evaluation. As requested, evaluation of the masonry at the plan east and plan west elevations was limited to a cursory review. Access to the roof and building interiors was coordinated and provided by Newton Community Development Foundation (NCDF).

Gale's scope of services performed on site included the following:

- Perform a visual evaluation of the exterior walls, door and window systems from the interior as well as from the grade level utilizing high-powered binoculars. The intent of the visual observations is to identify the typical existing conditions to generalize the budget estimates.

Background Information

The Warren House is a three (3) story multi-wythe brick masonry building with precast stone elements and wood windows located on Washington Street in Newton, Massachusetts. The original building was constructed circa 1927 as a junior high school. A renovation was completed in 1992 to convert the building from a school to an apartment building with approximately fifty-nine (59) units and a pre-school on the first floor. At this time, it appears the pre-school facility is no longer in use.

Gale has previously provided design and consulting services at the Warren House for roof replacement, balcony waterproofing, cast stone, isolated windows and select masonry renovations over the past ten (10) years.

In conjunction with the evaluation, Gale discussed with the facilities staff if there have been any active leaks in the building. The facilities staff indicated that there are no active leaks within the building at this time.

Existing Conditions and Observations

The following is a summary of Gale's observations of each system of the building façade:

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Warren House Exterior Wall, Doors, and Window Evaluation
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Windows:

1. The windows appear to be single hung or fixed wood windows varying in size and shape. The majority of the windows have an approximate one-inch (1") thick insulated glazing unit within their sashes. The windows generally appear to be in fair to poor condition.
2. The windows have a weight and pulley balance system. The weight and pulley system at accessible units appeared to be in poor condition, and window operation is difficult. NCDF personnel indicated that some tenants are unable to operate their window units.
3. The chains to operate the blinds in isolated locations appears to be too high to reach.
4. There appears to be tape, weatherstripping, or a polyethylene sheeting installed at isolated interior window perimeters which makes it difficult to operate the unit.
5. At isolated window units it appears that some of the sashes have been painted shut.
6. Window units were observed to typically have sash locks.
7. Retrofitted limit stops were observed to be installed in the former pre-school facility. The lock appears fastened to the window jamb and a hole drilled into the operable sash.
8. Deteriorated exterior wood trim was generally observed throughout the building.
9. Exterior window perimeter sealant generally appears to be in poor condition with widespread cohesive and adhesive failures.



Photo 1 – Overall interior view of typical window units.



Photo 2 – Overall exterior view of typical window units.

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Photo 3 – View of tape installed between the sashes at an isolated window unit.



Photo 4 – View of the retrofitted limit stop installed at a window unit in the former pre-school.

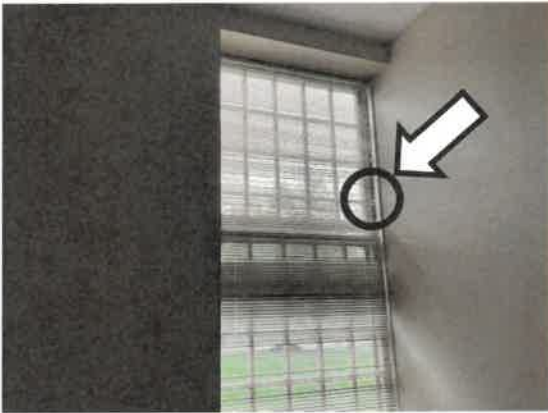


Photo 5 – View of the blind chain unreachable from the ground.



Photo 6 – View of window sash painted shut.

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Photo 7 – View of deteriorated wood at an isolated window sill.



Photo 8 – View of failed perimeter sealant at an isolated window unit.

Doors:

1. The doors appear to vary in size and configuration. The doors appear to generally be in fair to good condition.
2. The doors appear to be heavy and are difficult to operate.
3. There appears to be deteriorated weatherstripping at isolated door perimeters.
4. Exterior door perimeter sealant generally appears to be in poor condition with widespread cohesive and adhesive failures.



Photo 1 – View of the main entrance doors.



Photo 2 – View of a typical unit entry door.

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Photo 3 – View of a typical common entry door.

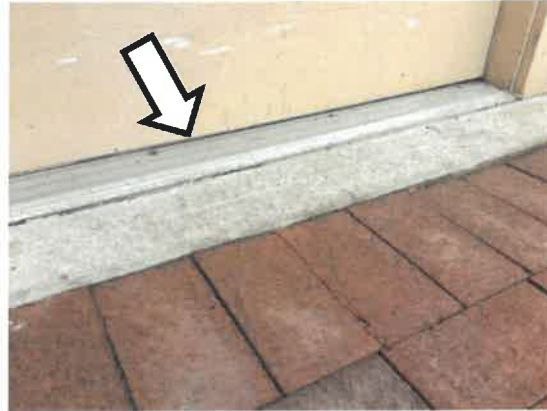


Photo 4 – Missing weatherstripping at an isolated door.

Masonry:

1. Overall the masonry appears to be in fair to good condition.
2. A combination of brick and precast stone elements are installed at the perimeter of the windows and doors. Various defects were observed in the masonry around the windows and doors.
3. On the rear elevation there are yellow glazed brick masonry at a door arch. The brick masonry appears to be in fair condition with multiple spalled brick within this area.
4. At select locations windows were observed to have steel lintels that supports the bonded jack brick masonry arch above the window openings. The bonded jack brick masonry arch has copper flashing above which generally appears to be in fair condition.
5. Isolated cracked and spalled brick units were observed throughout the building.
6. Deteriorated mortar joints were observed at isolated locations throughout the building.
7. Brick masonry is bulging or step cracked at isolated locations.
8. Isolated spalled and cracked precast stone elements were observed throughout the building.
9. Isolated locations of efflorescence and/or vegetative staining were identified.

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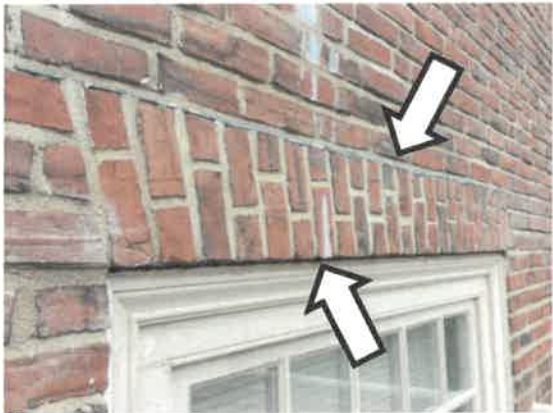


Photo 1 – View of steel lintel and copper flashing at an isolated window head.

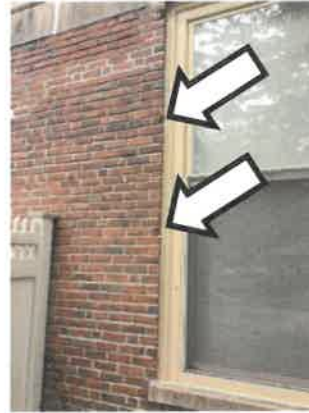


Photo 2 – View of spalled brick at a window jamb.



Photo 3 – View of deteriorated mortar.



Photo 4 – View of a cracked precast concrete sill.



Photo 5 – View of cracked precast stone.



Photo 6 – View of a step crack adjacent to a window.

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Photo 7 – View of vegetative staining below window units.

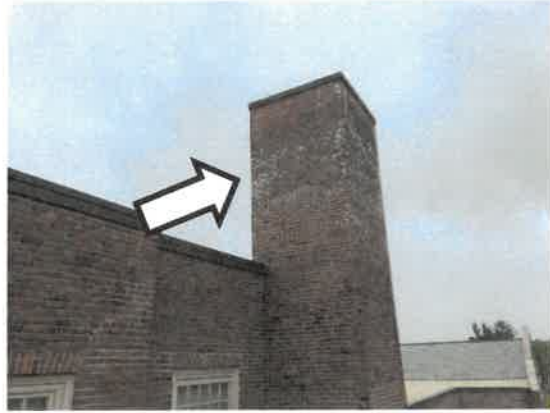


Photo 8 – View of efflorescence on the chimney.



Photo 9 – View of the yellow glazed brick masonry.



Photo 10 – Spalled yellow glazed brick masonry.

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Miscellaneous Items:

1. Damaged wood trim at entrance canopy.



Photo 1 – View of damaged wood trim at entrance canopy.

Summary / Recommendations

The intent of the visual evaluation of the existing masonry and window units was to provide NCDF with a rough order of magnitude cost estimate that can be used for future planning. It is Gale's opinion that the existing windows should be considered for removal and replacement. Additionally, at a minimum, defects within the brick masonry and precast stone should be repaired at locations adjacent to window replacement.

The proposed recommended scope of work will potentially improve window and door operability, tenant comfort, and the overall performance of the exterior building envelope. This work generally includes the following:

- Remove and replace all existing windows with new aluminum windows to match the same profile as the existing.
- Install new throughwall flashing at window heads at select locations and sheet metal pan flashings at window sills.
- Install wood blocking at window sill locations.
- Remove existing oriented strand board stools and aprons and install new PVC stools and aprons at window interiors.
- Install interior and exterior sealant around window perimeters to create a weathertight condition.
- Replace blinds as required to install new window units.
- Repair all interior finishes that are damaged during window installation.
- Remove and replace deteriorated weatherstripping around door perimeters.
- Remove and replace failed exterior sealant around door perimeters.



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 Newton Community Development Foundation
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- Remove and replace cracked and spalled brick masonry units around window perimeters.
- Repair/patch spalled cast stone locations around window perimeters.
- Rout and seal crack locations within the precast stone elements around window perimeters.
- Repoint deteriorated brick masonry mortar joints around window perimeters.

Preliminary Cost Estimate

The construction budget presented below is preliminary in nature and intended only to provide a rough order of magnitude. It should not be used for sensitive budgeting or funding allocation. The values are based on past operations at the Warren House and on current public sector unit pricing of similar construction projects using open shops but have not included all details or design considerations at this time. Further field evaluation and design services would be required to provide a more refined cost estimate.

The unit costs presented herein typically take into account general contractor costs associated with the work such as:

- Mobilization
- Crane usage
- Dumpsters
- General oversight of the project
- Bonds and insurance
- Overhead and profit

Gale recommends that a twenty percent (20%) contingency be carried at this time in the event that unforeseen conditions are encountered during construction, such as but not limited to, deteriorated interior finishes, additional masonry repairs due to window removal and replacement, deteriorated structural framing components. Gale’s recommended budget, which is intended to be conservative at this time.

Warren House:

▪ Masonry Repairs:	\$371,800.00
▪ Window Replacement/Door Repairs:	\$1,910,900.00
▪ Sub-total:	\$2,282,700.00
Recommend Construction Budget (with 20% Contingency):	\$2,739,300.00

Again, please be reminded that these budgets are preliminary and should not be used for sensitive budgeting. Additionally, please be aware that these values do not include soft costs associated with working for NCDF, client oversight of the project, engineering costs, or interior renovations beyond those mentioned herein. More refined cost estimates can be provided after additional field work and preliminary design should NCDF wish to proceed to the next phase.



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We trust this information suits your needs at this time. Please do not hesitate to contact us if you require additional information regarding this matter.

Best regards,

GALE ASSOCIATES, INC.

Katherine Ciaramitaro/dmk

Katherine Ciaramitaro
Staff Engineer
Building Enclosure Design and Consulting (BEDC)

KRC/dmk
Attachment

cc: Gale Team (CM, KAK, KRC)

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EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE		
Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019	
Job No.: 835240	Prepared/Checked by: krc/cm	File Name: I:\835240\01 Evaluation\Preliminary Cost Estimate
EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE		
Exterior Wall, Door, and Window Evaluation at the Warren House Newton Community Development Foundation Newton, MA		
Window Replacement and Masonry Repairs	Construction Estimate	
	Base Bid	20% Contingency
Masonry Repairs		
North Elevation	\$93,600	\$112,400
East Elevation	\$60,200	\$72,300
South Elevation	\$210,300	\$252,400
West Elevation	\$7,700	\$9,300
Masonry Repairs Subtotal	\$371,800	\$446,200
Remove and Replace Apartment Unit Windows		
North Elevation	\$625,400	\$750,500
East Elevation	\$437,400	\$524,900
South Elevation	\$419,100	\$503,000
West	\$429,000	\$514,800
Window Replacement Subtotal	\$1,910,900	\$2,293,100
Estimated Construction Cost	\$2,282,700	
Gale recommends that an additional twenty (20) percent contingency be budgeted for in the event that unforeseen conditions are encountered during the construction phase. Therefore the recommended budget is valued at		
	\$2,739,300	
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EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

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EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Window Replacement and Masonry Repairs		Construction Estimate		
Item Description	Number	Unit	Unit Cost	Total
WINDOWS - NORTH ELEVATION				
Dumpster	1	each	\$1,100.00	\$550
Temporary Protection	1	lump sum	\$1,000.00	\$1,000
Aerial Lift	3	weeks	\$1,000.00	\$3,000
Wood Blocking at Sills	366	board feet	\$1.00	\$366
PVC Stool (1.25"x8")	366	linear feet	\$7.00	\$2,562
PVC Apron (1/2"x2")	366	linear feet	\$4.00	\$1,464
Aluminum Windows	3,406	square feet	\$90.00	\$306,540
Exterior Perimeter Sealant	2,190	linear feet	\$16.00	\$35,040
Interior Perimeter Sealant	2,190	linear feet	\$7.00	\$15,330
Operable Units	68	unit	\$200.00	\$13,600
Perimeter Trim Window Flashing	1,706	linear feet	\$8.50	\$14,501
Sheet Metal Sill Flashing	380	linear feet	\$16.50	\$6,270
Remove/Replace Interior Shades	70	unit	\$155.00	\$10,850
Miscellaneous Interior Frame Touch-Ups	1	lump sum	\$2,500.00	\$2,500
Cleaning	1	lump sum	\$2,500.00	\$2,500
Landscaping	1	lump sum	\$2,500.00	\$2,500
Interior Gypsum Repairs	1	lump sum	\$2,500.00	\$2,500
Scrape, Prime and Paint Lintels	366	linear feet	\$18.00	\$6,588
Door Exterior Perimeter Sealant	40	linear feet	\$16.00	\$640
Door Weatherstripping	1	unit	\$200.00	\$200
Materials Sub Total:			\$428,501	
General Conditions (12%)			\$51,420	
Mobilization Costs/crane (10%)			\$47,992	
Bonds and Insurance (3%)			\$15,837	
Overhead and Profit (15%)			\$81,563	
SUBTOTAL FOR NORTH ELEVATION WINDOW REPLACEMENT WORK:			\$625,313	
Cost per SF			\$183.59	
Total Window Area	3,406	Square Feet		

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019
Job No.: 835240	Prepared/Checked by: krc/cm
File Name: I:\835240\01 Evaluation\Preliminary Cost Estimate	

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Window Replacement and Masonry Repairs	Construction Estimate
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Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total

WINDOWS - EAST ELEVATION				
Dumpster	1	each	\$1,100.00	\$550
Temporary Protection	1	lump sum	\$1,000.00	\$1,000
Aerial Lift	3	weeks	\$1,000.00	\$3,000
Wood Blocking at Sills	276	board feet	\$1.00	\$276
PVC Stool (1.25"x8")	276	linear feet	\$7.00	\$1,932
PVC Apron (1/2"x2")	276	linear feet	\$4.00	\$1,104
Aluminum Windows	2,283	square feet	\$90.00	\$205,470
Exterior Perimeter Sealant	1,375	linear feet	\$16.00	\$22,000
Interior Perimeter Sealant	1,375	linear feet	\$7.00	\$9,625
Operable Units	56	unit	\$200.00	\$11,200
Perimeter Trim Window Flashing	990	linear feet	\$8.50	\$8,415
Sheet Metal Sill Flashing	276	linear feet	\$16.50	\$4,554
Remove/Replace Interior Shades	62	unit	\$155.00	\$9,610
Micellaneous Interior Frame Touch-Ups	1	lump sum	\$2,500.00	\$2,500
Cleaning	1	lump sum	\$2,500.00	\$2,500
Landscaping	1	lump sum	\$2,500.00	\$2,500
Interior Gypsum Repairs	1	lump sum	\$2,500.00	\$2,500
Scrape, Prime and Paint Lintels	276	linear feet	\$18.00	\$4,968
Door Exterior Perimeter Sealant	325	linear feet	\$16.00	\$5,200
Door Weatherstripping	4	unit	\$200.00	\$800

Materials Sub Total:	\$299,704
General Conditions (12%)	\$35,964
Mobilization Costs/crane (10%)	\$33,567
Bonds and Insurance (3%)	\$11,077
Overhead and Profit (15%)	\$57,047
SUBTOTAL FOR EAST ELEVATION WINDOW REPLACEMENT WORK:	\$437,359
Cost per SF	\$191.57

Total Window Area	2,283	Square Feet
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These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019
Job No.: 835240	Prepared/Checked by: krc/cm
File Name: I:\835240\01 Evaluation\Preliminary Cost Estimate	

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Item Description	Construction Estimate			
	Quantity		Material	
	Number	Unit	Unit Cost	Total
WINDOWS - SOUTH ELEVATION				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,000.00	\$1,000
Aerial Lift	3	weeks	\$1,000.00	\$3,000
Wood Blocking at Sills	248	board feet	\$1.00	\$248
PVC Stool (1.25"x8")	248	linear feet	\$7.00	\$1,736
PVC Apron (1/2"x2")	248	linear feet	\$4.00	\$992
Aluminum Windows	2,150	square feet	\$90.00	\$193,500
Exterior Perimeter Sealant	1,405	linear feet	\$16.00	\$22,480
Interior Perimeter Sealant	1,405	linear feet	\$7.00	\$9,835
Operable Units	50	unit	\$200.00	\$10,000
Perimeter Trim Window Flashing	1,135	linear feet	\$8.50	\$9,648
Sheet Metal Sill Flashing	250	linear feet	\$16.50	\$4,125
Remove/Replace Interior Shades	52	unit	\$155.00	\$8,060
Micellaneous Interior Frame Touch-Ups	1	lump sum	\$2,500.00	\$2,500
Cleaning	1	lump sum	\$2,500.00	\$2,500
Landscaping	1	lump sum	\$2,500.00	\$2,500
Interior Gypsum Repairs	1	lump sum	\$2,500.00	\$2,500
Scrape, Prime and Paint Lintels	248	linear feet	\$18.00	\$4,464
Door Exterior Perimeter Sealant	300	linear feet	\$16.00	\$4,800
Door Weatherstripping	11	unit	\$200.00	\$2,200
Materials Sub Total:			\$287,188	
General Conditions (12%)			\$34,463	
Mobilization Costs/crane (10%)			\$32,165	
Bonds and Insurance (3%)			\$10,614	
Overhead and Profit (15%)			\$54,664	
SUBTOTAL FOR SOUTH ELEVATION WINDOW REPLACEMENT WORK:			\$419,094	
Cost per SF			\$194.93	
Total Window Area	2,150	Square Feet		

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Project: Exterior Wall, Door, and Window Evaluation			Date: June 4, 2019	
Job No.: 835240	Prepared/Checked by: krc/cm		File Name: I:\835240\01 Evaluation\Preliminary Cost Estimate	
EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Exterior Wall, Door, and Window Evaluation at the Warren House Newton Community Development Foundation Newton, MA				
Window Replacement and Masonry Repairs		Construction Estimate		
Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
WINDOWS - WEST ELEVATION				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,000.00	\$1,000
Aerial Lift	3	weeks	\$1,000.00	\$3,000
Wood Blocking at Sills	250	board feet	\$1.00	\$250
PVC Stool (1.25"x8")	250	linear feet	\$7.00	\$1,750
PVC Apron (1/2"x2")	250	linear feet	\$4.00	\$1,000
Aluminum Windows	2,160	square feet	\$90.00	\$194,400
Exterior Perimeter Sealant	1,310	linear feet	\$16.00	\$20,960
Interior Perimeter Sealant	1,310	linear feet	\$7.00	\$9,170
Operable Units	67	unit	\$200.00	\$13,400
Fixed Units	17	Unit	\$200.00	\$3,400
Perimeter Trim Window Flashing	1,000	linear feet	\$8.50	\$8,500
Sheet Metal Sill Flashing	311	linear feet	\$16.50	\$5,132
Remove/Replace Interior Shades	63	unit	\$155.00	\$9,765
Micellaneous Interior Frame Touch-Ups	1	lump sum	\$2,500.00	\$2,500
Cleaning	1	lump sum	\$2,500.00	\$2,500
Landscaping	1	lump sum	\$2,500.00	\$2,500
Interior Gypsum Repairs	1	lump sum	\$2,500.00	\$2,500
Scrape, Prime and Paint Lintels	250	linear feet	\$18.00	\$4,500
Door Exterior Perimeter Sealant	350	linear feet	\$16.00	\$5,600
Door Weatherstripping	5	unit	\$200.00	\$1,000
Materials Sub Total:			\$293,927	
General Conditions (12%)			\$35,271	
Mobilization Costs/crane (10%)			\$32,920	
Bonds and Insurance (3%)			\$10,864	
Overhead and Profit (15%)			\$55,947	
SUBTOTAL FOR WEST ELEVATION WINDOW REPLACEMENT WORK:			\$428,928	
Cost per SF			\$198.58	
Total Window Area	2,160		Square Feet	
<p>These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.</p>				

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation	Date: June 4, 2019
Job No.: 835240	Prepared/Checked by: krc/cm
File Name: I:\835240\01 Evaluation\Preliminary Cost Estimate	

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
Newton Community Development Foundation
Newton, MA

Window Replacement and Masonry Repairs

Construction Estimate

Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
MASONRY - EAST ELEVATION				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,000.00	\$500
Aerial Lift	3	weeks	\$1,000.00	\$3,000
Remove and replace cracked/spalled brick	10	each	\$70.00	\$700
Remove deteriorated mortar joints and re-point	985	linear feet	\$35.00	\$34,475
Rebuild displaced masonry	0	square feet	\$100.00	\$0
Install new through-wall flashing & replace steel lintel	0	linear feet	\$275.00	\$0
Repair spalled concrete at foundation	0	square feet	\$120.00	\$0
Remove and replace sealant	0	linear feet	\$25.00	\$0
Repair concrete cracks	0	linear feet	\$180.00	\$0
Repair spalled concrete	0	square feet	\$120.00	\$0
Clean masonry	420	square feet	\$3.50	\$1,470
Materials Sub Total:			\$41,245	
General Conditions (12%)			\$4,949	
Mobilization Costs/crane (10%)			\$4,619	
Bonds and Insurance (3%)			\$1,524	
Overhead and Profit (15%)			\$7,851	
SUBTOTAL FOR EAST ELEVATION MASONRY WORK:			\$60,189	

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Project: Exterior Wall, Door, and Window Evaluation Date: June 4, 2019
 Job No.: 835240 Prepared/Checked by: krc/cm File Name: I:\835240\01 Evaluation\Preliminary Cost Estimate

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE

Exterior Wall, Door, and Window Evaluation at the Warren House
 Newton Community Development Foundation
 Newton, MA

Window Replacement and Masonry Repairs Construction Estimate

Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
MASONRY - ELEVATION 3				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,000.00	\$500
Aerial Lift	3	weeks	\$1,000.00	\$3,000
Remove and replace cracked/spalled brick	125	each	\$70.00	\$8,750
Remove deteriorated mortar joints and re-point	3,050	linear feet	\$35.00	\$106,750
Rebuild displaced masonry	175	square feet	\$100.00	\$17,500
Install new through-wall flashing & replace steel lintel	0	linear feet	\$275.00	\$0
Repair spalled concrete at foundation	0	square feet	\$120.00	\$0
Remove and replace sealant	0	linear feet	\$25.00	\$0
Repair concrete cracks	30	linear feet	\$180.00	\$5,400
Repair spalled concrete	1	square feet	\$120.00	\$120
Clean masonry	265	square feet	\$3.50	\$928
Materials Sub Total:			\$144,048	
General Conditions (12%)			\$17,286	
Mobilization Costs/crane (10%)			\$16,133	
Bonds and Insurance (3%)			\$5,324	
Overhead and Profit (15%)			\$27,419	
TOTAL FOR MASONRY WORK:			\$210,209	

These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.

EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Project: Exterior Wall, Door, and Window Evaluation			Date: June 4, 2019	
Job No.: 835240		Prepared/Checked by: krc/cm	File Name: I:\835240\01 Evaluation\ Preliminary Cost Estimat	
EXTERIOR WALL, DOOR, AND WINDOW EVALUATION AT THE WARREN HOUSE				
Exterior Wall, Door, and Window Evaluation at the Warren House Newton Community Development Foundation Newton, MA				
Window Replacement and Masonry Repairs			Construction Estimate	
Item Description	Quantity		Material	
	Number	Unit	Unit Cost	Total
MASONRY - ELEVATION 4				
Dumpster	1	each	\$1,100.00	\$1,100
Temporary Protection	1	lump sum	\$1,000.00	\$500
Aerial Lift	3	weeks	\$1,000.00	\$3,000
Remove and replace cracked/spalled brick	5	each	\$70.00	\$350
Remove deteriorated mortar joints and re-point	5	linear feet	\$35.00	\$175
Rebuild displaced masonry	0	square feet	\$100.00	\$0
Install new through-wall flashing & replace steel lintel	0	linear feet	\$275.00	\$0
Repair spalled concrete at foundation	0	square feet	\$120.00	\$0
Remove and replace sealant	0	linear feet	\$25.00	\$0
Repair concrete cracks	5	linear feet	\$180.00	\$900
Repair spalled concrete	0	square feet	\$120.00	\$0
Clean masonry	0	square feet	\$3.50	\$0
Materials Sub Total:			\$6,025	
General Conditions (12%)			\$723	
Mobilization Costs/crane (10%)			\$675	
Bonds and Insurance (3%)			\$223	
Overhead and Profit (15%)			\$1,147	
TOTAL FOR MASONRY WORK:			\$7,645	
<p>These estimates have been generated by various sources and may not reflect the actual conditions at the time of construction. All unit cost pricing presented in these estimates are based on average public sector bid amounts. Gale does not recommend using these numbers for sensitive budgeting.</p>				



PROJECT NAME: Warren House Emergency Sounding Newton Community Development Foundation 1600 Washington Street, Newton, MA		GALE JN: 837400	ARRIVE: 7:30 A.M.	DEPART: 2:45 P.M.
CLIENT: Newton Community Development Foundation 425 Watertown Street, Suite 205 Newton, MA	DAY OF WEEK:	WEATHER: Cloudy		
	Monday	WIND: Light		
		TEMP (MIN): 30 °F	TEMP (MAX): 32 °F	

DESIGN/CONSTRUCTION TEAM MEMBERS:				
NAME:	COMPANY & TITLE:	MEANS OF CONTACT:	REGARDING:	CC ON REPORT:
Mr. Scott Palmerino	Colonial Masonry, Inc. (Colonial)	Via Phone	Emergency Sounding	
Mr. Ken Bachand	Colonial	In Person	Emergency Sounding	
Ms. Kimberly Kilroy	Gale Associates, Inc. (Gale)	Via Phone	Emergency Sounding	X
Mr. Christopher Musorofiti	Gale	Via Phone	Emergency Sounding	X
Ms. Melissa Lemmerhirt	Gale	Author	Emergency Sounding	X

OBSERVATIONS/COMMENTS: *The following items are based upon a brief and limited observation of select work items and locations at the time of the visit. Not all locations and work were observed. This report documents the items observed, including general items noted below as well as those noted in the attached plans and photographs. Recommendations are provided for consideration by the owner.*

- Gale arrived on site with representatives of Colonial Masonry (Colonial) for emergency sounding and temporary repairs at the cast stone copings and other ornamental stone elements at the Warren House.
- Prior to Gale's arrival, NCDF informed Gale that the bottom of the front east decorative cast stone coping fell to grade. Gale and Colonial removed additional delaminated decorative cast stone coping from the area. Due to the extents of delaminated cast stone that was removed, Gale recommends that the area below the front east decorative cast stone coping is to be roped off from pedestrian access until more permanent repairs can be performed. Refer to the attached site plan for specific location and extents of area to be roped off.
- While on site Gale and Colonial sounded the cast stone copings along the front and rear elevations of the Warren House. Gale identified locations of cracks, delaminated and spalled cast stone and locations of temporary repair performed by Colonial to reduce the potential for moisture intrusion. The sounding of concrete was performed with a hammer to located delaminated concrete and areas of loose delamination was removed.
- Gale observed delaminated cast stone at the bottom of the copings at the east and west gable roofs, which was removed until sound concrete was reached by Colonial. Gale observed multiple cracks along the decorative cast stone copings that were temporarily sealed with sealant to limit water infiltration into the cast stone copings.
- Refer to the photographs herein for documentation of the work performed and additional activities observed on this day.

Please Note: The above issues were noted by Gale on the date/time and at the location indicated. Gale bears no liability for further observations of the issues identified. This list is not all inclusive and represents only those issues actually observed and noted by Gale personnel while on-site. Gale was asked to observe the temporary repairs and the absence of notations with respect to any other temporary repair elements neither creates any liability on Gale's part.

PHOTOGRAPHIC DOCUMENTATION



Photo 1: Overall view of the front elevation of the Warren House where emergency sounding of the cast stone copings was performed.



Photo 2: View of the front east decorative cast stone coping, where the bottom of the cast stone fell prior to Gale's arrival.



Photo 3: View of multiple cracks along the decorative cast stone coping, where water infiltration can occur.



Photo 4: View of a full height crack in the decorative cast stone coping at the front east elevation. Colonial applied sealant to the cracks to limit water infiltration that were identified by Gale.

PHOTOGRAPHIC DOCUMENTATION



Photo 5: View of a spall at the base of the decorative cast stone coping at the rear west elevation.



Photo 6: View of a temporary repair of a full height crack in a decorative cast stone coping at the front west elevation. The temporary repair consisted of the application of sealant along the crack.

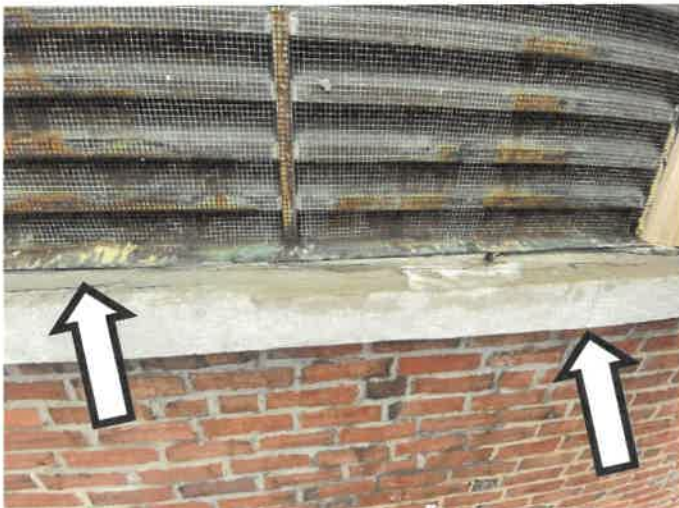


Photo 7: View of multiple cracks and delamination at the sill stone beneath a louver vent at the rear east gable roof. It appeared that a previous repair failed at the sill. Refer to Photo 8 for a closer view of the cracks and delaminated stone at the sill.



Photo 8: Closer view of the cracks and delaminated stone along the sill at the rear east gable roof. Gale observed a gap between the bottom of the vent and the stone sill, which is a location for water infiltration.

PHOTOGRAPHIC DOCUMENTATION



Photo 9: View of a spall in the bottom of a decorative cast stone coping at the rear east elevation where Gale observed the removal of loose delaminated cast stone. Refer to Photo 10 for side elevation view of the cast stone spall.



Photo 10: Side elevation view of the spall where Gale observed loose delaminated cast stone. The gable roof gutter was observed to be behind the decorative cast stone coping.

Signed: *Melissa S. Lemmerhirt/lad*

Melissa S. Lemmerhirt
Staff Engineer

MSL/KAK/lad

CC: Jeanne Strickland – NCDF
Dina Troiani - NCDF
Kimberly Kilroy - Gale
Christopher Musorofiti – Gale
Melissa Lemmerhirt - Gale

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- LEGEND**
- L-shaped area where concrete was removed by OSHA
 - Temporary window repairs applied to this area by OSHA
 - Cracked Glass
 - Spalled Glass
 - Debris on window frame or sash

Case #01031402
Warren House Emergency Sealing
7/21/2010
MBC
Pg. 4 of 7

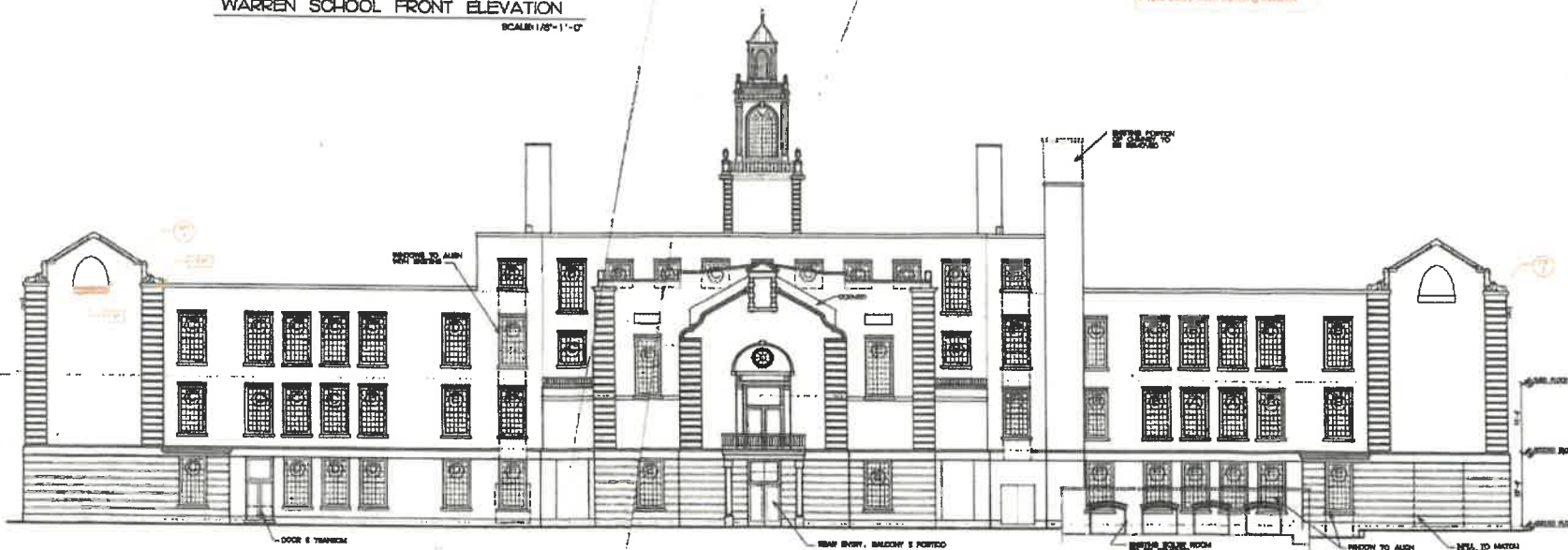
Notes: 28 inspectors indicated and documented

WINDOW SURVEY

- Window in relatively good condition. Majority of glass in place, sash and frame in need of repainting and painting. Sash cords in disrepair.
- Window in fair condition. Some glazing broken or missing, sash and frame in need of complete repainting and painting. Frame has some dry rot and cracking. Window sash in structurally fair condition.
- Window in poor condition. Frame is split or cracked, sash has some dry rot. Majority of glazing missing or broken.
- Window in poor condition. Frame is split or cracked, sash has some dry rot. Majority of glazing missing or broken. Some muntins or sash members missing. Window beyond repair, replacement necessary.
- Original window gone, replacement proposed.
- New window opening.



WARREN SCHOOL FRONT ELEVATION
SCALE: 1/8"=1'-0"



WARREN SCHOOL REAR ELEVATION
SCALE: 1/8"=1'-0"



WARREN HOUSE

1600 WASHINGTON STREET
NEWTON, MASSACHUSETTS

NOTTIE FINEGOLD & ALEXANDER
ARCHITECTS

C/BI CHALOFF/BARNES INC
STRUCTURAL ENGINEERS

ENVIRONMENTAL DESIGN ENGINEERS

MECHANICAL ENGINEERS

DI ORIO INC.
ELECTRICAL ENGINEERS

CSA LANDSCAPE ARCHITECTS
LANDSCAPE ARCHITECTS

LEA GROUP INC
CIVIL ENGINEERS

KEYWORDS

DATE: October 13, 2009
SCALE:

FRONT & REAR ELEVATIONS

WINDOW SURVEY



PROJECT NAME: Warren House Emergency Sounding Newton Community Development Foundation 1600 Washington Street Newton, MA		GALE JN: 837400	ARRIVE: 7:30 A.M.	DEPART: 11:30 A.M.
CLIENT: Newton Community Development Foundation 425 Watertown Street, Suite 205 Newton, MA	DAY OF WEEK:	WEATHER: Sunny		
	Tuesday	WIND: Light		
		TEMP (MIN): 35 °F	TEMP (MAX): 40 °F	

DESIGN/CONSTRUCTION TEAM MEMBERS:				
NAME:	COMPANY & TITLE:	MEANS OF CONTACT:	REGARDING:	CC ON REPORT:
Mr. Scott Palmerino	Colonial Masonry, Inc. (Colonial)	Via Phone	Emergency Sounding	
Mr. Ken Banchand	Colonial	In Person	Emergency Sounding	
Ms. Kimberly Kilroy	Gale Associates, Inc. (Gale)	Via Phone	Emergency Sounding	X
Mr. Christopher Musorofiti	Gale	Via Phone	Emergency Sounding	X
Ms. Melissa Lemmerhirt	Gale	Author	Concrete Sounding	X

OBSERVATIONS/COMMENTS: *The following items are based upon a brief and limited observation of select work items and locations at the time of the visit. Not all locations and work were observed. This report documents the items observed, including general items noted below as well as those noted in the attached plans and photographs. Recommendations are provided for consideration by the owner.*

- Gale arrived on site with representatives of Colonial Masonry (Colonial) to continue emergency sounding and temporary repairs of the cast stone copings and other ornamental stone elements at limited locations at the Warren House.
- While on site Gale and Colonial completed sounding of the concrete copings along the front and rear elevations of the Warren House. Areas of delaminated concrete were removed prior to performing temporary repairs.
- Gale observed multiple cracks and spalls along the decorative stone above the rear entrance to the Warren House. The cracks appeared to have been previously repaired via route and seal, but the previous repair appear to have failed. Gale observed that the mortar joints along the decorative stones appeared to have deteriorated, creating a potential path for water infiltration. The temporary repairs performed by Colonial at this location consisted of temporary sealant and mortar repairs. The repairs performed by Colonial are temporary and long-term repairs are still required.
- On the rear east gable roof, Gale observed multiple cracks and delaminated stone at the stone sill beneath the louver penetration. Colonial removed the loose delaminated stone was prior to performing temporary repairs. Colonial temporary filled the area of removed delaminated stone with repair mortar. The repairs performed by Colonial are temporary, and long-term repairs are required. Gale observed a gap between the stone sill and the vent, providing a potential path for water infiltration. The gap was temporarily sealed with sealant to limit water infiltration.
- At various locations around the louver penetrations located at the gable roofs, Gale observed deteriorated wood where water infiltration could occur.



6. Refer to the photographs herein for documentation of the work performed and additional activities observed on this day.

Please Note: The above issues were noted by Gale on the date/time and at the location indicated. Gale bears no liability for further observations of the issues identified. This list is not all inclusive and represents only those issues observed and noted by Gale personnel while on site. Gale was asked to observe the temporary repairs, and the absence of notations with respect to any other temporary repair elements neither creates any liability on Gale's part.

PHOTOGRAPHIC DOCUMENTATION



Photo 1: Overall partial view of the rear elevation of the Warren House where emergency sounding, and temporary repairs of the cast stone copings and other ornamental stone were performed.

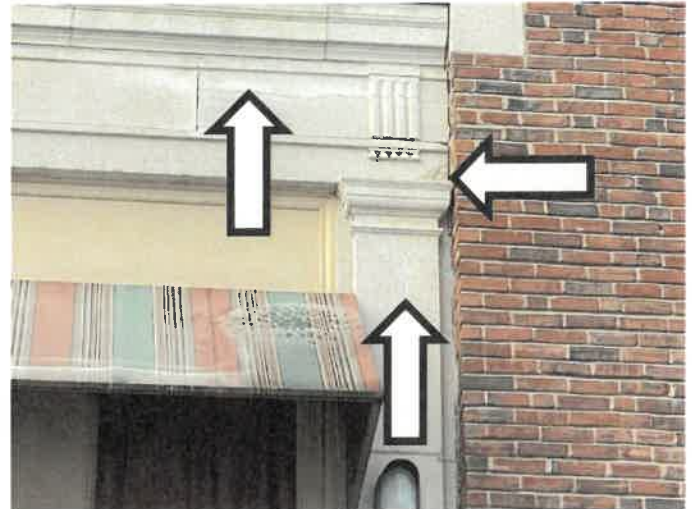


Photo 2: View of the rear decorative stone where Gale observed spalls, cracks, and deteriorated mortar joints above the rear entrance.

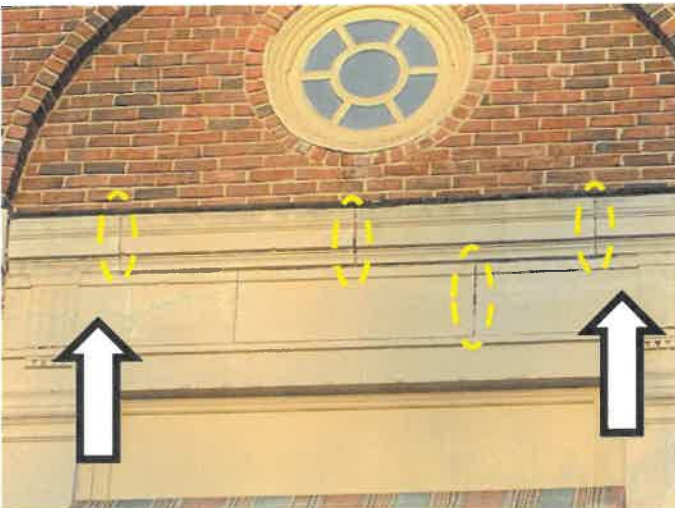


Photo 3: View of two (2) cracks that appear to have been previously repaired via rout and seal and deteriorated mortar joints above the rear entrance. The arrows indicated the observed previously repaired cracks and the circles indicated the deteriorated mortar joint that was observed by Gale.

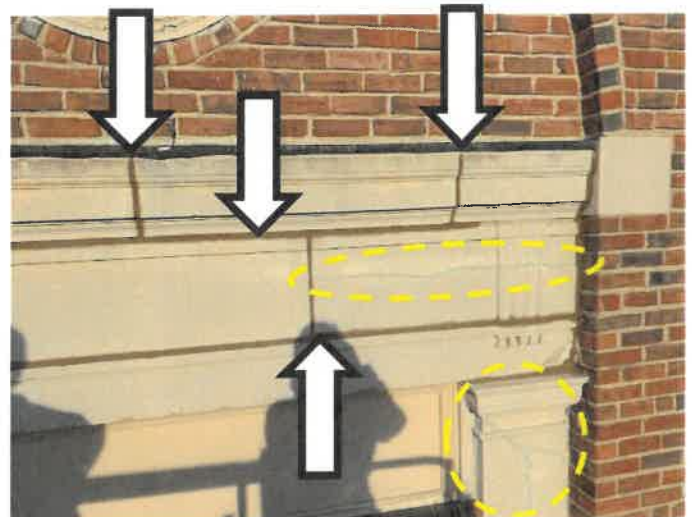


Photo 4: View of the temporary mortar joint repair and rout and seal crack repair performed by Colonial at the decorative stones above the rear entrance. The repairs performed by Colonial are temporary and long-term pairs are still required. The arrows indicate the locations of repointed mortar joints and the circles indicate the locations of rout and seal cracks.

PHOTOGRAPHIC DOCUMENTATION

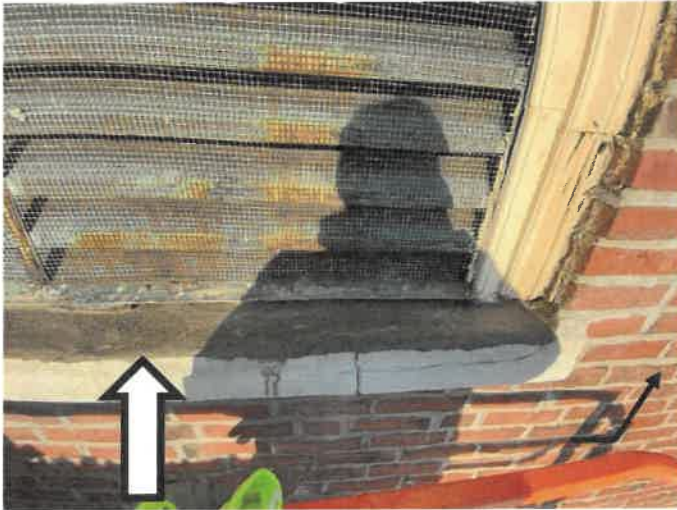


Photo 5: View of a temporary sill repair where Colonial applied repair mortar at the location where delaminated stone was observed by Gale. Colonial removed the loose delaminated stone prior to placing temporary repair mortar.



Photo 6: View of a temporary sealant repair of a crack in the stone beneath the louver penetration. Gale observed a gap between the vent and the stone sill, which is a path for water infiltration. The gap between the vent and the stone sill was sealed with sealant to limit water infiltration.



Photo 7: View of split wood frame around the louver at the rear east gable roof. Gale observed deteriorated wood framing at isolated locations around the louver penetrations.



Photo 8: View of temporary crack repair at the rear east decorative cast stone coping. The temporary repair included the application of sealant along the cracks to limit water infiltration.



Signed: *Melissa S. Lemmerhirt/lad*

Melissa S. Lemmerhirt
Staff Engineer

MSL/KAK/lad

CC: Jeanne Strickland – NCDF
Dina Troiani - NCDF
Kimberly Kilroy – Gale
Melissa Lemmerhirt - Gale
Christopher Musorofiti – Gale

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- LEGEND**
- 1. Look indicated cornice was replaced by Cornice
 - 2. Windows approximately appear fair
 - 3. Windows in poor condition
 - 4. Windows in fair condition
 - 5. Windows in good condition
 - 6. Windows in excellent condition
 - 7. Windows in need of repair
 - 8. Windows in need of replacement
 - 9. Windows in need of replacement
 - 10. Windows in need of replacement
 - 11. Windows in need of replacement
 - 12. Windows in need of replacement
 - 13. Windows in need of replacement
 - 14. Windows in need of replacement
 - 15. Windows in need of replacement
 - 16. Windows in need of replacement
 - 17. Windows in need of replacement
 - 18. Windows in need of replacement
 - 19. Windows in need of replacement
 - 20. Windows in need of replacement
 - 21. Windows in need of replacement
 - 22. Windows in need of replacement
 - 23. Windows in need of replacement
 - 24. Windows in need of replacement
 - 25. Windows in need of replacement
 - 26. Windows in need of replacement
 - 27. Windows in need of replacement
 - 28. Windows in need of replacement
 - 29. Windows in need of replacement
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Date: 04/11/00
 Warren House Emergency Sounding
 12/27/2000
 N.E.L.
 pg. 1 of 1

Note: All windows indicated are subject to change

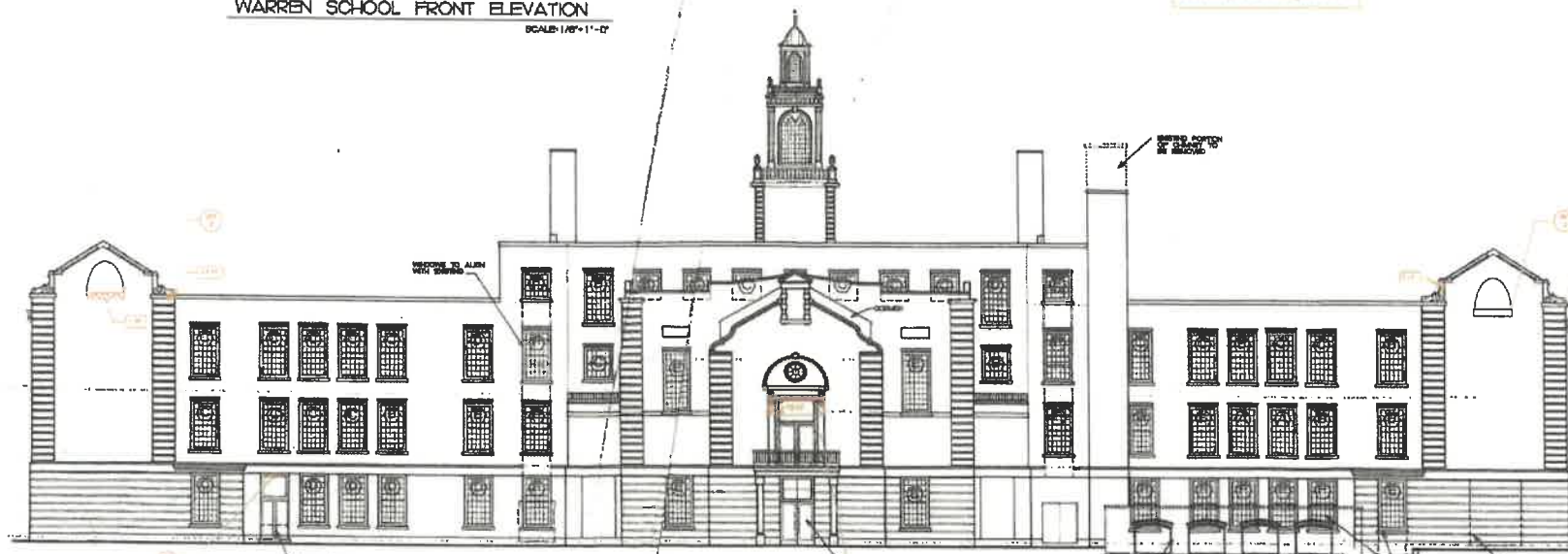
WINDOW SURVEY

- ⊕ Window in relatively good condition. Majority of glass in place, sash and frame in need of repainting and painting. Sash cords in disrepair.
- ⊖ Window in fair condition. Some glazing broken or missing, sash and frame in need of complete repainting and painting. Frame has some dry rot and cracking. Window sash in structurally fair condition.
- ⊙ Window in poor condition. Frame is split or cracked, sash has some dry rot. Majority of glazing missing or broken.
- ⊗ Window in poor condition. Frame is split or cracked, sash has some dry rot. Majority of glazing missing or broken. Some muntins or sash members missing. Window beyond repair, replacement necessary.
- ⊕ Original window gone, replacement proposed.
- ⊖ New window opening.



WARREN SCHOOL FRONT ELEVATION
 SCALE: 1/8" = 1'-0"

Note: Area to be removed is approximately 12 feet away from building exterior.



WARREN SCHOOL REAR ELEVATION
 SCALE: 1/8" = 1'-0"



WARREN HOUSE

1800 WASHINGTON STREET
 NEWTON, MASSACHUSETTS

NOTTER FINEGOLD & ALEXANDER ARCHITECTS

C/BI CHALOFF BARNES INC STRUCTURAL ENGINEERS

ENVIRONMENTAL DESIGN ENGINEERS MECHANICAL ENGINEERS

DI GRID INC. ELECTRICAL ENGINEERS

CBA LANDSCAPE ARCHITECTS LANDSCAPE ARCHITECTS

LEA GROUP INC. CIVIL ENGINEERS

REVISIONS

DATE: October 15, 1999
 SCALE:

FRONT & REAR ELEVATIONS

WINDOW SURVEY

ATTACHMENT 5 –
INTENDED PERFORMANCE SPECIFICATIONS /
SUMMARY OF WORK



Gale Associates, Inc.
300 LedgeWood Place | Suite 300 | Rockland, MA 02370
P 781.335.6465 F 781.335.6467

April 12, 2023

Ms. Jeanne M. Strickland / Executive Director
Newton Community Development Foundation, Inc.
425 Watertown Street, Suite #205
Newton, MA 02458

RE: Window Replacement and Masonry Repairs
At the Newton Community Development Foundation, Inc.
Warren House
1600 Washington Street
Newton, MA
Gale JN 841460

Dear Ms. Strickland:

As requested, please accept this correspondence as a draft version of the intended performance specifications for the window replacement at the Warren House. Please be reminded that as of the date of this correspondence, Gale Associates, Inc. (Gale) has just started the initial field work to confirm the conditions of the windows and building configuration.

It is the intent of the project to remove and replace the windows with new aluminum, energy efficient windows to match the same historic profile as the existing wood windows. New through wall flashing will be installed at window heads at select locations and sheet metal pan flashing will be installed at windowsills. The panning system that “surrounds” the unit will match the aesthetic similarities of the current window perimeter by using custom extrusions to simulate the existing brick molds on the exterior of the building. Upon removal of the existing window sashes, the original wood pockets will be partially opened/cored to fill the openings with insulation.

Again, Gale is just initiating the evaluation/design phase for this project. However, below are the preliminary performance specifications that are anticipated to be used as a baseline for the design documents. Some modifications may be required as a review of the Massachusetts State Building Code and the National Park Service requirements are further reviewed. The anticipated specifications sections will read as follows:

PART 2 - MATERIALS

2.1 METAL WINDOWS AND ENTRANCES - GENERAL

- A. Standards: Except as otherwise indicated, requirements for aluminum window terminology and standards of performance, and fabrication workmanship are those specified and recommended in the most current version of AAMA

SINCE 1964

Connecticut | Florida | Maine | Maryland | Massachusetts | New Hampshire | Virginia



WDMA/CSA 101/I.S. 2/A440, and applicable general recommendations published by AAMA and ANSI.

- B. All vertical mullions, window frames, clips and securements shall be certified by the manufacturer to meet a 45 psf allowable stress design in accordance with the 9th Edition Massachusetts State Building Code, AAMA WDMA/CSA 101/I.S. 2/A440 and as required by the window manufacturer. Steel reinforcing of the aluminum frames may be required to meet the required design wind load. Certification of anchorage to all substrates shall also be provided. Certification shall be provided by a Registered Engineer.
- C. Performance and Testing: Except as otherwise indicated, comply with air infiltration tests, water resistance tests, and applicable load tests specified in AAMA WDMA/CSA 101/I.S. 2/A440 for type and classification of window units required in each case.
- D. All samples submitted for testing shall be full size per AAMA requirements. Reduced size test results will not be accepted.
- E. Testing: Where manufacturer's standard window units comply with requirements and have been tested in accordance with specified tests, provide certification by manufacturer showing compliance with such tests.
 - 1. Test reports shall be not more than four (4) years old.
 - 2. Sample submitted for tests shall be of manufacturer's standard construction and shall have been tested in accordance with ASTM 283-83. The sequence of tests shall be optional between manufacturer and the testing laboratory except that in all cases, the air infiltration test shall be performed before the water resistance test.
 - 3. All window and entrance systems shall meet or exceed the following performance requirements:
- F. Specific Performance Requirements: Architectural window (AW) fixed and projected windows shall conform to specified ANSI/AAMA standards and the following, whichever are the more stringent:
 - 1a. Air Infiltration Test (Fixed Units): The window shall be subjected to an air infiltration test in accordance with ASTM E 283. Air infiltration shall not exceed .10 cfm/ft² when tested at a pressure of 6.24 psf.
 - 1b. Air Infiltration Test (operable units): With the vent in a closed and locked position, the window shall be subjected to an air infiltration test in accordance with ASTM E 283 and AAMA/WDMA/CSA101/I.S.2/A440 or NFRC 400. Air infiltration shall not exceed .30 cfm/ft when tested at a pressure of 6.24 psf.
 - 2. Water Resistance Test: The glazed unit shall be mounted in its vertical position continuously supported around perimeter. The window unit



shall be subjected to a water resistance test in accordance with ASTM E 331 and E547. When a static pressure of 12 pounds per square foot has been stabilized, five gallons of water per square foot of window area shall be applied to the exterior face of the unit for a period of 15 minutes. No water shall pass the interior face of the window frame and there shall be no leakage as defined in the test method.

3. Condensation Resistance Factor: The window shall be tested in accordance with AAMA 1503.1 standards and test of thermal performance, and shall have a condensation resistance factor of no less than 52.
4. "U" Value Tests (Co-efficient of Heat Transfer): Thermal Transmittance of Conduction with a 15 mph perpendicular dynamic wind: 0.45 BTU/hr/ft²/F for operable, and 0.38 BTU/hr/ft²/F for fixed windows.

2.2 METAL WINDOWS

- A. Standard metal windows shall be factory wet glazed exterior and dry glazed interior with removal glass stops, extruded aluminum frame, fixed pane with operable units as detailed. All windows shall have self-contained structural thermal breaks, both in frame and in operable units.
- B. Basis of Design: Kawneer TR-9100U series for single hung windows, Kawneer TR-6800 series for sliding windows, and Kawneer NX-3800 series for fixed windows. Subject to the requirements of this Section, comparable products by one of the following manufacturers may be submitted for review and approval by the Owner:
 1. EFCO Corporation
 2. Wausau Window and Wall Systems
 3. Graham
 4. Or Approved Equal
- C. All sash, frame and sub-frame shall be extruded 6063-T5 alloy with a minimum wall thickness of .125" at the sill and a minimum frame depth of 4".
 1. Single hung units shall meet or exceed designation H-AW-50 and as designated by AAMA/NWWDA 101/I.S.2-97. Operable units shall be of the configurations shown on the Contract Drawings.
 2. Fixed units shall meet or exceed designation F-AW-50 as designated by AAMA/NWWDA 101/I.S.2-97.
- D. The windows shall be assembled in a secure and workmanlike manner to perform as herein specified. All frames shall be constructed with mortised and tendoned corners. Vertical frame members shall extend for the full window height without interruption. Vent frames shall have mitered corners with aluminum gusset blocks. Joints shall be hydraulically crimped and epoxy welded. All frame and vent joints shall be sealed with a non-hardening mastic to provide a

Ms. Jeanne M. Strickland / Executive Director
Window Replacement and Masonry Repairs
At the Newton Community Development Foundation, Inc.
Warren House
1600 Washington Street; Newton, MA
April 12, 2023
Page 4



watertight joint. Windows shall be equipped with baffled weeps as required to provide drainage for water.

- E. **Thermal Break:** The inside and outside faces of all sections shall be completely separated by a cast-in-place, high-strength, high-density polyurethane thermal break with a minimum tensile strength of 4000 psi and maximum thermal conductivity as noted in item 2.01.
- F. **Limit Stops:** There shall be an adjustable limit stop at all operable windows. Once window manufacturer has been approved, the General Contractor must present the limit stop operation to the Owner for review. The Owner shall approve a limit stop height prior to the Contractor ordering the windows.
- G. **Panning System:** The manufacturer's aluminum panning system shall be custom extruded to match the configuration of the existing brick molds of the building. Samples shall be provided and approved by the Owner and Engineer prior to manufacturing. Panning systems shall be finished with the same coatings as that of the window system.

We trust this information serves your needs at this time. Should you have any questions or comments, please do not hesitate to contact this office.

Sincerely,

Gale Associates, Inc.

A handwritten signature in blue ink, appearing to read "Chris", written over a light blue horizontal line.

Christopher Musorofiti, RRC
Senior Associate
Building Envelope Consulting and Design Group

CC: Ms. Chelsea G. Knott – Gale

CM:cm

I:\841460\01 Evaluation\letters\2023 0412 NCDF Warren House window specification.docx

SUMMARY OF WORK

SECTION 01 11 00

PART 1 - GENERAL

1.1 DESCRIPTION OF WORK

In general, the Contractor shall supply all labor, materials, equipment, staging, temporary protection, tools, and appliances necessary for the proper completion of the work in their respective Section(s), as required in the Specifications, in accordance with good construction practice, and as required by the materials manufacturer, as amended. The work under all Sections generally includes, but is not limited to, the following:

- A. Supply all necessary chutes, disposal facilities, transportation, and labor necessary to dispose of all demolished materials, dirt, and debris off-site in a legal dumping area. Each Contractor or Sub-Contractor shall obtain all permits necessary to transport and dispose of all materials, rubbish, and debris affected by their scope of work.
- B. Supply all shoring and protection necessary to protect the building areas, building systems, and landscape areas.
- C. Provide 6'-0" high temporary fencing around set-up and storage locations. Set-up and lay down areas must be within areas designated by the Owner. Set-up and lay down areas should be sufficient for all trades to have adequate area to store materials and equipment. Fencing must be secure and weighted or anchored to the ground.
- D. Due to the amount of work required at most window openings, temporary protection of the openings will be required. Temporary protection must be weather tight and secure at the end of each day. Due to the building being continuously occupied, temporary protection at window openings shall be left in place no longer than one (1) week maximum from the time of the existing window removal until the time of the installation of the new window.
- E. Provide and maintain temporary protection of all building components designated to remain or new components installed throughout the duration of construction.
- F. Remove existing wood and metal window systems, and all associated hardware at the designated openings, including all glass, fasteners, flashings, clips, jamb and mullion covers and window stools, down to the existing wood frame. Temporarily support and protect all interior fixtures to remain. Report all areas of structurally unsound or deteriorated wood blocking to remain to the Owner and the Engineer.

SUMMARY OF WORK

01 11 00-1

- G. Remove and replace damaged, cracked or spalled brick masonry units at locations and as indicated in the Contract Drawings. Perform additional repairs under the Unit Price scope of work.
- H. Remove and replace deteriorated cast stone units as indicated in the Contract Drawings
- I. Remove and replace deteriorated steel lintels and install new throughwall flashing components at designated locations and as indicted in the Contract Drawings.
- J. Cut and point designated brick masonry mortar joints at locations and as shown in the Contract Drawings. Perform additional repointing under the Unit Price scope of work.
- K. Clean all surfaces at locations and adjacent to where masonry renovations are performed.
- L. Remove and repair interior gypsum wall finishes as required for window and flashing installation as indicated in the Contract Drawings.
- M. Paint interior drywall finishes where damaged by the window installation as a result of the work to the limits of the adjacent wall.
- N. Install new PVC stools and trim at locations and as indicated in the Contract Drawings.
- O. Install modified bitumen flashing membrane at window rough openings as indicated in the Contract Drawings.
- P. Install new thermally improved, double glazed, replica aluminum windows at locations and as indicated in the Contract Drawings. Install heavy duty insect screens to all operable units.
- Q. Install new thermally improved, double glazed aluminum storefronts, door frames, door leafs and associated hardware components at locations indicated on the Contract Drawings. Provide storm doors over each resident entry door that is replaced.
- R. Temporarily remove, tag and store all existing window blinds. Reinstall after window and associated work has been completed.
- S. Install new interior gypsum wallboard finishes and paint the entire wall surface at work areas damaged from window installation. Shim out wall rough openings as required to provide uniform sight lines as indicated in the Contract Drawings.

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SUMMARY OF WORK
01 11 00-2

ATTACHMENT 6 –
HISTORIC PRESERVATION RESTRICTION
(with key features)

HISTORIC PRESERVATION RESTRICTION

THIS HISTORIC PRESERVATION RESTRICTION is made this 7th day of January, 2010, by and between **Warren House Associates Limited Partnership**, a Massachusetts limited partnership of which **Newton Community Development Foundation III, Inc.**, a Massachusetts corporation and **New Keen Corporation**, a Massachusetts corporation are the general partners and having an address c/o Newton Community Development Foundation, Inc. 425 Washington Street Suite 205 Newton, MA 02458 (hereinafter "WHA"); and the **City of Newton**, a Massachusetts municipal corporation (hereinafter "City") acting through the Newton Historical Commission (the "Commission"), with a mailing address of 1000 Commonwealth Avenue, Newton, Massachusetts 02459.

WITNESSETH:

WHEREAS, WHA is the owner of a building known and numbered 1600 Washington Street, in the City of Newton, Commonwealth of Massachusetts, (hereinafter the "Building") the deed to which is recorded in the land records of Middlesex County South District Registry of Deeds at Book 21653, page 407, located on land owned by the City of Newton (hereinafter the "Land") more particularly described in Exhibit A attached hereto and incorporated herein (the Building and the Land hereinafter collectively "the Property");

WHEREAS, the Property was a former Newton public junior high school which was subsequently converted into 59 rental housing units and a child care center;

WHEREAS, the Land is subject to a Ground Lease with a 65-year term expiring in 2056, and the Building is subject to a right of reversion such that at the expiration or earlier termination of said Ground Lease the Building will revert back to the City of Newton unless the Ground Lease is extended;

WHEREAS, a portion of the Building was demolished in about 1991 in connection with its conversion to housing and a child care center, and the remaining portion of the Building is a Georgian Revival style apartment building associated with the historical development of Newton through its use as a former Junior High School built in 1927, which is the subject of this Historic Preservation Restriction, (hereinafter "the Building");

WHEREAS, the Building stands as a highly significant example of Georgian Revival architecture, and is listed on the National Register of Historic Places and has been determined by the Newton Historical Commission to be

significant to the history and culture of the City of Newton, and which is further included in the Massachusetts State Register;

WHEREAS, WHA has requested and the City's Community Preservation Committee has recommended that funding in the amount of \$1,080,000 be granted to preserve and rehabilitate the roof and masonry on the Building;

WHEREAS, the City is authorized to accept historic preservation restrictions to protect property significant in national and state history and culture under the provisions of M.G.L. chapter 184, sections 26, 31, 32, and 33 (hereinafter "the Act");

WHEREAS, WHA and the City recognize the architectural, historic and cultural values and significance of the Building, and have the common purpose of conserving and preserving certain key features of the Building's exterior, which key features are set forth in Exhibit B attached hereto and made a part hereof (the "Key Features"). Baseline photographs of the Building and its Key Features will be maintained in the Archives of the Newton History Museum located at the Jackson Homestead, 527 Washington Street, Newton, Massachusetts, 02458. Photocopies of said baseline photographs are attached hereto as part of Exhibit B.

WHEREAS, the grant of a preservation restriction by WHA to the City on the Building will assist in preserving and maintaining the Building and its architectural, historic and cultural features for the benefit of the people of the City of Newton, Commonwealth of Massachusetts, and the United States of America; and

WHEREAS, to that end, WHA desires to grant to the City, and the City desires to accept, a preservation restriction on the exterior of the Building on the Property pursuant to the Act;

WHEREAS the parties intend this preservation restriction to be in force and effect for the longest period permissible by law, with the intention that it be coterminous with the expiration of the Ground Lease on December 19, 2056;

WHEREAS, the City of Newton is a "governmental body" as that term is defined in G.L. c. 184, §26; and

NOW, THEREFORE, in consideration of the above and the mutual covenants, terms, conditions, and restrictions contained herein, and pursuant to M.G.L. chapter 184, sections 26, 31, 32, and 33, WHA does hereby voluntarily grant and convey unto the City this preservation restriction (hereinafter "the

Restriction") in gross for the term set forth herein over the exterior of the Building on the Property.

PURPOSE

1. **Purpose.** It is the Purpose of this Restriction to assure the continued architectural and historical integrity of the exterior Key Features of the Building, and to prevent any change to the exterior of the Building that will significantly impair or interfere with the Building's Key Features.

2. WHA'S COVENANTS

2.1 **WHA's Covenants: Covenant to Maintain.** WHA agrees at all times to maintain the exterior of the Building in sound structural condition and good state of repair in accordance with the terms of this paragraph. It is WHA's intent that the exterior of the Building shall be maintained in a physical appearance and composition that is as close to its current appearance and composition as is reasonably possible. WHA's obligation to maintain shall, subject to the casualty provisions of paragraphs 7 and 8 require replacement, repair, and reconstruction by WHA whenever necessary to preserve the exterior of the Building in sound structural condition and a good state of repair. Also subject to the casualty provisions of paragraphs 7 and 8, this obligation to maintain shall require replacement, rebuilding, repair, and reconstruction of the Building whenever necessary in accordance with *The Secretary of the Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring and Reconstructing Historic Buildings* (36 C.F.R. 67 and 68), as these may be amended from time to time (hereinafter "the Secretary's Standards").

2.2 WHA's Covenants: Prohibited Activities.

WHA shall not demolish, remove, or raze the Building or any part thereof (by affirmative action or through neglect or failure to repair and maintain) except as provided in paragraphs 7 and 8.

3. WHA'S CONDITIONAL RIGHTS

3.1 **Conditional Rights Requiring Approval by the City.** Without the prior express written approval of the City, which approval may not be unreasonably withheld but which may be subject to such reasonable conditions as the City in its discretion may determine, WHA shall not make any changes to the exterior Key Features of the Building, including the alteration, partial removal, construction, remodeling, or other physical or structural change to the exterior and any change in material or color and the footprint, size, mass, ridge line and roof lines of the Building. Activities by WHA to maintain the exterior of the Building which are not intended to change the exterior appearance of the Building and which are intended to be performed in accordance with provisions of section 2.1 shall not require the prior approval of the City.

3.2 Archaeological Activities. The conduct of archaeological activities, including without limitation survey, excavation, and artifact retrieval, may occur only following the submission of an archaeological field investigation plan prepared by WHA and approved in writing by the City and the State Archaeologist of the Massachusetts Historical Commission (Massachusetts General Laws, chapter 9, section 27C, 950 C.M.R. 70.00).

3.3 Review of WHA's Requests for Approval. WHA shall submit to the City for the City's approval of those conditional rights set out at paragraph 3.1 one copy of information (including plans, specifications and designs), identifying the proposed activity with reasonable specificity. In connection therewith, WHA shall also submit to the City a timetable for the proposed activity sufficient to permit the City to monitor such activity. Within forty-five (45) days of the City's receipt of any plan or written request for approval hereunder, the City shall certify in writing that (a) it approves the plan or request, or (b) it disapproves the plan or request as submitted, in which case the City shall provide WHA with written suggestions for modification or a written explanation for the City's disapproval. Any failure by the City to act within forty-five (45) days of receipt of WHA's submission or resubmission of plans or requests shall be deemed to constitute approval by the City of the plan or request as submitted and to permit WHA to undertake the proposed activity in accordance with the plan or request submitted.

4. Standards for Review. In exercising any authority created by the Restriction to inspect the Property; to review any construction, alteration, repair or maintenance; or to review casualty damage or to reconstruct or approve reconstruction of the Building following casualty damage, the City shall apply the Secretary's Standards.

5. Public Access. This Restriction does not require public access.

6. WHA's RESERVED RIGHTS

WHA's Reserved Rights Not Requiring Further Approval by the City. Subject to the provisions of paragraphs 2.1, 2.2, and 3.1, the following rights, uses, and activities of or by WHA on, over, or under the Property are permitted by this Restriction and by the City without further approval by the City:

(a) the right to engage in all those activities and uses that: (i) are permitted by governmental statute or regulation; and (ii) are not inconsistent with the Purpose of this Restriction;

(b) the right to maintain and repair the exterior of the Building strictly according to the Secretary's Standards, provided that the WHA use in-kind materials and colors, applied with workmanship comparable to that which was used in the construction or application of those materials being repaired or maintained, for the purpose of retaining in good condition the appearance and construction of the Building. Changes in appearance, materials, colors or workmanship from that existing prior to the maintenance and repair requires the prior approval of the City in accordance with the provisions of paragraphs 3.1 and 3.2;

(c) the right to make changes of any kind to the interior of the Building, as long as interior changes have no impact on the exterior view of the Key Features.

7. Casualty Damage or Destruction. In the event that the exterior of the Building or any part thereof shall suffer major damage or destruction by fire, flood, windstorm, hurricane, earth movement, or other casualty, WHA shall notify the City in writing within fourteen (14) days of the damage or destruction or such reasonable time thereafter, depending upon the circumstances of the damage or destruction, such notification including what, if any, emergency work has already been completed. No repairs or reconstruction of any type, other than temporary emergency work to prevent further damage to the Building and to protect public safety, shall be undertaken by WHA without the City's prior written approval. Within ninety (90) days of the date of damage or destruction, if required by the City, WHA at its expense shall submit to the City a written report prepared by a qualified restoration architect and an engineer who are acceptable to WHA and the City, which report shall include the following:

(a) an assessment of the nature and extent of the damage;

(b) a determination of the feasibility of the restoration of the Building and/or reconstruction of damaged or destroyed portions of the Building; and

(c) a report of such restoration/reconstruction work necessary to return the Building to the condition existing as of the date hereof.

8. Review After Casualty Damage or Destruction. If, after reviewing the report provided in paragraph 7 and assessing the availability of insurance proceeds after satisfaction of any mortgagee's/lender's claims under paragraph 9, WHA and the City agree that the Purpose of the Restriction will be served by such restoration/reconstruction, WHA and the City shall establish a schedule under which WHA shall complete the restoration/reconstruction of the Building in accordance with plans and specifications consented to by the parties up to at least the total of the casualty insurance proceeds available to WHA.

If, after reviewing the report and assessing the availability of insurance proceeds after satisfaction of any mortgagee's/lender's claims under paragraph 9, WHA and the City agree that restoration/reconstruction of the Building is impractical or impossible, or agree that the Purpose of the Restriction would not be served by such restoration/reconstruction, WHA may, with the prior written consent of the City, alter, demolish, remove, or raze the Building, and/or construct new improvements on the Property. WHA and the City may then agree to extinguish this Restriction in whole or in part in accordance with the laws of the Commonwealth of Massachusetts and paragraph 21.1 hereof.

If, after reviewing the report and assessing the availability of insurance proceeds after satisfaction of any mortgagee's/lender's claims under paragraph 9, WHA and the City are unable to agree that the Purpose of the Restriction will or will not be served by such restoration/reconstruction, the matter may be referred by any party to binding arbitration and settled in accordance with the Commonwealth of Massachusetts's arbitration statute then in effect.

9. Insurance. WHA shall keep the Building insured by an insurance company rated "A1" or better by Best's for the full replacement value(against loss from perils commonly insured under standard fire and extended coverage policies and comprehensive general liability insurance against claims for personal injury, death, and property damage. Property damage insurance shall include change in condition and building ordinance coverage, in form and amount sufficient to replace fully the damaged Building without cost or expense to WHA or contribution or coinsurance from WHA. WHA shall deliver to the City, within ten (10) business days of the City's written request thereof, certificates of such insurance coverage. Provided, however, that whenever the Property is encumbered with a mortgage or deed of trust, nothing contained in this paragraph shall jeopardize the prior claim, if any, of the mortgagee/lender to the insurance proceeds.

INDEMNIFICATION; TAXES

10. Indemnification. Except for any instance of gross negligence or willful misconduct on the part of the City or the City's agent, director, officer, employee, or independent contractor, the following shall apply: WHA hereby agrees to pay, protect, indemnify, hold harmless and defend at its own cost and expense, the City, its agents, directors, officers, and employees, or independent contractors from and against any and all claims, liabilities, expense, costs, damages, losses, and expenditures (including reasonable attorney's fees and disbursements hereafter incurred) arising out of or in connection with injury to or death of any person as a result of the existence of this Restriction; physical damage to the Property; the presence or release in, on or about the Property, at

any time, of any substance now or hereafter defined, listed or otherwise classified pursuant to any law, ordinance, or regulation as a hazardous, toxic, polluting, or contaminating substance; or other injury, death or other damage occurring on or about the Property; unless such injury, death or damage is caused by the City or any agent, director, officer, employee, or independent contractor of the City. In the event that WHA is required to indemnify the City pursuant to the terms of this paragraph, the amount of such indemnity, until discharged, shall constitute a lien on the Property.

11. **Taxes.** WHA shall pay immediately, when first due and owing, all general taxes, special taxes, special assessments, water charges, sewer service charges, and other charges which may become a lien on the Property unless WHA timely objects to the amount or validity of the assessment or charge and diligently prosecutes an appeal thereof, in which case the obligation hereunder to pay such charges shall be suspended for the period permitted by law for prosecuting such appeal and any applicable grace period following completion of such action. In place of WHA, the City is hereby authorized, but in no event required or expected, to make or advance upon three (3) days prior written notice to WHA any payment relating to taxes, assessments, water rates, sewer rentals and other governmental or municipality charge, fine, imposition, or lien asserted against the Property. The City may make such payment according to any bill, statement, or estimate procured from the appropriate public office without inquiry into the accuracy of such bill, statement, or assessment or into the validity of such tax, assessment, sale, or forfeiture. Such payment if made by the City shall constitute a lien on the Property.

ADMINISTRATION AND ENFORCEMENT

12. **Written Notice.** Any notice which either WHA or the City may desire or be required to give to the other party shall be in writing and shall be delivered by one of the following methods - facsimile transmission, or by first class mail postage prepaid, or hand delivery; if to WHA, at:

Warren House Associates Limited Partnership
C/o Newton Community Development Foundation,
Inc.
425 Watertown Street, Suite 205
Newton, MA 02458

and if to the City, at: Newton Historical Commission
1000 Commonwealth Avenue
Newton Centre, MA 02459

Each party may change its address set forth herein by a notice to such effect to the other party.

13. Evidence of Compliance. Upon request by WHA, the City shall promptly furnish WHA with certification that, to the best of the City's knowledge, WHA is in compliance with the obligations of WHA contained herein or that otherwise evidences the status of this Restriction to the extent of the City's knowledge thereof.

14. Inspection. With the consent of WHA, representatives of the City shall be permitted at reasonable times to inspect the Building each May on an annual basis at the convenience of WHA and the City. WHA covenants not to withhold unreasonably its consent in determining dates and times for such inspections.

15. The City's Remedies. The City may, after thirty (30) days' prior written notice to WHA, institute suit(s) to enjoin any violation of the terms of this Restriction by ex parte, temporary, preliminary, and/or permanent injunction, including prohibitory and/or mandatory injunctive relief, and to require the restoration of the Building to the condition and appearance that existed prior to the violation complained of. The City shall also have available all legal and other equitable remedies to enforce WHA's obligations hereunder.

In the event WHA is found to have violated any of their obligations, WHA shall reimburse the City for any reasonable costs or documented expenses incurred in connection with the City's enforcement of the terms of this Restriction, including court costs, and attorney's, architectural, engineering, and expert witness fees.

In the event that WHA is required to reimburse the City pursuant to the terms of this Paragraph, the amount of such reimbursement until discharged, shall constitute a lien on the Property.

Exercise by the City of one remedy hereunder shall not have the effect of waiving or limiting any other remedy, and the failure to exercise any remedy shall not have the effect of waiving or limiting the use of any other remedy or the use of such remedy at any other time.

16. Notice from Government Authorities. WHA shall deliver to the City copies of any notice of violation or lien relating to the Property received by WHA from any government authority within five (5) days of receipt by WHA. Upon request by the City, WHA shall promptly furnish the City with evidence of

WHA's compliance with such notice or lien where compliance is required by law.

BINDING EFFECT; ASSIGNMENT

17. **Term.** This restriction shall terminate upon the expiration or earlier termination of the Ground Lease, but in no event later than December 19, 2056. The City of Newton is a "governmental body" as that term is defined in G.L. c. 184, §26.

18. **Runs with the Land.** Except as provided in paragraphs 8 and 21.1, the obligations imposed by this Restriction shall be effective from the date of recording through the expiration or earlier termination of the Ground Lease, but in no event later than December 19, 2056, and shall be deemed to run as a binding servitude with the Building. This Restriction shall extend to and be binding upon WHA and the City, their respective successors in interest and all persons hereafter claiming under or through WHA and the City, and the words "WHA" and "the City" when used herein shall include all such persons. Any right, title, or interest herein granted to the City also shall be deemed granted to each successor and assign of the City and each such following successor and assign thereof, and the word "the City" shall include all such successors and assigns.

WHA agree to incorporate by reference the terms of this Restriction in any deed or other legal instrument by which WHA transfer any interest in all or a portion of the Property, including without limitation a leasehold interest for a term greater than one year, but excluding residential leases.

Anything contained herein to the contrary notwithstanding, an owner of the Building shall have no obligation pursuant to this instrument where such owner shall cease to have any ownership interest in the Building by reason of a bona fide transfer. The restrictions, stipulations, and covenants contained in this Restriction shall be inserted by WHA, by express reference, in any subsequent deed or other legal instrument by which WHA divests itself of title to the Property or any part thereof, including by way of example and not limitation, a lease of all or a portion of the Property, but excluding any lease with a term of fewer than ninety (90) days, and also excluding residential leases.

19. **Assignment.** The City may convey, assign, or transfer this Restriction to a unit of federal, state, or local government or to a similar local, state, or national organization that is a "qualified organization" that qualifies under the Act as an eligible donee whose purposes, *inter alia*, are to promote preservation or conservation of historical, cultural, or architectural resources, provided that any such conveyance, assignment, or transfer requires that the Purpose for which

the Restriction was granted will continue to be carried out as a condition of the transfer. WHA shall give prior written approval of such conveyance, assignment, or transfer by the City, such approval not to be unreasonably withheld.

20. Recording and Effective Date. The City shall do and perform at its own cost all acts necessary to the prompt recording of this instrument in the Middlesex County (Southern District) Registry of Deeds. WHA and the City intend that the restrictions arising under this Restriction take effect on the day and year this instrument is recorded in the land records of the Middlesex County.

EXTINGUISHMENT

21.1 Extinguishment. WHA and the City hereby recognize that circumstances may arise that may make impossible the continued ownership or use of the Building in a manner consistent with the purpose of this Restriction and necessitate extinguishment of the Restriction. Such circumstances may include, but are not limited to, partial or total destruction of the Building resulting from casualty. Extinguishment must be the result of a judicial proceeding in a court of competent jurisdiction and shall meet the requirements of the Act for extinguishment. In the event of any sale of all or a portion of the Property (or of any other property received in connection with an exchange or involuntary conversion of the Property), the proceeds of such sale shall be paid to WHA.

21.2 Condemnation. If all or any part of the Property is taken under the power of eminent domain by public, corporate, or other authority, or otherwise acquired by such authority through a purchase in lieu of a taking, WHA and the City shall join in appropriate proceedings at the time of such taking to recover the full value of those interests in the Property that are subject to the taking and all incidental and direct damages resulting from the taking. Such recovered proceeds shall be paid to WHA.

22. Interpretation. The following provisions shall govern the effectiveness, interpretation, and duration of the Restriction.

(a) Any rule of strict construction designed to limit the breadth of restrictions on alienation or use of Building shall not apply in the construction or interpretation of this Restriction, and this instrument shall be interpreted broadly to effect its Purpose.

(b) This instrument may be executed in two counterparts, one of which may be retained by the WHA, and the other, after recording, to be retained by the City. In the event of any discrepancy between the counterparts produced, the recorded counterpart shall in all cases govern. In the event of any discrepancy between two copies of any documentation retained by the parties, the copy retained by the City shall control.

(c) This instrument is made pursuant to the Act, but the invalidity of such Act or any part thereof shall not affect the validity and enforceability of this Restriction according to its terms, it being the intent of the parties to agree and to bind themselves, their successors, and their assigns in perpetuity to each term of this instrument whether this instrument be enforceable by reason of any statute, common law, or private agreement in existence either now or hereafter. The invalidity or unenforceability of any provision of this instrument shall not affect the validity or enforceability of any other provision of this instrument or any ancillary or supplementary agreement relating to the subject matter thereof.

(d) Nothing contained herein shall be interpreted to authorize or permit WHA to violate any ordinance or regulation relating to building materials, construction methods, or use. In the event of any conflict between any such ordinance or regulation and the terms hereof, WHA promptly shall notify the City of such conflict and shall cooperate with the City and the applicable governmental entity to accommodate the purposes of both this Restriction and such ordinance or regulation.

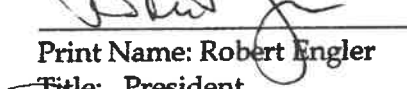
23. Amendment. If circumstances arise under which an amendment to or modification of this Restriction would be appropriate, WHA and the City may by mutual written agreement jointly amend this Restriction, provided that no amendment shall be made that will adversely affect the qualification of the Restriction or the status of the City under the laws of the Commonwealth of Massachusetts. Any such amendment shall be consistent with the protection of the preservation values of the Building and the Purpose of this Restriction; shall not affect its perpetual duration; shall not permit any private inurement to any person or entity; and shall not adversely impact the overall architectural, historic, natural habitat, and open space values protected by this Restriction. Any such amendment shall be effective when the requirements of the Act with respect to amendments have been met and the amendment is recorded in the land records of the Middlesex County. Nothing in this paragraph shall require WHA or the City to agree to any amendment or to consult or negotiate regarding any amendment.

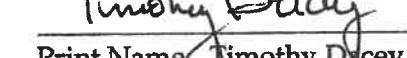
THIS RESTRICTION reflects the entire agreement of WHA and the City. Any prior or simultaneous correspondence, understandings, agreements, and representations are null and void upon execution hereof, unless set out in this instrument.

TO HAVE AND TO HOLD, the said Historic Preservation Restriction, unto the said City and its successors and permitted assigns forever. This HISTORIC PRESERVATION RESTRICTION may be executed in two counterparts and by each party on a separate counterpart, each of which when so executed and delivered shall be an original, but both of which together shall constitute one instrument.


IN WITNESS WHEREOF, WHA and the City have set their hands this 7ⁿ day of January, 2010.


WHA:
Warren House Associates
Limited Partnership
Newton Community Development
Foundation III, Inc.
General Partner

BY: 
Print Name: Robert Engler
Title: President

BY: 
Print Name: Timothy Dacey
Title: Treasurer

THE CITY:
City Of Newton

BY: 
Donald Lang, Chairman
Newton Historical Commission

APPROVED:

Setti D. Warren, Mayor

Approved as to legal character
and form:


Assistant City Solicitor

COMMONWEALTH OF MASSACHUSETTS

MIDDLESEX, SS.

January 6, 2010

On this 6th day of January, 2010, before me, the undersigned notary public, personally appeared the above-named Robert Engler, as President of Newton Community Development Foundation III, Inc., as general partner of and on behalf of Warren House Associates Limited Partnership proved to me through satisfactory evidence of identification, which was Drivers License, to be the person whose name is signed on the preceding document, and acknowledged to me that he signed it voluntarily for its stated purpose, as President of Newton Community Development Foundation III, Inc., as general partner of and on behalf of Warren House Associates Limited Partnership

Liya Alekseyev
Notary Public
My Commission expires: 10/24/2014

COMMONWEALTH OF MASSACHUSETTS

MIDDLESEX, SS.

January 7, 2010

On this 7th day of January, 2010, before me, the undersigned notary public, personally appeared the above-named Donald Lang, proved to me through satisfactory evidence of identification, which was personal knowledge, to be the person whose name is signed on the preceding document, and acknowledged to me that he signed it voluntarily for its stated purpose, as Chairman, Newton Historical Commission, City of Newton.



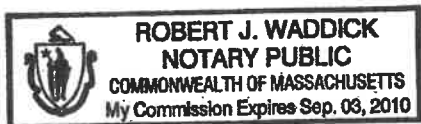
Anne Phelps
Notary Public
My Commission expires: 6-27-2014

COMMONWEALTH OF MASSACHUSETTS

MIDDLESEX, SS.

January 7, 2010

On this 7th day of January, 2010, before me, the undersigned notary public, personally appeared the above-named Setti D. Warren, proved to me through satisfactory evidence of identification, which was personally known to me, to be the person whose name is signed on the preceding document, and acknowledged to me that he signed it voluntarily for its stated purpose, as Mayor, of the City of Newton.



Rob J. Waddick
Notary Public
My Commission expires: _____

SCHEDULE OF EXHIBITS

- A. Legal Description
- B. Key Features
- C. Mortgage Subordination Agreement of Massachusetts Housing Finance Agency

Exhibit A

DEED

The CITY OF NEWTON, Massachusetts, a body corporate and politic organized under the laws of the Commonwealth of Massachusetts for consideration paid of Five Hundred Thousand (\$500,000.00) Dollars grants to WARREN HOUSE ASSOCIATES LIMITED PARTNERSHIP, a Massachusetts limited partnership of which Newton Community Development Foundation III, Inc. a Massachusetts corporation and New Keen Corporation a Massachusetts corporation are the general partners and having an address c/o Keen Development Corporation, 2 University Road, Cambridge, MA 02238 with QUITCLAIM COVENANTS:

The premises consisting solely of the buildings, including without limitation, all pipes, chases and conduits contained therein and improvements located in and upon the land known as 1600 Washington Street, Newton, Middlesex County bounded and described as follows:

Beginning at a point at the northeasterly corner of a parcel of land, situated on the southerly side of Washington Street, upon which #1600 Washington Street is located. Said point being approximately 389 feet southwesterly of the southwest corner of Washington Street and Myrtle Street, thence;

- S 45-00-00 E A distance of 322.15 feet to a point, thence;
- S 45-00-00 W A distance of 320.00 feet to a point, thence;
- S 45-00-00 E A distance of 82.85 feet to a point, thence;
- S 45-00-00 W A distance of 170.00 feet to a point, thence;
- N 45-00-00 W A distance of 120.00 feet to a point, thence;
- N 45-00-00 E A distance of 30.00 feet to a point, thence;
- N 45-00-00 W A distance of 272.75 feet to a point at the southerly sideline of Washington Street, the last (7) courses by land now or formerly of the City of Newton (recreation fields), thence;
- Northeasterly Along a curve to the right, having a radius of 870.00 feet, a distance of 146.18 feet to a point of tangency, thence;

MSD 01/02/92 01:17:00 498 25.00

plan # 2
405
1653
Focus 1600 Washington St Newton, MA

N 45-00-00 E A distance of 314.51 feet to the point of beginning, the last (2) courses by said Washington Street.

Containing: 3,737 acres plus or minus

and being shown on a certain plan entitled "Plan of Land in Newton, MA scale 1" = 40' November 25, 1991 Linenthal Eisnberg Anderson, Inc." recorded herewith.

Meaning and intending to convey only the buildings and other improvements set forth hereunder and not the land upon which such buildings and improvements are located, such land being the land referred to and the subject of a certain Ground Lease of even date herewith between the CITY OF NEWTON as Landlord and WARREN HOUSE ASSOCIATES LIMITED PARTNERSHIP as Tenant, notice of which Ground Lease is recorded herewith (hereinafter the "Ground Lease").

The premises granted herein are subject to a RIGHT OF REVERSION such that upon expiration or earlier termination of the Ground Lease title to such buildings, pipes, chases, conduits and improvements to the real property as may then be located on the land and owned by the Grantee or persons claiming by, through or under the Grantee shall automatically revert to the Grantor. Upon such reversion the following provisions shall bind, effect and be covenants running with the granted premises:

- (1) The CITY OF NEWTON shall assume any then outstanding obligations of the Grantee, its successors or assigns to maintain affordable housing pursuant to Condition # 3 of a Special Permit/Site Plan Approval issued by the Board of Aldermen in Board Order #236-89(5) recorded with Middlesex (Southern District) Registry of Deeds in Book 21293 Page 21;
- (2) The CITY OF NEWTON shall maintain the low income rent-subsidized housing units in any buildings to which it obtains title by reversion as low income housing units in perpetuity or for such shorter period commencing with the date of reversion as shall be the longest period for which such a restriction may then be enforced at law;
- (3) The obligations of the CITY OF NEWTON under the preceding paragraphs (1) and (2) shall be satisfied in full should the CITY OF NEWTON relocate the residents of such buildings to other units of comparable cost (to the residents) and quality elsewhere in Newton.

The provisions of the preceding paragraphs (1), (2) and (3) shall be covenants running with the land and the property

granted hereby and shall be binding upon the CITY OF NEWTON, its successors and assigns for the benefit of and subject to enforcement by the residents of any buildings which are subject to reversion hereunder from and after the date of such reversion. For purposes of this Deed the term "low income" shall mean persons or families as the case may be having incomes less than eighty (80%) percent of the median income for the Boston SMSA as determined by the then determining agency of the United States government.

The buildings and improvements granted herein are located upon a portion of land taken by the CITY OF NEWTON in two separate takings recorded with Middlesex (Southern District) Registry of Deeds in Book 4781 Page 26 and Book 9361 Page 236. See also deeds of Annie L.B. Barrett to the CITY OF NEWTON dated October 28, 1924 recorded with said Deeds in Book 4785 Page 73 and of Olive T. Spencer to the CITY OF NEWTON dated December 22, 1924 recorded with said Deeds in Book 4801 Page 442.

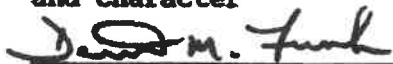
The obligation of the Grantee hereunder pursuant to M.G.L. c. 44 Section 63A has been satisfied.

Executed as a sealed instrument this 20th day of December, 1991.

CITY OF NEWTON

BY: 
Theodore D. Mann, Mayor

Approved as to legal form and character


Daniel M. Funk
City Solicitor

DEED

COMMONWEALTH OF MASSACHUSETTS

Middlesex, ss. December 23, 1991

Then personally appeared before me Theodore D. Mann, Mayor of the City of Newton and acknowledged the foregoing document to be his free act and deed for and behalf of the City of Newton.


Notary Public

notice.les

The premises consisting solely of the buildings, in-
clude without limitation, all pipes, chases and conduits contain-
ing wire and improvements located in and upon the land know-
n as 100 Washington Street, Newton, Middlesex County bounded as
described as follows:

Beginning at a point at the northeasterly corner of a
parcel of land, situated on the southerly side of Washing-
ton Street, upon which #1600 Washington Street is located. Sa-
id point being approximately 389 feet southwesterly of the
northwest corner of Washington Street and Myrtle Street,
thence;

- S 45-00-00 E A distance of 322.15 feet to a point,
thence;
- S 45-00-00 W A distance of 320.00 feet to a point,
thence;
- S 45-00-00 E A distance of 82.85 feet to a point,
thence;
- S 45-00-00 W A distance of 170.00 feet to a point,
thence;
- N 45-00-00 W A distance of 120.00 feet to a point,
thence;
- N 45-00-00 E A distance of 30.00 feet to a point,
thence;
- N 45-00-00 W A distance of 272.75 feet to a point at
southerly sideline of Washington Street,
the last (7) courses by land now or
formerly of the City of Newton (recreational
fields), thence;
- Northeasterly Along a curve to the right, having a radius
of 870.00 feet, a distance of 146.18 feet
to a point of tangency, thence;

EXHIBIT B

KEY FEATURES

Warren House, 1600 Washington Street, Newton, MA

Any changes which will affect the facade, roof, and grounds of the property must be reviewed and approved by the Newton Historical Commission or its staff prior to receiving a building permit. The Commission will give special consideration to changes that will affect the key architectural features (“Key Features”) of the Building including the following architectural elements:

- Style, form, and massing of the original 1927 construction and the 1959 addition.
- Brick façade including watertable, exposed foundation, windows and window openings, gutters, downspouts, and cast stone and other stone ornamental features.
- Original entrances including staircases doors, lights, and railings.
- Roof, including slate roof, cornice, parapet, pediments, chimneys, louvers, vents, bell tower, and cupola.
- Open front yard with plantings.

Photocopies of baseline photographs of Building are attached hereto.

Exhibit C
Subordination of Lenders

SUBORDINATION AGREEMENT

Massachusetts Housing Finance Agency, with a principal place of business at One Beacon Street, Boston, now the holder of the following mortgage and security interest from Warren House Associates Limited Partnership, of 425 Watertown Street, Suite 205, Newton:

Mortgage dated December 20, 1991, in the original principal amount of Six Million Sixty Thousand Dollars (\$6,060,000) and duly recorded with the Middlesex County (Southern District) Registry of Deeds in Book 21653, Page 410;

does hereby subordinate the lien of said mortgages and security interests and the notes and claims secured thereby to a HISTORIC PRESERVATION RESTRICTION dated January 7, 2010, recorded herewith, from said Warren House Associates Limited Partnership to the City of Newton, its successors and/or assigns, just as if said mortgage and security interest had been dated, executed, acknowledged, delivered and recorded after the Historic Preservation Restriction.

IN WITNESS WHEREOF the said Massachusetts Housing Finance Agency has caused its seal to be hereto affixed and these presents to be signed in its name and behalf by Laurie R. Wallach, its General Counsel, this 22 day of January, 2010.

MASSACHUSETTS HOUSING FINANCE
AGENCY

By: [Signature]
Its: General Counsel

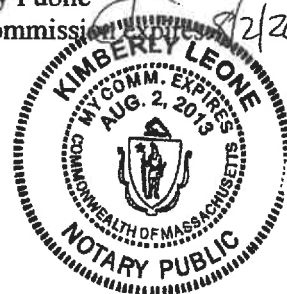
COMMONWEALTH OF MASSACHUSETTS

Suffolk, ss

On this 22nd day of JANUARY, 2010, before me, the undersigned notary public, personally appeared Laurie R. Wallach and proved to me through satisfactory evidence of identification, which were personal knowledge, to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily for its stated purpose.

[Signature]
Notary Public

My commission expires 8/2/2013



ATTACHMENT 7 –
MASSACHUSETTS HISTORICAL COMMISSION
INVENTORY FORM

Massachusetts Cultural Resource Information System

Scanned Record Cover Page

Inventory No: NWT.3890
Historic Name: Warren, Levi Junior High School
Common Name:
Address: 1600 Washington St

City/Town: Newton
Village/Neighborhood: West Newton;
Local No: WN-0134;
Year Constructed: 1927
Architectural Style(s): Colonial Revival;
Architect(s): Ripley and LeBoutillier; TAC; The Architects Collaborative;
Use(s): Abandoned or Vacant; Apartment House; Other Educational; Public School;
Significance: Architecture; Community Planning; Education;
Area(s): NWT.Z
Designation(s): Nat'l Register Individual Property (02/16/1990); Nat'l Register MRA (02/16/1990);
Building Materials: Roof: Slate;
Wall: Brick; Limestone; Stone, Cut; Wood;
Foundation: Stone, Uncut;
Demolished No



The Massachusetts Historical Commission (MHC) has converted this paper record to digital format as part of ongoing projects to scan records of the Inventory of Historic Assets of the Commonwealth and National Register of Historic Places nominations for Massachusetts. Efforts are ongoing and not all inventory or National Register records related to this resource may be available in digital format at this time.

The MACRIS database and scanned files are highly dynamic; new information is added daily and both database records and related scanned files may be updated as new information is incorporated into MHC files. Users should note that there may be a considerable lag time between the receipt of new or updated records by MHC and the appearance of related information in MACRIS. Users should also note that not all source materials for the MACRIS database are made available as scanned images. Users may consult the records, files and maps available in MHC's public research area at its offices at the State Archives Building, 220 Morrissey Boulevard, Boston, open M-F, 9-5.

Users of this digital material acknowledge that they have read and understood the MACRIS Information and Disclaimer (<http://mhc-macris.net/macrisdisclaimer.htm>)

Data available via the MACRIS web interface, and associated scanned files are for information purposes only. THE ACT OF CHECKING THIS DATABASE AND ASSOCIATED SCANNED FILES DOES NOT SUBSTITUTE FOR COMPLIANCE WITH APPLICABLE LOCAL, STATE OR FEDERAL LAWS AND REGULATIONS. IF YOU ARE REPRESENTING A DEVELOPER AND/OR A PROPOSED PROJECT THAT WILL REQUIRE A PERMIT, LICENSE OR FUNDING FROM ANY STATE OR FEDERAL AGENCY YOU MUST SUBMIT A PROJECT NOTIFICATION FORM TO MHC FOR MHC'S REVIEW AND COMMENT. You can obtain a copy of a PNF through the MHC web site www.sec.state.ma.us/mhc under the subject heading "MHC Forms."

Commonwealth of Massachusetts
Massachusetts Historical Commission
220 Morrissey Boulevard, Boston, Massachusetts 02125
www.sec.state.ma.us/mhc

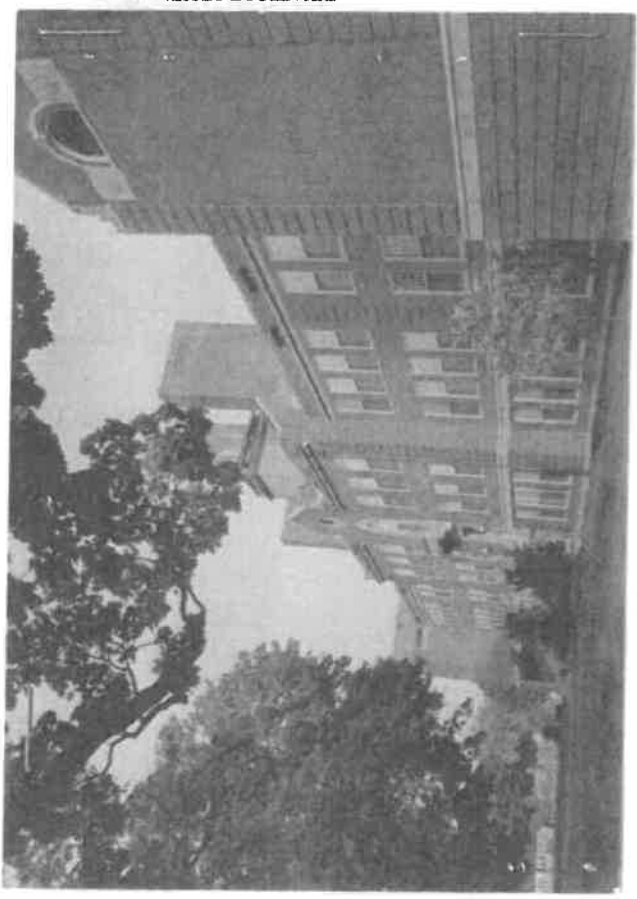
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NWT. 3890

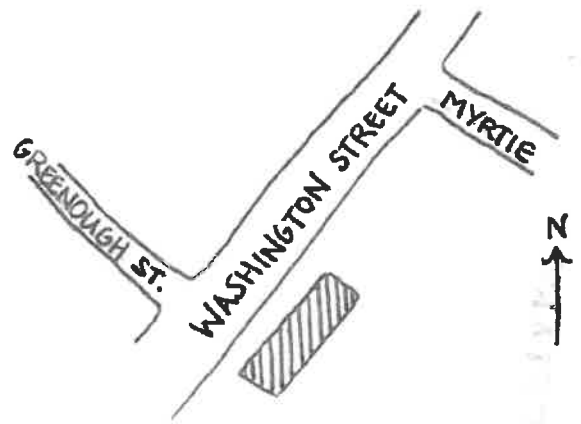
FORM B - BUILDING

MASSACHUSETTS HISTORICAL COMMISSION
MASSACHUSETTS ARCHIVES BUILDING
220 MORRISSEY BOULEVARD

Assessor's number	USGS Quad	Area(s)	Form Number
	Boston South	Z	3890



Town Newton
 Place (neighborhood or village) West Newton
 Address 1600 Washington Street
 Historic Name Levi F. Warren Junior High School
 Uses: Present Residential
 Original Junior high school
 Date of Construction 1927
 Source Water and Building Dept. records
 Style/Form Georgian Revival
 Architect/Builder Ripley & LeBoutillier
 Exterior Material:
 Foundation Stone
 Wall/Trim Brick and Limestone
 Roof Slate Shingles
 Outbuildings/Secondary Structures None
 Major Alterations (with dates) Three story addition
(1959); Adaptive re-use completed in 1993 converted
the school into fifty nine apartments.
 Condition Excellent
 Moved No yes Date _____
 Acreage C 14.5
 Setting The building is situated on a major
thoroughfare outside West Newton Center, it is
surrounded by playing fields, tennis courts, a parking lot
to the south, and modest two story houses.



Updated by Elizabeth Guckenberger
 Organization _____
 Date (month/year) December, 1997

Follow Massachusetts Historical Commission Survey Manual instructions for completing this form.

BUILDING FORM

ARCHITECTURAL DESCRIPTION *—see continuation sheet*

Describe architectural features. Evaluate the characteristics of this building in terms of other buildings within the community.

The Old Warren Junior High school sits facing west on Washington Street. While typical of several other early 20th century Georgian Revival public schools in Newton from the same era, the grandeur and elegance of this building sets it apart from the others.

The building is rectangular in mass, with three, two story wings that project from the eastern (back side) of the structure. It rises two stories above a high, rusticated basement with full sized windows. A wide staircase flanked by iron hand rails leads to the front door of the seven bay, brick, central section of the building. A pedimented frontispiece, cupola, second story palladian window with balustraded balcony, and bridged chimneys accent the facade of the central structure. Bands of limestone separate the basement from the first floor, and the second floor from the roof line.

The first floor windows retain their original sash configuration of 20 over 20. The second floor windows also retain their original sash configuration of 18 over 30 peaked with palladian-style arched panes. Set back from the central section, two symmetrical eight-bay hyphens flank the main portion of the building. Each hyphen has three stories (including the basement) of eight windows (20 over 20 sash). The hyphens end with blank, pedimented pavilions. The end pavilions rise higher than the main rectangular block of the building, and project behind the structure forming two of the three rear wings. The two end wings retain their original window treatment, extending four bays on either side of a small, ground level door. The third wing projects from the central section of the structure, towards the rear, and has modified fenestration treatment, a new pedimented rear entrance, and individualized porch access for third floor residents.

HISTORICAL NARRATIVE *—see continuation sheet*

Discuss the history of the building. Explain its associations with local (or state) history. Include uses of the building, and the role(s) the owners/occupants played within the community.

The construction of a junior high school in the West Newton area had been under discussion since 1922, but the Levi F. Warren Junior High School was not built until 1926-7. When it was finally completed in September of 1927, and ready for occupancy, it was deemed one of the most modernly equipped buildings, and praised for its low maintenance fees and efficient operation. The school was named after Levi F. Warren, a graduate of Bridgewater Norman School of education. Born in Weston, Massachusetts, Warren came to Newton in 1869. He served as teacher and head master of many schools in Newton and Salem, and was involved in public education for most of his life. He completed 28 years in the Newton School system, occupying the position of headmaster of the Pierce School in West Newton from 1869 until his death in 1897. Thirty years after his death, the Levi F. Warren Junior High School was built in his honor and dedicated to his devotion to public education in the city of Newton.

Between the years 1908 and 1919, no new schools were constructed in Newton. Housing sales and new development were rising, however, especially by the mid-teens. World War I slowed construction significantly, but school enrollment jumped from 7,236 in 1909 to 8,623 by 1919. Subdivision and other development hit an all time high in 1925, and in the decade to come, school population increased by 27%. By 1939, enrollment in the Newton public school system was just over 12,000 and the city had constructed fourteen new schools.

Architects for the Warren Junior High School were Ripley and LeBoutillier, a Boston firm located at 45 Bromfield Street in Boston. Hubert Ripley, a Newton resident, began his career in the offices of Daniel Burnham, and later worked for Peabody and Stearns. Addison LeBoutillier, who grew up in Utica, New York, worked in Chicago for S.S. Beman, then came to Boston in 1893 where he joined forces with Ripley by 1913.

BIBLIOGRAPHY and/or REFERENCES *—see continuation sheet*

- Form-B Building Form-- Warren House (Candace Jenkins/ Susan Abele, January 1987)
- Building Records 1600 Washington Street
- School Committee Reports 1927, 1956
- Newton Graphic 9/9/27, 3/3/82

—Recommended for listing in the National Register of Historic Places. If checked, you must attach a complete National Register Criteria Statement form.

NWT. 3890

INVENTORY FORM CONTINUATION SHEET

MASSACHUSETTS HISTORICAL COMMISSION
MASSACHUSETTS ARCHIVES BUILDING
220 MORRISSEY BOULEVARD
BOSTON, MA 02125

Community Property Address
Newton 1600 Washington Street

Areas(s)	FormNo.
	3890

HISTORICAL NARRATIVE (cont.)

A three story addition to the school was designed and built by the Architects Collaborative of Cambridge in 1959. Twenty-three years later, in 1982, the school was closed due to declining enrollment throughout the city.

At a meeting on January 4, 1990, the Newton Historical Commission by a vote of 5 to 0 resolved to recognize and support the preservation proposals presented by keen Development for the adaptive reuse of the Warren Junior High School for housing. The resolution supported the proposed demolition of the later non-historic structures housing the gymnasium and classrooms to provide more space for on site parking at the rear of the building, thus allowing for the preservation of the green strip and walkway leading to the front entrance of the building. The resolution also called for minimization of required parking, conservation of as much green space as possible, restoration of period appropriate landscaping based on photographic research, as well as the retention of the front entrance stairs. The project was complete by 1993, and the old school now houses fifty nine apartments, twenty-one of which are low income occupancy. A Head Start Day Care Center is also on site.

FORM B - BUILDING

NRIND NRMRA 2/16/1990 [NWT.Z]

MASSACHUSETTS HISTORICAL COMMISSION
80 BOYLSTON STREET
BOSTON, MA 02116

NWT.3890

AREA

FORM NO.

WN-0134



Newton (West Newton)

Address 1600 Washington Street

Historic Name Levi Warren Jr. High School

Present vacant (since 1982)

Original Junior High School

DESCRIPTION

1927

Building permit

Style Georgian Revival

Architect Ripley & LeBoutillier

Exterior Wall Fabric brick

Outbuildings none

Major Alterations (with dates)

wins-1950

Condition poor

Moved no Date n/a

Acreage 165,000 sq.ft. C 3.78A

Setting major thoroughfare outside West

Newton village center and leading to
the western villages

Sketch Map: Draw map showing property's location in relation to nearest cross streets and/or geographical features. Indicate all buildings between inventoried property and nearest intersection(s). Indicate north

see attached map

UTM REFERENCE 19/315B20/4690080

USGS QUADRANGLE NEWTON

SCALE 1:25,000

Recorded by Candace Jenkins/Susan Abele

Organization Newton Historical Comm.

Date 1/87; rev. 3/88

NATIONAL REGISTER CRITERIA STATEMENT (if applicable)

The Levi F. Warren Junior High School possesses integrity of location, design, setting, materials, workmanship, feeling and association. As Newton's second Junior High School (F. A. Day Junior High School, Newtonville, 1922, was first) it reflects the city's rapid development in the early 20th century and the need to house a growing school population. Designed by the noted firm of Ripley & LeBoutillier in a masterful interpretation of the Georgian Revival style, it is Newton's most architecturally outstanding school with significance in this area enhanced by the integrity of original features. The Levi F. Warren Junior High School meets criteria A & C of the NRHP.

ARCHITECTURAL SIGNIFICANCE Describe important architectural features and evaluate in terms of other buildings within the community.

The Warren School is the earliest, and by far the most interesting architecturally of Newton's several Georgian Revival style public schools. It is a large, two story building with high basement which breaks up its long rectangular mass with imagination (compare with Carr School in Nonantum). The brick structure consists of a five-bay central section with pedimented frontispiece, cupola and bridged chimneys defining it above the roofline. Quoins offer further definition. This large central section, almost a school in its own right, is flanked by eight bay hyphens that are in turn terminated by pedimented end pavilions. These end pavilions have blank windowless walls and rich stone carving in the gable fields. They project beyond the front and rear elevations and contain secondary entries in brick porches on their flanks (N & S). Quoins define these elements as do rusticated basements. A two story wing that appears to be original extends from the center of the rear (E) elevation. A two story flat roofed brick wing was added to the right rear elevation in 1959 by the Architects Collaborative. The integrity of the school is affected only by its vacant status and generally poor condition. Playing fields surround the building.

HISTORICAL SIGNIFICANCE Explain the role owners played in local or state history and how the building relates to the development of the community.

School construction in Newton was at a standstill between 1908 and 1919. Housing sales however, were brisk and new building was up, particularly in the mid-teens. Although World War I slowed housing construction for several years, between 1909 and 1919 school enrollment began to rise considerably - from 7,236 to 8,623 in ten years. New building hit a record high in 1925 and in the following decade the school population increased 27%. By 1939, enrollment in the Newton School System was just over 12,000 and the city had constructed a total of 14 new schools.

Although the need for locating a Junior High School in the West Newton area had been under discussion since 1922, the Levi F. Warren Junior High School was not built until 1926-7. At completion Warren was said to be "one of the most modernly equipped and constructed buildings," and was praised for its ease of operation and low maintenance needs. Architects for Warren Junior High were Ripley and LeBoutillier, whose offices were at 45 Bromfield Street, Boston. Hubert Ripley, who began his career in the offices of Daniel Burnham, and Peabody and Stearns, was a Newton resident. Houses at 36 Birch Hill Road (his own, NV-G) and 271 Chestnut Street (WN-0116) were designed by him. Addison LeBoutillier, a native of Utica, New York, began his career in the offices of S. S. Beman of Chicago. He came to Boston in 1893 and became associated with Ripley about 1913.

The school, which was named for Levi F. Warren, headmaster of the Peirce School in West Newton until his death in 1897, celebrated its twenty-fifth anniversary in 1952 and in 1959, a three story addition, designed by The Architects Collaborative of Cambridge, was constructed. However, in recent years, budget constraints and reduced enrollment city-wide, forced the closing of this and several other Junior High Schools in Newton. Since the closing of Warren in 1982 a variety of re-use plans have been considered, including proposals to make it the site of a new library. At this time a plan for mixed residential use is under consideration but it has not yet been finalized.

BIBLIOGRAPHY and/or REFERENCES

Building Records 1600 Washington Street
School Committee Reports 1927, 1956
Newton Graphic 9/9/27, 2/7/52, 3/3/82

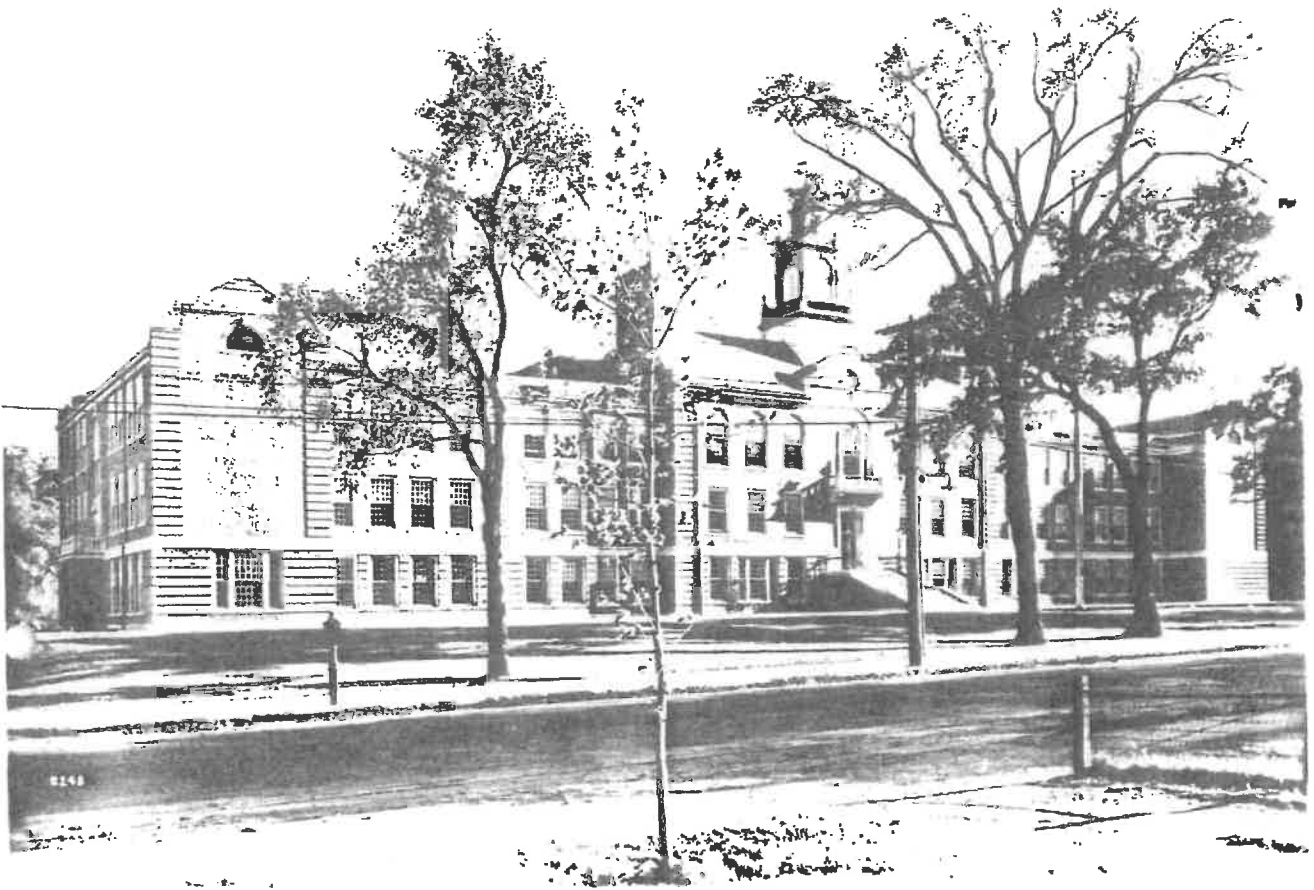
8/85

January 1928

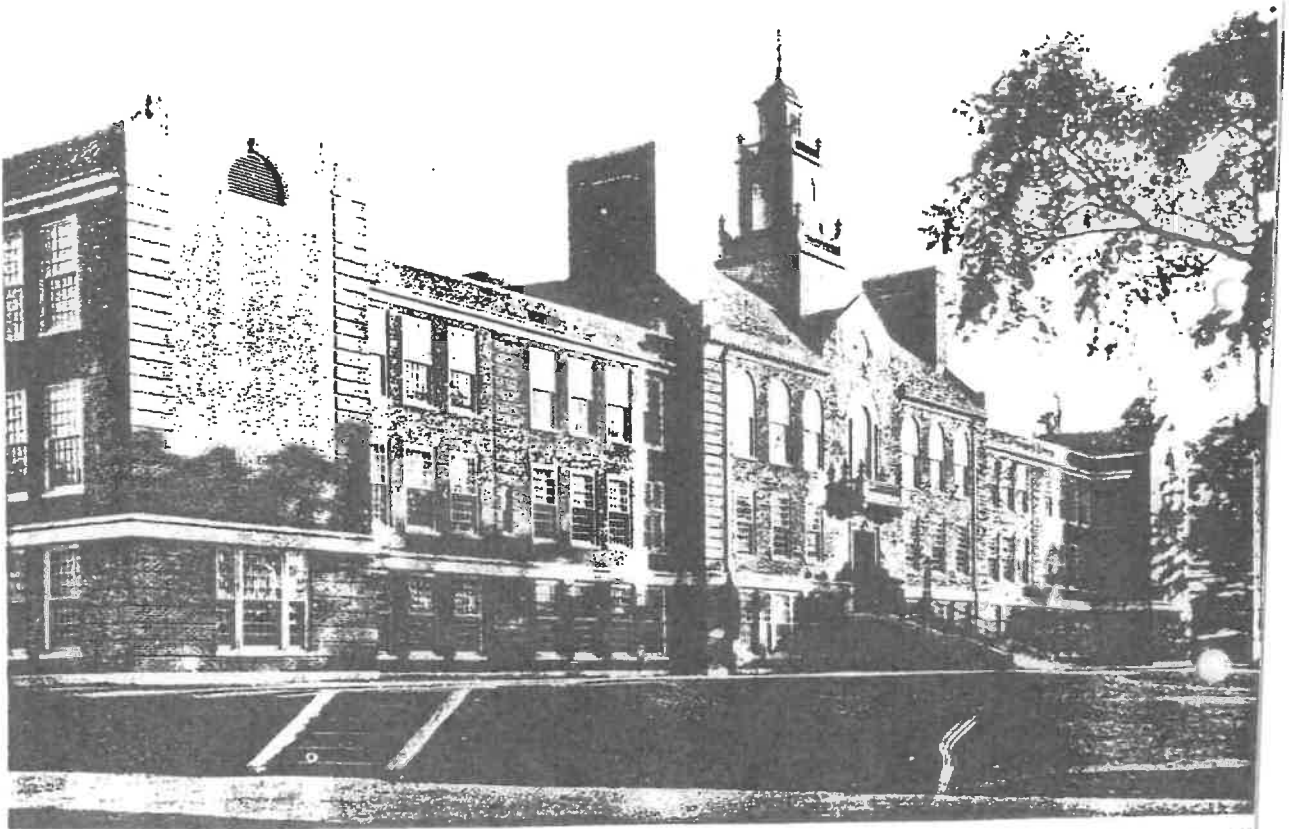
THE ARCHITECT
Warren Jr. High School

NWT.3890

Newton, MA-MRA



Newton, MA-MRA



Haskell, *Plan*

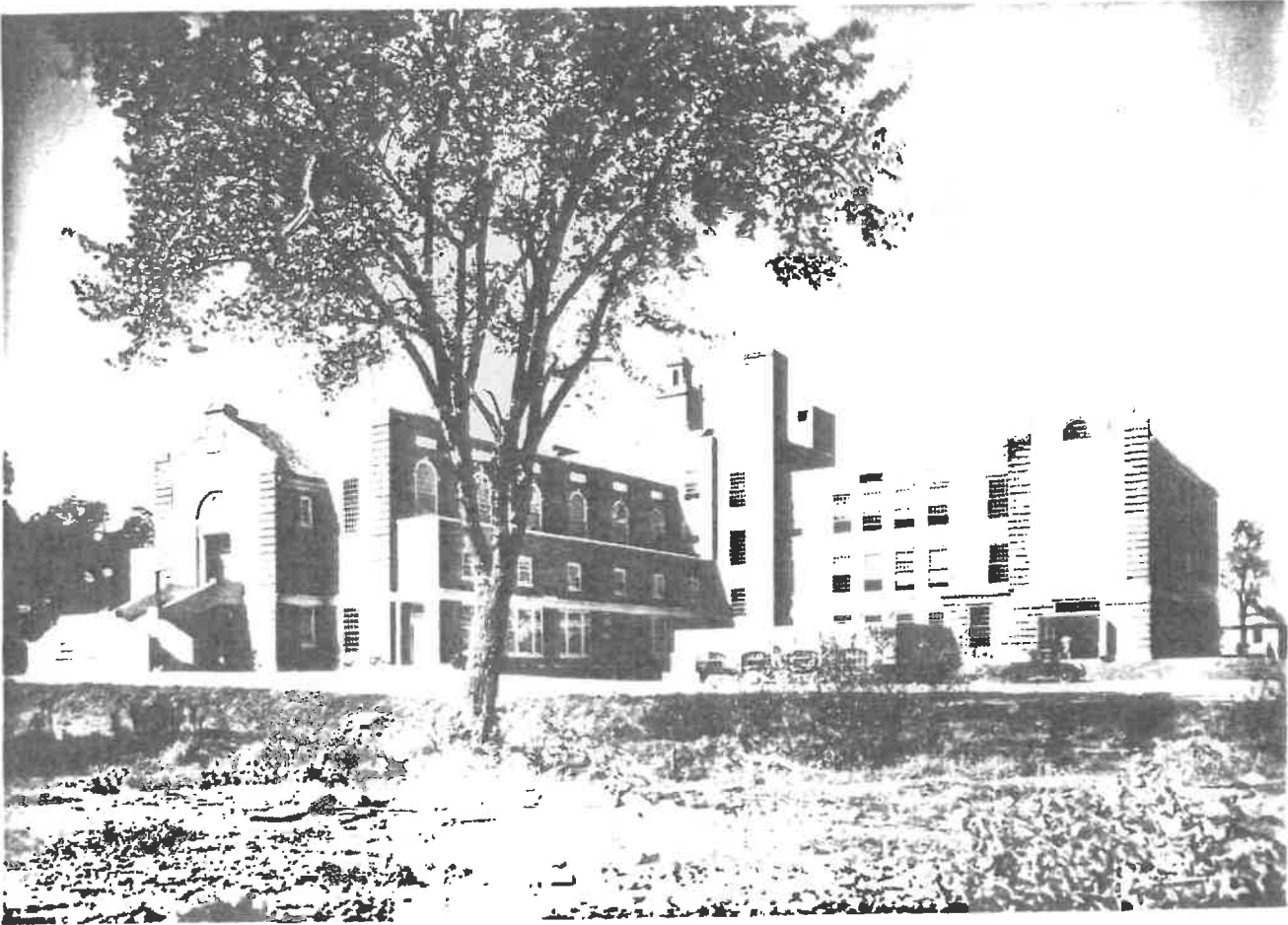
Ripley & LeBoutillier, Boston, 1904

vi F. Warren Junior High School, West Newton, Mass. (Plans on back)

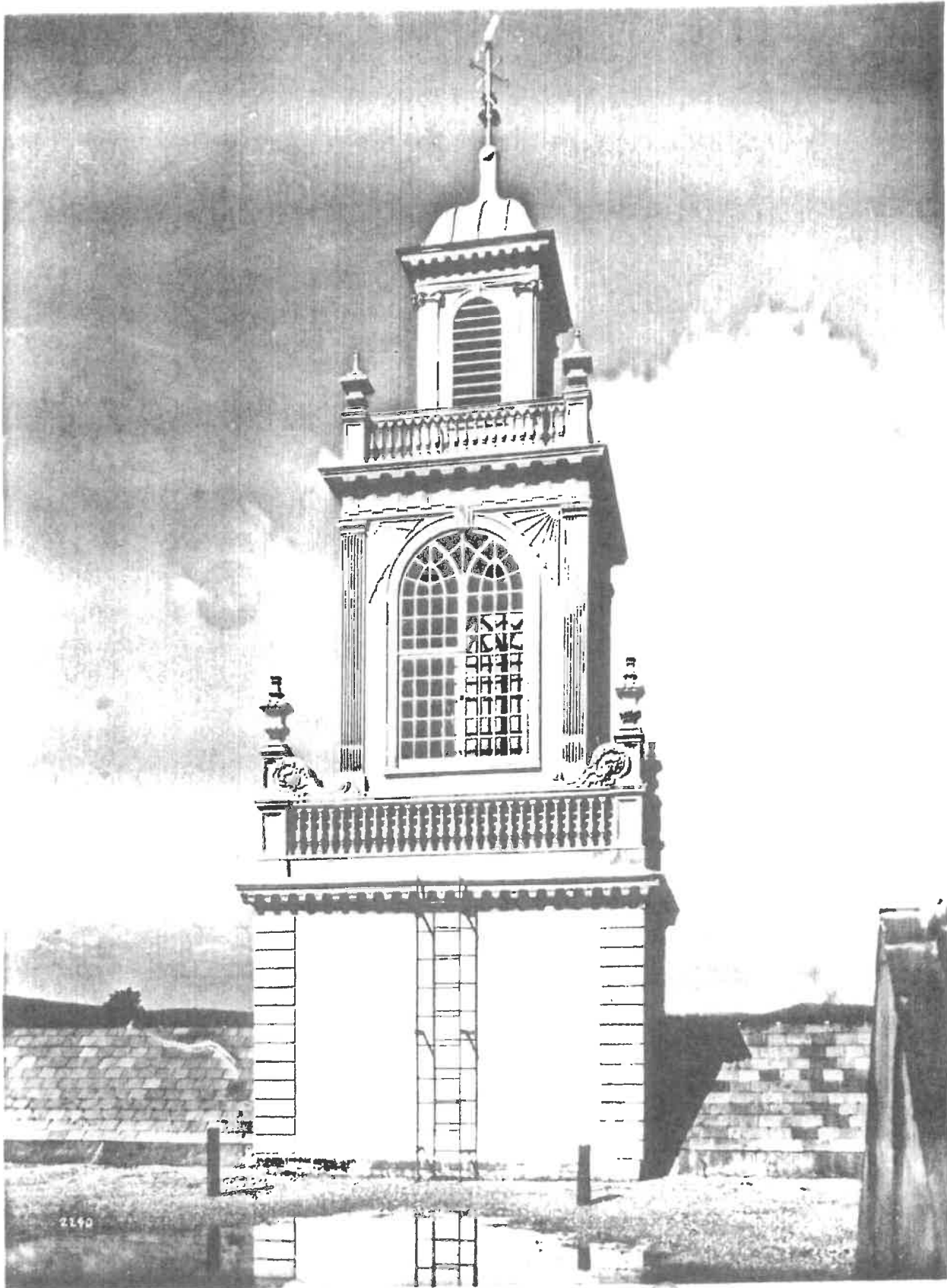
*The Architect Jan. 1928
Warren Jr. High School*

Newton, MA-MRA

NWT.3890



*The Architect Jan 1928
Warren Dr. High School*



2190

Newton, MA-MIRA

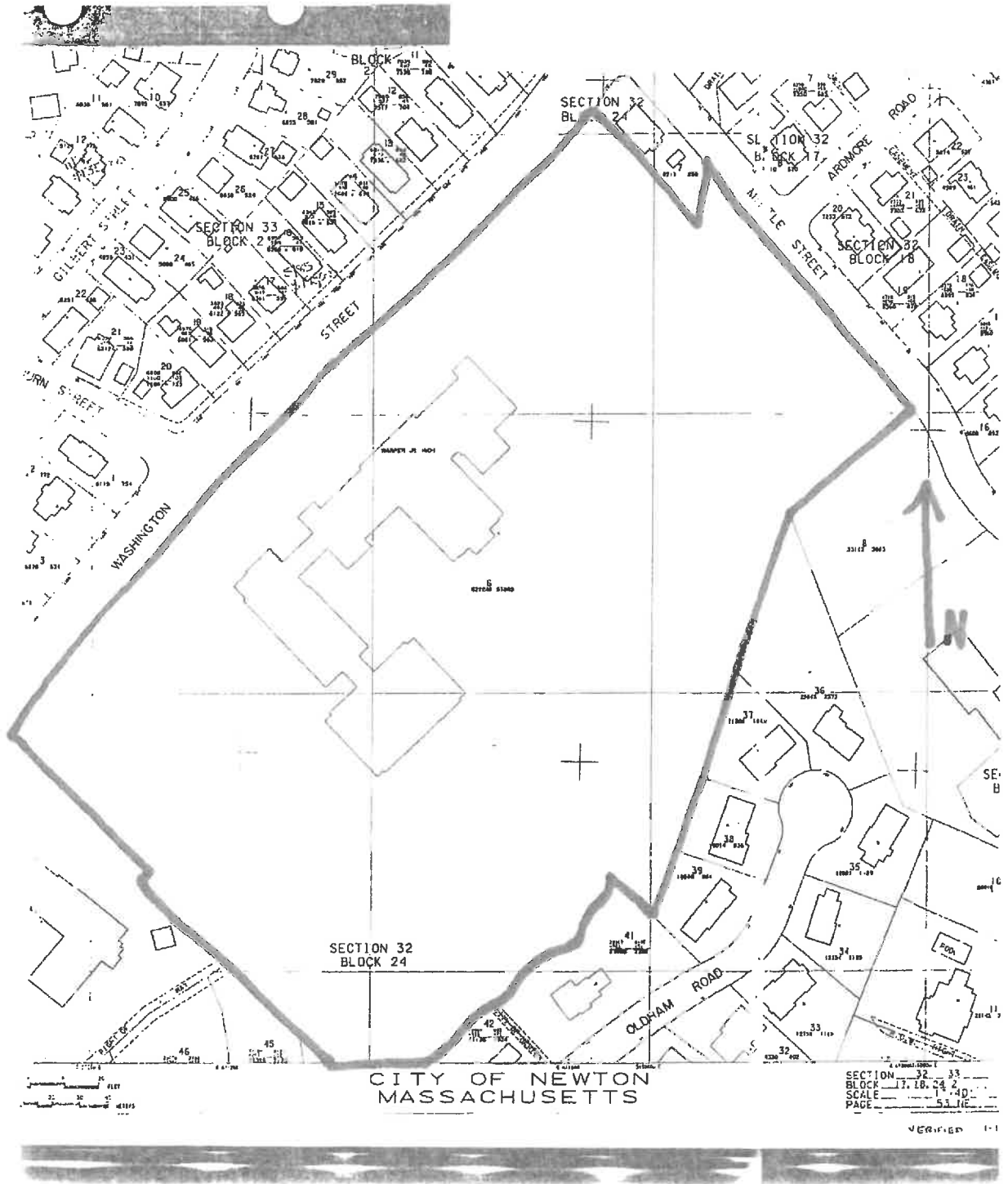
1600 Washington Street

SBL: 32-24-6

Assessors Map - Verified 1985

Page 53 NE

Scale 1"=40' Reduced 82 %



FORM B - BUILDING

MASSACHUSETTS HISTORICAL COMMISSION
 80 BOYLSTON STREET
 BOSTON, MA 02116

NOTE: MAP
 NWT 3890

NWT 3890

AREA

FORM NO.

2 W-0134



Newton (West Newton)
 1600 Washington Street
 Name Levi Warren Junior High School

Present vacant (1982)
 Original Junior High School

DESCRIPTION
 1927
 water & building dept. records

Georgian Revival

Architect Ripley & LeBoutillier

Exterior Wall Fabric brick

Outbuildings none

Major Alterations (with dates)

three story addition 1959

Condition poor (many broken windows)

Moved no Date n/a

Acreage 0.145

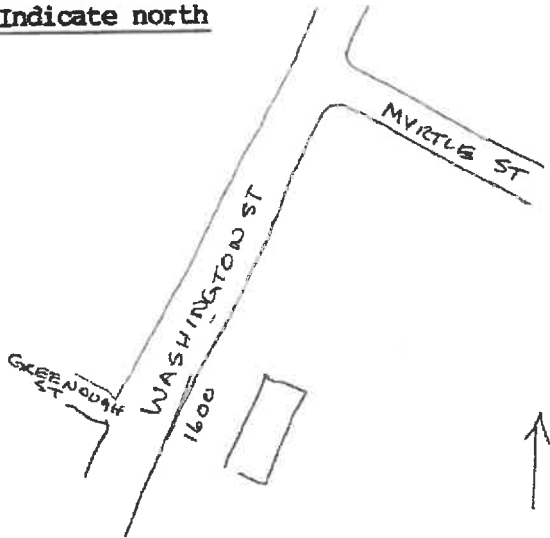
Setting major thoroughfare outside West
 Newton center and leading to western villages

Recorded by Candace Jenkins/Lusan Abele

Organization Newton Historical Commission

Date January 1987

Sketch Map: Draw map showing property's location in relation to nearest cross streets and/or geographical features. Indicate all buildings between inventoried property and nearest intersection(s). Indicate north



UTM REFERENCE _____

USGS QUADRANGLE _____

SCALE _____

NATIONAL REGISTER CRITERIA STATEMENT (if applicable)

ARCHITECTURAL SIGNIFICANCE Describe important architectural features and evaluate in terms of other buildings within the community.

The Warren School is the earliest, and by far the most interesting architecturally, of Newton's several Georgian Revival style public schools. It is a large, two story building with high basement structure which breaks up its long rectangular mass with imagination (compare with Carr School in Nonantum). The brick structure consists of a five-bay central section with pedimented frontispiece, cupola and bridged chimneys defining it above the roofline. Quoins offer further definition. This large central section, almost a school in its own right, is flanked by eight bay hyphens that are in turn terminated by blank, pedimented end pavilions. These end pavilions project beyond the front and rear elevations and contain secondary entries in brick porches on their ends (S & N). Quoins define these elements as do rusticated basements. A two story wing that appears to be original extends from the center of the rear (E) elevation. The integrity of the school is affected only by its vacant status and generally poor condition.

HISTORICAL SIGNIFICANCE Explain the role owners played in local or state history and how the building relates to the development of the community.

Between 1908 and 1919, there were no new schools built in Newton. However, housing sales were brisk and new building was up, particularly in the mid-teens. World War I slowed construction for several years, but between 1909 and 1919 school enrollment went from 7,236 to 8,623. New building hit a record high in 1925 and in the following decade the school population increased 27%. By 1939, enrollment in the Newton School System was just over 12,000 and the city had built 14 new school buildings.

Although the construction of a Junior High School in the West Newton area had been under discussion since 1922, the Levi F. Warren Junior High School was not built until 1926-7. At completion Warren was said to be "one of the most modernly equipped and constructed buildings," and praised for its ease of operation and low maintenance needs. Architects for Warren Junior High were Ripley and LeBoutillier, whose offices were at 45 Bromfield Street, Boston. Hubert Ripley, who began his career in the offices of Daniel Burnham, and Peabody and Stearns, was a Newton resident. Houses at 36 Birch Hill Road (his own) and 271 Chestnut Street were designed by him. Addison LeBoutillier, a native of Utica, New York, began his career in the offices of S. S. Beman of Chicago. He came to Boston in 1893 and became associated with Ripley by about 1913.

BIBLIOGRAPHY and/or REFERENCES

Building Records 1600 Washington Street
 School Committee Reports 1927, 1956
Newton Graphic 9/9/27, 3/3/82

NWT.3890

INVENTORY FORM CONTINUATION SHEET

MASSACHUSETTS HISTORICAL COMMISSION
Office of the Secretary, Boston

Community: Newton (West Newton)	Form No: WN-0134
Property Name: Levi Warren Junior High Sch.	

Indicate each item on inventory form which is being continued below.

HISTORICAL SIGNIFICANCE (con.)

A three story addition, built in 1959, was designed by the Architects Collaborative of Cambridge. Twenty-three years later, in 1982, Warren was closed due to declining enrollment throughout the city. Reuse of the building is still under discussion (1987).

The school was named for Levi F. Warren, a graduate of Bridgewater Normal School, who came to Newton in 1869. Warren was headmaster of the Peirce School in West Newton until his death in 1897.

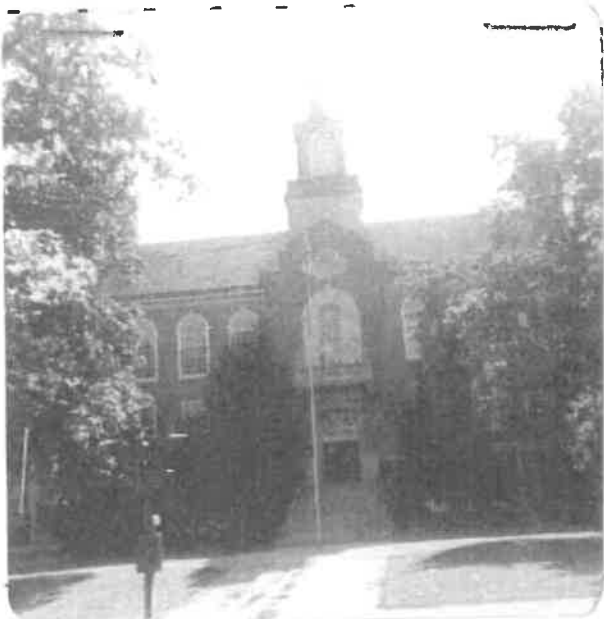
Staple to Inventory form at bottom

FORM B - BUILDING

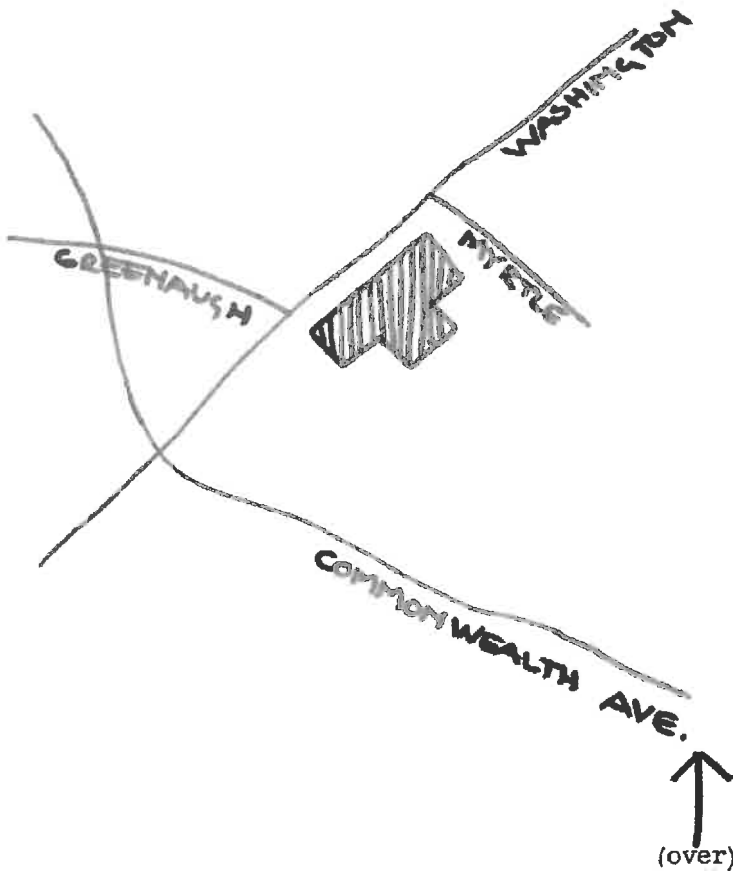
MASSACHUSETTS HISTORICAL COMMISSION
Office of the Secretary, State House, Boston

NWT-3890

In Area no.	Form no.
	3771 1939



4. Map. Draw sketch of building location in relation to nearest cross streets and other buildings. Indicate north.



1. Town Newton/West Newton
Address 1600 Washington Street
Name Levi F. Warren Jr. High
Present use Junior High School

Present owner Newton

3. Description:
Date 1927
Source librarian
Style vernacular/colonial revival
Architect _____
Exterior wall fabric red brick
Outbuildings (describe) _____
Other features t-shaped bldg.; 2 stories with raised basement; gable roof on main block with 2 side wings with flat roof with gable ends; gable entrance pavillion; double main portal with transom and decorative
Altered addition Date 1960
Moved _____ Date _____

5. Lot size:
One acre or less _____ Over one acre 1/4.
Approximate frontage 150-
Approximate distance of building from street 30'

6. Recorded by Marianne McLoughlin
Organization MAPC
Date 9/14/78

7. Original owner (if known) _____

Original use _____

Subsequent uses (if any) and dates _____

8. Themes (check as many as applicable)

- | | | | | | |
|-----------------------|-------|----------------------------|-------------------------------------|-------------------------|-------|
| Aboriginal | _____ | Conservation | _____ | Recreation | _____ |
| Agricultural | _____ | Education | <input checked="" type="checkbox"/> | Religion | _____ |
| Architectural | _____ | Exploration/
settlement | _____ | Science/
invention | _____ |
| The Arts | _____ | Industry | _____ | Social/
humanitarian | _____ |
| Commerce | _____ | Military | _____ | Transportation | _____ |
| Communication | _____ | Political | _____ | | |
| Community development | _____ | | | | |

9. Historical significance (include explanation of themes checked above)



10. Bibliography and/or references (such as local histories, deeds, assessor's records, early maps, etc.)

NWT. 3890

INVENTORY FORM CONTINUATION SHEET

MASSACHUSETTS HISTORICAL COMMISSION
Office of the Secretary, Boston

Community: Newton Center	Form No:
Property Name: Warren Jr. High	

Indicate each item on inventory form which is being continued below.

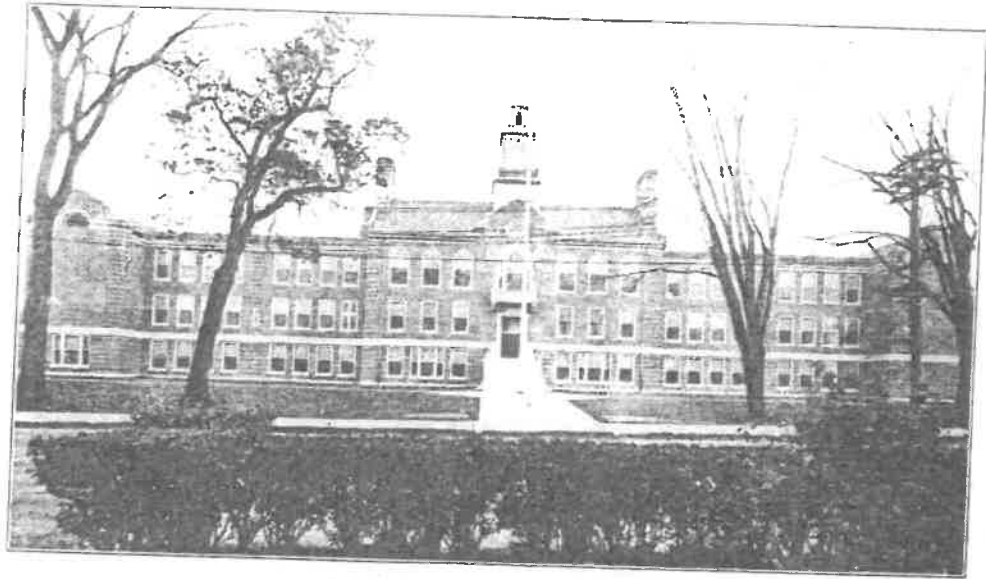
Other Features:

tive stone around it; small round window in entrance gable; large arched window above entrance portal with keystones and pilasters; balustrade in front of arched window; dentils and modillions along cornice; 2 large chimneys at either end of central pavillion; large arched windows on second floor of main pavillion with round brick arch and keystones; the rest of the bldg. has double hung sash windows with flat arches; beltcourse; cupula(boarded up) with weather-vane; brick quoins; decorative stone and scrolls on gable ends.

Staple to Inventory form at bottom

Oct. Reprint 1924

NWT 3890



LEVI F. WARREN JUNIOR HIGH SCHOOL

ATTACHMENT 8 –
BC STEWART & ASSOCIATES
CAPITAL NEEDS ASSESSMENT
(including photos)

19 June 2022



Revised Final Capital Needs Assessment Summary Report

Warren House

Newton, Massachusetts

BC Stewart & Associates

Pocasset, Massachusetts

INTRODUCTION

Pursuant to the terms of a contract between BC Stewart & Associates (BCSA) and the Newton Community Development Foundation (NCDF), an inspection of Warren House was conducted to evaluate existing conditions, identify any required repairs and compile the information necessary to complete a Capital Needs Assessment Summary Report. The grounds, buildings and dwelling units were inspected on the 18th of March 2022 by Karl Atkinson, representing BCSA. Karl Atkinson was accompanied by various representatives of the management company.

DEVELOPMENT PROFILE

Warren House is a 59 unit housing development on one site within a predominantly residential neighborhood in West Newton, on the southeast side of Washington Street, less than one quarter mile northeast of its intersection with Commonwealth Avenue and approximately one half mile southwest of the West Newton entrance to the Massachusetts Turnpike. The mildly sloping site is adjacent to City of Newton athletic fields. The site is improved with a 3 and 4-story former school building that was renovated and converted to housing in 1992. Local goods and services are not within walking distance of the development.

DEVELOPMENT NAME	Warren House				
ADDRESS	1600 Washington Street Newton, MA 02465				
SITE MANAGER	Ellie Namvar				
TELEPHONE/ EMAIL	617. 527. 6616				
PROPERTY MANAGER	Newton Community Development Foundation				
ADDRESS	425 Watertown Street, Suite 205 Newton, MA 02458				
CONTACT	Jeanne Strickland Executive Director 617. 244. 4035 / jstrickland@ncdfinc.org				
NUMBER OF SITES AND BUILDINGS	One site with former school building converted to residential use.				
DEVELOPMENT AGE	Renovated 1992. Capital improvements in 2010 and 2015.				
NUMBER OF PARKING SPACES	192 Spaces.				
EXTERIOR COMMON AREAS	Parking areas, walkways, gazebo, lawns				
INTERIOR COMMON AREAS	Hallways, stairways, office, community room, kitchen, laundry, gym.				
DWELLING UNITS	59				
Number of Vacant Units	Not reported				
Number of Accessible Units	3 Barrier Free Units.				
UNIT DISTRIBUTION	1 BR	2 BR	3 BR	4 BR	TOTAL
Standard Units	14	37	5	0	
Accessible (Barrier Free) Units	1	1	1	0	
TOTALS	15	38	6	0	59

Revised Final Capital Needs Assessment Summary Report
Warren House, Newton, Massachusetts

DATE OF PREVIOUS CNA	2014		
DATE OF 504/ADA ACCESS AUDIT	2019 (Accessibility Audit by KMA ARCHITECTURE).		
ENERGY AUDIT COMPLETION DATE	None reported		
KNOWN CODE VIOLATIONS	None reported		
SYSTEMS	IN PLACE	SERVICE CONTRACTOR	INSPECTION/REMARKS
BOILERS	Yes	ACCUTECH	Gas-fired
ELEVATORS	Yes	DELTA	
FIRE SUPPRESSION SYSTEM	Yes		Common areas & units
FIRE ALARM SYSTEM	Yes	KEYES/ATLANTIC	
SECURITY	Yes		Intercom system
WASTE DISPOSAL	Yes		Trash Chute and Compactor
LIGHTING		TYPE	CONTROL TYPE
SITE LIGHTING	Yes		
COMMON AREA LIGHTING	Yes	Mostly fluorescent	
DWELLING UNIT LIGHTING	Yes	Mostly fluorescent	Switch
HAZARDOUS MATERIALS			
ASBESTOS	Not reported		
LEAD BASED PAINT	Not reported		
UNDERGROUND OIL TANKS	No		
PCBS	Not reported		
RECENT CAPITAL IMPROVEMENTS			
One parking lot has been replaced. Exteriors repointed (2015), new roofs (2015), new awnings (2020) and privacy fences (2018). Common flooring has been replaced (2018). Approximately half of all of the dwelling units have been modernized with kitchen and bathroom renovations. The heating and hot water equipment has all been replaced. Fire alarm and elevator have been replaced.			
PROPOSED CAPITAL IMPROVEMENTS			
Management intends to replace the front canopy structure and to continue to modernize the remaining dwelling units.			
FUNDING			
For purposes of this report, it is our understanding that the site and building components listed below are funded as operation expenses and not through the replacement reserve account:			
LAWNS, PLANTINGS UNIT INTERIOR ENTRY DOORS UNIT INTERIOR DOORS UNIT CLOSET DOORS	SCREENS CURTAINS, WINDOW SHADES UNIT INTERIOR PAINTING KITCHEN FAUCET SET	BATHROOM FAUCET SET UNIT CONTROLS/THERMOSTATS SMOKE/HEAT DETECTOR HEADS UNIT LIGHTING FIXTURES COMMON AREA LIGHTING FIXTURES	

INSPECTION SUMMARY

The report includes a summary of our findings, a brief narrative section, photographic documentation and a 20-year needs improvements plan.

Site conditions, building surfaces, interior common areas, mechanical and equipment rooms, and the following dwelling units were visually inspected during the site inspection. The areas, building and dwelling units sampled are reportedly representative of conditions in the development.

UNIT #	BUILDING #	FLOOR	BATHROOMS	OCCUPIED	VACANT
P05	Warren House	4	1		X
307	Warren House	3	1.5	X	
322	Warren House	3	2	X	
213	Warren House	2	2	X	
220	Warren House	2	1	X	
205	Warren House	2	1	X	
102	Warren House	1	2	X	
110*	Warren House	1	2	X	
113	Warren House	1	2	X	
115	Warren House	1	2	X	
218*	Warren House	2	1	X	

* designated as accessible to residents with disabilities

** no access

CRITICAL ITEMS

Critical Items are categorized of two types: life safety remedies that correct exigent health and safety deficiencies including obstacles to ingress or egress from the units, buildings or the site, which deficiencies must be corrected before endorsement; and accessibility remedies for violations of one or more of the accessibility statutes as may apply to the property or to any of the buildings, which remedies must be completed as soon as possible, a time period specified as a number of months which may extend beyond endorsement but shall not exceed 1 year unless specifically permitted by HUD. Please refer to the accessibility section of this report for full requirements. Please note that some accessibility costs may be included in the replacement schedule category, through natural replacements of building components when exceeded their standard expected useful life. These would be shown in year 1.

Some areas of small improvements are required to bring the property into full compliance with accessibility standards. These are listed below.

NON-CRITICAL ITEMS

Non-critical Items are repairs, replacements or alterations that address current and imminent physical needs, notwithstanding whether any such needs may be described as deferred maintenance. Imminent in this context means work reasonably expected to be needed within the first year of the mortgage, except that this shall not be construed as requiring as an immediate repair any work that would normally occur at unit turnover. Non-critical repairs may include work likely to improve or enhance the quality, suitability, marketability and operating efficiency of the property. Non-critical repairs must be completed within 1 year after endorsement unless specifically permitted by HUD.

None Identified.

SITE IMPROVEMENTS

Site Surface and Landscaping

The site is generally flat and located in a suburban residential environment of Newton, Massachusetts. Underground utilities include water, sewerage, natural gas and electrical service. The development is well landscaped with lawns, shrubs and mature trees. Curb appeal at the development is very good and the site is well-maintained. There is a wood-framed gazebo at the back of the building. The gazebo is on an accessible route and in generally in good condition. Maintain the gazebo as needed through the operating budget. There is a playground at the back of the building. The play equipment includes wood and plastic equipment. The playground surface is wood-chips and the wood perimeter components exhibit wear. There is a painted wood-framed development sign at the front of the development. The sign does not have equal housing or accessibility symbols. Install these signs as needed through the operating budget.

Replacement Action and Timing

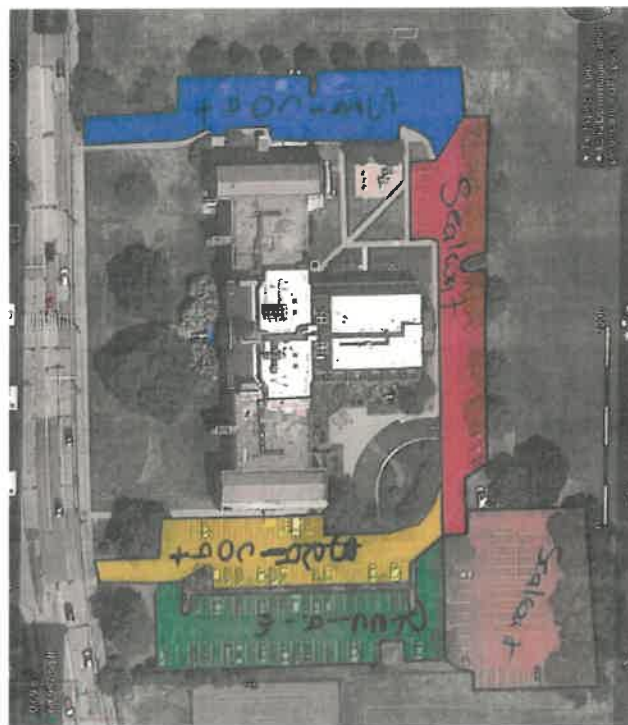
- We have included costs in the near term to replace the perimeter wood timbers at the playground. Replacement of the playground equipment is not anticipated.

Parking Areas

There is a parking area at the sides and back of the building and are identified as Yellow, Green, Red (1 + 2) and Blue (please see color-coded map showing areas). Site management reported that ALL surfaces were resurfaced between 2015-2017. The west parking lot surface appears to have a much better surface than the remaining areas. In general, conditions vary widely. **Per direction of the client, all surfaces are shown with a system age of 5.** The accessible parking spaces have a compliant width and access aisle. Signage includes both painted and a pole-mounted type.

Replacement Action and Timing

- We have included costs toward the end of the plan to resurface all of the parking areas. Interim costs to crack-fill, seal, and restripe the parking lots are shown every five years. Any interim repairs are shown as an operating expense.



Pedestrian Walkways

Concrete walkways are located around the building. Some of the slabs exhibit cracks and some of the integrated formed concrete curbs exhibit wear and spalling at the edges. Flared concrete curbs were noted at the main pick-up and drop-off area and at the parking access aisles. Brick paved walkways are located at the main entrance and at the gazebo. The brick sections are in good condition.

Replacement Action and Timing

- We have included costs twice in the plan to replace damaged sections of the concrete.
- **ACCESSIBLE ITEM:** We have included costs to install a walkway to the playground.

Fencing and Retaining Walls

Four-foot high vinyl coated chain-link fencing was noted at the back of the building. The chain-link fencing appears to be older and exhibits some peeling paint. There is a stone retaining wall at the west side of the development. The wall is in variable condition for its age and needs some repairs.

Replacement Action and Timing

- Costs to replace the chain-link fencing is shown in the near term.
- We have included an allowance in Year 1 for stone retaining wall repairs.

BUILDING EXTERIOR

Structure and Exterior Walls

The building has concrete foundations, solid brick exterior walls. Formed concrete bands are located around the building and decorative consoling were noted at the gable/eaves of the sloped roof sections. The foundation appears to be in good condition. Management reported that the exteriors were substantially repointed during the 2015 renovations. It appears that all of the window lintel areas have been repointed. There are some areas with receding mortar joints and some of the bricks exhibit efflorescence, especially at the chimney at the back. There is a set of large stairs at the front of the building. The stairway and railings are in good condition. Some mismatched mortar work was noted at the south wing (predated the 2015 masonry repairs). The balconies feature rubber floor mats, fixed canvas awnings and six-foot high PVC privacy fences. Replace the rubber mats as needed through the operating budget. The awnings and privacy fences were all recently replaced. One of the patios has wood components. There is a wood-framed canopy at the main entrance to the building. The canopy is original and is in variable condition. The wood support posts exhibit water damaged sub-surface material.

Replacement Action and Timing

- We have included costs in the twice in the plan for repointing areas of the brick exterior.
- Costs to replace the entire main canopy at the front of the building are shown in the near term.
- Costs to replace the awnings are shown in the second half of the plan.

Roof Coverings

The center portion of the roof system is comprised of a flat structure, decking, insulation TPO covering installed. The north east and south west wings have slates installed. The TPO roof covering and slate coverings were replaced in 2015. No slipped or missing slates were noted. Some areas of EPDM rubber membrane that cover the mechanical ductwork were noted in select areas. Rainwater drainage is provided by a mix of internal drains and exterior copper box gutters at the front. No problems were observed or reported with the rainwater drainage systems and no costs are shown. There is a metal clad decorative cupola at the center of the building. The cupola has large window openings and a small spire. Maintenance of the cupola is shown as an operating expense. There is a roof-top wood-framed stair structure that is used to provide access to all areas of the flat roof. The roof stairs exhibit some sagging decking material. The roofs and balconies have fixed safety rails installed and are in good condition.

Replacement Action and Timing

- We have included costs toward the end of the plan to replace the roof covering. The slate roof coverings should be monitored going forward but no capital costs are shown.
- We have included a modest allowance to replace the roof service stairs

EXTERIOR AND INTERIOR DOORS

Common Areas

The main entrance to the building has two sets of automated steel-framed glass doors installed in a glazed curtain wall. The wall assemblies also have painted steel frames. The automatic door opening devices have been replaced. The door has a compliant clear opening and lever hardware. There is a set of double-leaf flush steel service doors at the back of the building that are used for trash removal. The doors appear to be in fair condition. Various other doors are located around the building and generally in good condition. Exterior unit doors are located at the balconies and patios. Interior common area doors have a 33-inch clear opening and lever hardware installed. Trash room doors have lever hardware. All of the interior doors are in good condition and no capital costs are shown with regards to them.

Replacement Action and Timing

- We have included costs starting later in the first half of the plan to replace the exterior doors.

Dwelling Units

Unit entry doors are painted steel and have a paneled finish and lever hardware installed. Interior passage doors are solid-core wood, have a paneled finish and have turn style door-knobs. The closet doors are hollow-core wood and the bi-fold type. The doors at the accessible units have a compliant clear width and lever hardware. The doors have a lowered peep-hole installed. Any replacement of the unit doors is shown to be met through the operating budget.

WINDOWS, ROOF WINDOWS AND WINDOW TREATMENT

Windows, insulating glass, screens and window treatment are included in this section of the report. The window frames are painted wood (20 over 20) and have individual double glazed lites. Some of the window openings have arched headers. During the walkthrough a significant number of lites appeared to be fogged. Vinyl screens are installed on the outer side of the frames. The windows are adequately sized to provide compliant ventilation and natural light in the rooms served. The window frames in the sampled units and common areas were in acceptable condition. Window shades (accordion type on tracks) are located at the openings. Unit 307 has new blinds installed and maintenance staff reported that they intend to install similar blinds throughout the development. Skylights are installed. During the walkthrough, one of the skylights was noted to be leaking. These were reported to be replaced.

Replacement Action and Timing

- We have included costs in the near term to replace the window frames. Costs for maintenance and replacement of any fogged glass is shown in the second half of the plan.
- Installation of shades are shown over the first three years of the plan.

EXTERIOR AND INTERIOR FINISHES

Common Areas

Interior common area walls are gypsum wallboard and have a smooth painted finish. Some walls have exposed brick and are in good condition. The ceilings are also painted GWB. Finishes were noted to be in good condition. The entrance lobby area has a new vinyl plank floor covering. The hallways have carpet tile installed and was reportedly recently replaced. Areas of wear were noticeable on high traffic areas such as the stair treads and center areas of the hallways. The carpet tile was noted at the end wings of the building and are in good condition. The original stairways have a mix of stone surfaces and carpet (spiral). All railings are metal and in good condition. The community room, gym and restroom also has similar vinyl plank floor covering installed. The trash rooms have VCT installed.

Replacement Action and Timing

- We have included a modest allowance in the second half of the plan for interior common area painting.
- Costs to replace the hallway rolled carpet is shown after 10 years of life. Interim cleaning is shown as an operating expense.

Dwelling Units

Dwelling units include smooth painted walls and ceilings. Painted surfaces in the units sampled were in satisfactory condition. Management provided limited information regarding painting and reported that the units are painted when needed or on unit turnover. Future unit painting should be undertaken accordingly and shown to be funded through the operating budget. The units typically have vinyl plank in the living areas and carpet in the bedrooms. Some staining was noted in several of the sampled units. Other sampled units had new floor finishes and are in good condition. The kitchens have a mix of resilient and vinyl plank floor coverings. Finishes were noted to be in fair to good condition. The bathrooms have ceramic tiled floor finishes installed. Replacement of the ceramic tiled floors is not anticipated.

Replacement Action and Timing

- We have included costs through the plan to replace the living area flooring.
- Kitchen flooring is shown to be coordinated with replacement of the kitchen cabinet sets. Replacement of the newer kitchen floors are shown starting later in the plan.

KITCHEN COUNTERS, CABINETS, SINKS, FAUCETS

Dwelling unit counters, cabinets, sinks and faucets are included in this section of the report. We recommend that cabinets, counters and sinks be replaced simultaneously whenever possible, as part of a kitchen upgrading program for the development. According to management records, approximately 42 kitchen cabinet sets have been replaced within the last 5 years with 17 kitchen cabinet sets remaining to be replaced. The newer kitchen cabinets have solid wood face frames with solid wood door and drawer fronts. The countertops are solid surface (CORIAN or similar). The sinks are stainless steel and have a single bowl. The faucets have a single lever handle installed.

The kitchens in the accessible units are arranged in a galley or “U”-configuration and have a 60-inch turning diameter at 12 inches off the floor. Most of the wall cabinets have the shelves mounted at 55 inches high, although the wall cabinets in unit 218 are within 54 inches high. Some of the accessible kitchens have knob hardware installed on the door and drawer fronts. The countertops are positioned at

35 inches high and have a clear knee space at the sink and cook-top. The sink has a single shallow-depth stainless steel bowl. The faucets have a single lever handle. The under countertop piping does not have any protective wrap installed.

Replacement Action and Timing

- We have included costs over the first three years to replace the remaining kitchen cabinets, countertops and sinks. Replacement of the newer cabinets are shown starting at the end of the plan.
- **ACCESSIBLE ITEM:** The highest wall shelf should be installed within 54 inches. Management should also ensure the countertops in the accessible units are installed no more than 34 inches.

KITCHEN APPLIANCES

Kitchens sampled included replacement appliances. An appliance replacement schedule was not presented for review. Management should ensure that the kitchen appliances are purchased from a single manufacturer so that benefits from economies of scale and the use of similar replacement parts are achieved. The ranges are 30 inches wide and have four electric burners. Combination microwave and recirculating hoods are located above the ranges. The refrigerators are the standard residential type and have a 16 cubic-foot capacity. The refrigerators are by AMANA and GENERAL ELECTRIC. Dishwashers are also provided. Disposal units are also installed. Replacement of the disposals is shown as an operating expense.

The accessible units have a cook-top and a wall-oven installed. The wall ovens have a bottom hinge and the highest control installed at 55 inches high. The cook tops have the controls at the side. The range hoods have remote switches installed in the appropriate locations and within acceptable reach ranges. The combination microwave has the controls installed beyond reach ranges. The refrigerators are the side-by-side type.

Replacement Action and Timing

- We have included costs to replace the appliances concurrent with kitchen cabinet replacement.
- Costs to replace the newer appliances are shown after a standard expected useful life of 20 years (for the ranges), 15 years (for the refrigerators, microwaves and dishwashers).
- Replacement of the disposals is shown as an operating expense.

BATHROOMS

Many of the units have an additional half or full bathroom. Approximately half of the bathrooms have been modernized. The newer bathrooms feature an enameled steel tub with a tiled surround (subway tile). The surrounds have a mixing and diverting valve installed on the foot wall. The bathrooms have a contemporary vitreous china lavatory installed on a solid wood vanity (newer ones match the newer kitchen cabinets). The lavatory faucets have a single lever handle and an aerator installed. The toilets have a 1.6-GPF and have a wall discharge outlet. The bathrooms have standard accessories installed.

The accessible bathrooms have an enameled bathtub with cut-out, although a roll-in stall was noted at unit 113 and 218. The bathtub surround does not have any grab bars or a temporary seat. The lavatories are vitreous china and are the elongated wall-mounted type. The lavatories are mounted with adequate knee clearances. The faucet has double paddle faucet handles. Some of the sampled under lavatory pipes do not have protective pipe-wrap installed. The toilets have seat height at 17.5 inches high and

have the flush handle located on the open side. Bathroom accessories include a lowered mirror, a toilet paper holder (mounted at 19 inches high and behind the front of the toilet), and grab bars. The side grab bars at the toilets do not meet accessibility requirements.

Replacement Action and Timing

- We have included costs through the plan for tub reglazing.
- Costs to replace the older lavatories and vanities over the first half of the plan.
- **ACCESSIBLE ITEM:** Management should ensure that the bathtubs and toilets have compliant grab bars. In addition, the toilet paper holders need to be relocated and protective wrap be installed under the lavatories.

PLUMBING AND DOMESTIC HOT WATER (DHW)

Water to the development is furnished from public water sources. The incoming water line has a meter, backflow preventer and a ball-type shut-off valve. Building sanitary waste and vent systems are configured in risers to the roof. Waste and vent systems are in satisfactory condition. There is a central mechanical room that houses all of the heating and hot water equipment. Domestic hot water (DHW) is generated by a RAYPACK gas-fired boiler (model# H3-0824 and rated at 825-MBH) and stored in three (3) AO SMITH 200-gallon indirect-fired tanks. All of the storage tanks were replaced in 2020. The DHW system has an in-line ARMSTRONG and RED BARON stainless steel circulator installed and a LEONARD thermostatic three-way valve installed.

Replacement Action and Timing

- We have included costs in the second half of the plan to replace the DHW boiler and three-way valve. Interim maintenance is shown as an operating expense.
- Costs to replace the DHW storage tanks are shown toward the end of the plan after a standard useful life of 20 years.
- DHW pump replacement is shown in the second half of the plan.

A monitoring and maintenance program is in place to ensure proper operation of all valves and fittings. Management should continue its preventive maintenance system to maintain components of the domestic cold and hot water system in satisfactory operating condition and have the systems serviced regularly by the development's service contractor.

ELEVATORS

There is a single hydraulic elevator that serves each floor of the building. The hall call buttons are installed within acceptable reach ranges and the lobby door opening has a digital floor number and directional arrows installed. The elevator cab has a 2,500-lb capacity and a 110-FPM travelling speed. The cab has stainless steel and particleboard wall coverings. The floor has a new vinyl plank installed. The cab finishes were recently upgraded. The highest cab control is installed within acceptable reach ranges. All of the buttons have raised numbering and Braille installed. The elevator cab has a fireman's override function installed. The elevator machine room has air conditioning installed and an adequately sized ventilation grille. The elevator machinery was replaced in 2021. Replacement of the elevator machinery is not anticipated during the term of this plan.

Replacement Action and Timing

- Costs to upgrade the cab finishes are shown in the second half of the plan.

HEATING, COOLING, VENTILATION (HVAC)

There is a central mechanical room that houses all of the heating and hot water equipment. Heating water is generated by two (2) LOCHINVAR (CREST) natural gas-fired high efficiency boilers (model# FBN1251). Each boiler has a 1,250-MBH rating and were installed in 2016. We have shown the boilers having an extended useful life of 30 years and replacement is not included in the plan. Interim repairs are shown as an operating expense. Heating water is distributed around the development two (2) base-mounted BELL & GOSSETT, 15-HP pumps. The pumps have been upgraded with a pair of variable speed BELL & GOSSETT controller modules. It is assumed that these controller modules were installed during the boiler upgrade.

The dwelling units are heated and cooled by a vertical WHALEN fan-coil unit. Maintenance staff reported that the preventative maintenance includes unclogging the drains. Maintenance staff are also replacing the thermostats and that they have been replacing two (2) motors per year. The unit heat is controlled by a wall-mounted thermostat.

There are three (3) rooftop gas-fired make-up air units that provide heated air to the common areas. All of these air handlers are original and exhibit rust on the outer jacket. Cabinet fan-coil heaters were also noted in the hallways. There is a rooftop chiller by YORK and is rated at 141 tons of cooling. The chiller was installed in 2010. The chiller has five compressors and 8 fans. Some weathered insulation was noted on the chiller components. There is a ductless AC system that serves the elevator machine room. This system was installed with the elevator upgrade.

Replacement Action and Timing

- We have shown costs starting in the second half of the plan for full replacement of the WHALEN units after an extended useful life of 45 years. Interim costs to overhaul the fan coil units and replacement of the motors is shown in the near term.
- Costs to replace the rooftop units are shown in the near term.
- Replacement of the chiller is shown after a standard useful life of 25 years. Interim replacement of the compressors is shown as an operating expense.
- Costs to replace the Ductless AC unit is shown in the second half of the plan.

Management has a service contract with a local HVAC contractor for its air handling and AC equipment. We recommend that management continue its preventive maintenance program and develop a replacement schedule for common area HVAC equipment. We have included a contingency allowances herein upgrading/replacement as may be required during the reporting period.

WASTE DISPOSAL

The development has a compactor installed in the service area of the building. The dumpster appears to date to the last renovation and exhibits some rust on the outer housing. The compactor is also under a full service contract with WILLCO. There are two (2), two cubic-yard rolling dumpsters at the property that are leased from REPUBLIC SERVICES.

Replacement Action and Timing

- We have included costs in the near term to replace the compactor. Maintain the dumpsters as needed through the operating budget.

ELECTRICAL

Electric power is furnished via underground distribution lines. The main electrical panel is by WESTINGHOUSE. No problems were observed or reported with regards to the electrical systems. The dwelling units have individual circuit breaker panels by WESTINGHOUSE installed. The panels include 15 and 20-Amp single-pole breakers and a 50-Amp two-pole breaker installed. Some gaps were noted between the sampled breakers and face plate. The dwelling units have ground fault circuit interrupter (GFCI) outlets installed in the kitchens and bathrooms. The circuit breaker panels in the accessible units have the highest circuit breaker installed at 49 inches high. The power outlets and light switches are installed within acceptable reach ranges. Emergency electrical power is supplied by an emergency generator. The generator appears to be original and exhibits rust on the outer jacket. The generator has a .75 KVA/60 KW rating with 283 hours on the running clock. The generator is serviced by ASNE.

Replacement Action and Timing

- We have included costs in the first half of the plan to replace the generator.

Fire Alarm

There is a central fire alarm control panel by NOTIFIER. The alarm panel and annunciator are located in the main lobby area. The entire fire alarm system was reportedly recently replaced and future replacement is not anticipated during the term of this plan. Hardwired smoke detectors, fire alarm pull stations and horn and strobe devices are located throughout the development. The dwelling units have hardwired smoke detectors installed in the living rooms and bedrooms. There are carbon monoxide detectors (CO) installed in the common areas or the dwelling units. The building has a wet sprinkler system installed with coverage in the common areas and the dwelling units. The incoming water line that serves the sprinkler system has a double-check backflow preventer installed. No problems were noted with regards to the smoke or fire detection devices. They should be maintained as needed through the operating budget. Horn and strobe devices are installed throughout both of the accessible units.

Management should continue to maintain all equipment and fixtures associated with the fire and life safety system in proper working order, and continue to have the service contractor conduct testing procedures at regular intervals, in accordance with all local and state fire and life safety regulations.

Lighting

Exterior lighting is provided by light fixtures at the points of entry. The common areas have a mix of wall-mounted sconces and ceiling-mounted dual-lit fluorescent fixtures. Illuminated exit signs (red) are installed in the appropriate locations. The dwelling units have standard residential grade light fixtures installed. Replacement of the light fixtures is shown as an operating expense.

Signaling and Communication

There is a main intercom panel by MIRCUM at the front of the development. The two-way intercom panel has a digital dialer and a printed directory. The intercom panel was reportedly replaced in or around 2018. Future replacement is not anticipated during the term, of the plan. There are

approximately ten (10) cameras located around the building.

Replacement Action and Timing

- We have included an allowance halfway through the plan to upgrade the security system.

OTHER

Discussion related to furniture, mailboxes, laundry rooms and accessibility compliance are included under this section, as follows

Restrooms

The development has two common-use restrooms. The accessible restroom has a 60-inch turning diameter and a compliant approach to the plumbing fixtures. The lavatory is wall-mounted and has a compliant knee space and surface height. The faucet has a single lever handle. The under lavatory pipework has protective wrap installed (since the walkthrough). The toilet has a seat at an acceptable height and the flush handle is located on the closed side. The grab bars are 42 inches long and positioned within 12 inches from the corner of the room. The toilet paper holder is positioned that meets requirements. The restroom has a lowered mirror. Maintain the restroom as needed through the operating budget.

Community Room Kitchen

There is a community room kitchen at the development. During the walkthrough, the kitchen has been removed in preparation of it being replaced. Management reported they intend to construct a new kitchen and to be funded through outside sources. No capital costs are shown. Management should ensure that the kitchen fully meets accessibility requirements.

Laundry

There is a central laundry room located at the development. There are six (6) front-loading washing machines and six (6) dryers. The laundry appliances are operated by pre-paid cards. The laundry room and equipment are managed by a laundry service contractor. Equipment replacement is the responsibility of the service contractor. No action related to capital improvements is required or included during the reporting period.

Gym

There is a gym located at the development. The gym equipment includes various running and cycle machines. Replace the gym equipment as needed.

Mailboxes

There is a wall-mounted recessed vertical mailbox facility located in the lobby. The mailboxes measure 6x5 and are in fair condition. Management reported that they would like to replace the mailboxes.

Replacement Action and Timing

- We have included costs in the near term of the plan to replace the mailboxes.

ACCESSIBILITY

The development in its entirety is considered partially accessible to residents and visitors with disabilities. We recommend that management take the appropriate steps necessary to attain, to the greatest extent possible, a substantial level of accessibility to and in the vicinity of public areas and dwelling units, as required by the recommended uniform federal accessibility standards and current local regulations.

Any recommended improvements to building components that affect accessibility should be those that are readily achievable, technically feasible, and satisfy overall local, and developmental needs and housing goals. All improvements should be executed in a professional manner, adhering to all applicable laws, codes and regulations, including, and not necessarily limited to the Fair Housing Act (FHA), Uniform Federal Accessibility Standards (UFAS), the Americans with Disabilities Act (ADA), and the Commonwealth of Massachusetts Rules of the Architectural Access Board (MAAB).

The main discussions relating to specific component heights/dimensions etc, is in their appropriate sections above. Below is a summary of items that were brought to our attention. Concerns related to accessibility include the following:

Common Areas

- We have included costs to install a walkway to the playground.

Dwelling Units

It is understood that 3 of the 59 units are designated as accessible to individuals with disabilities. Concerns related to dwelling unit accessibility include the following:

- The highest kitchen wall-shelf and wall-oven should be installed within 54 inches (55 inches recorded in unit 110. Wall oven at 55 inches in unit 115). Management should also ensure the countertops in the accessible units are installed no more than 34 inches (35 inches at unit 110).
- Management should ensure that the bathtubs and toilets have compliant grab bars. In addition, the toilet paper holders need to be relocated and protective wrap be installed under the lavatories.

We recommend that management have the Section 504/ADA review, analysis and transition plan updated prior to making any accessibility related modifications. In addition to common-use area upgrading, management should ensure that modifications required to satisfy compliance standards for mobility impaired residents (unless required by other regulations, 5% of the total 59 units = 3 units) and for hearing and sight impaired residents (unless required by other regulations, 2% of the total units = 2 units) are undertaken if technically feasible and economically achievable.

END OF NARRATIVE SECTION

Final Capital Needs Assessment Summary Report
Warren House, Newton, Massachusetts



1. View of the parking lot at the back of the building.



2. View of the entrance paved area. Note that the over-flow parking lot appears to be newer.



3. Typical view of the accessible parking areas at the side of the building.



4. View of the concrete walkways. Some areas of the concrete exhibits cracks and the curbs exhibit some damage.



5. Typical view of the privacy fences. Good condition.



6. View of the playground at the back of the building. The playground is not on an accessible route.



7. View of the main entrance at Warren House.



8. Some areas of the brickwork have been repointed. Some areas are in need of repointing.



9. View of the front of the building. Decorative cast masonry in good condition.



10. Window frames include a mix of decorative wood and aluminum. Some fogged lites noted.



11. View across the TPO roof covering.



12. View of the slate roof covering. Good condition.

Final Capital Needs Assessment Summary Report
Warren House, Newton, Massachusetts



13. View of the main lobby and main entrance doors. The vinyl plank was recently installed.



14. View of the hallway carpet. The carpet has been replaced although stains noted.



15. Carpet tile is in good condition.



16. View of the stairways.



17. View of the laundry room. New vinyl plank floor.



18. View of the common-use restroom.



19. Typical view of the dwelling unit interior passage and closet doors.



20. View of living area floor coverings.



21. Typical view of the newer kitchen cabinets.



22. Typical view of the older kitchen cabinets.



23. Typical view of an accessible kitchen.



24. Another view of an accessible kitchen.



25. Typical view of a standard bathroom.



26. Another view of a standard bathroom.



27. View of an accessible unit bathroom.



28. Another view of an accessible unit bathroom.



29. Typical view of a vertical WHALEN unit that provides heat and air conditioning to the units.



30. Typical view of the unit circuit breaker panels.



31. View of the main electrical panel.



32. View of the original emergency generator.



33. View of the incoming water and sprinkler lines. Both have double check backflow preventers installed.



34. View of the central fire alarm panel. The panel was recently replaced.



35. View of the trash compactor.



36. View of the elevator pump unit.



37. View of the main heating boilers. All replaced.



38. View of the heating and chilled water circulators. Good condition.



39. View of the domestic hot water (DHW) system.



40. View of the DHW mixing valve.



41. View of the rooftop chiller.



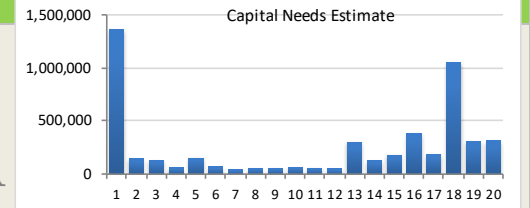
42. View of the rooftop HV units that provide common area space heating.

Capital Needs Assessment (Budgeted 20-year Component Replacement Costs)

BC Stewart & Associates, Pocasset, Massachusetts

development: **Warren House**
 date: **19th June, 2022**
 location: **Newton, MA**
 project age: **Renovated 1992, Major system upgardes 2016**
 number of buildings: **1**
 number of dwelling units: **59**

CB = Construction Budget
IAR = Immediate and Accessibility Repairs
CI/NCI = Critical and Non-Critical Items
Replacement Schedule (RS) Codes
1 100% in 1 year **3** 33% over 3 years **5** 20% over 5 years **10** 10% over 10 years
2 50% over 2 years **4** 25% over 4 years **20** 5% over 20 years



category	replacement item	quantity	unit	cost per item	total cost	age	avg	replacement years				RS	infi	Costs not incl.	Year	Year	Year	Year	Year	Year	Year	Year	Year	Year	Year	Year	Year	Year	Year	Year								
								1	2	3	4				5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20								
14	ELECTRICAL																																					
14 1	Electrical Main Switchboard	1	ea			30	65	35	100	165	230	1	3%																									
14 2	Electrical Wiring	59	un			30	65	35	100	165	230	1	3%																									
14 3	Unit Electrical Panels	59	ea			30	65	35	100	165	230	1	3%																									
14 4	Emergency Generator	1	ea	75,000.00	\$75,000	30	35	5	40	75	110	1	3%																									
14 5	Sprinkler System	1	ea			30	65	35	100	165	230	1	3%																									
14 6	Fire Alarm Panel and End Devices	1	ea			4	25	21	46	71	96	1	3%																									
14 7	Unit Smoke Detectors	59	un			Var	10	10	20	30	40	1	3%																									
14 8	Site Lighting	13	ea			<10	25	25	50	75	100	1	3%																									
14 9	Exterior Building-mounted Lighting	32	ea			Var	25	25	50	75	100	1	3%																									
14 10	Interior Common Area Lighting	1	ls			Var	25	25	50	75	100	1	3%																									
14 11	Emergency Lighting	1	ls			Var	15	15	30	45	60	3	3%																									
14 12	Dwelling Unit Lighting	59	ea			Var	25	25	50	75	100	1	3%																									
14 13	Intercom Panel	1	ea			4	25	21	46	71	96	1	3%																									
14 14	Security Systems (10 cameras)	1	ls	10,000.00	\$10,000	Var	20	1	21	41	61	1	3%	10,000																								
14 15	Data/Communications	1	ls			-	25	25	50	75	100	1	3%																									
15	OTHER																																					
15 1	Common Kitchen (Funded from outside sources)	1	ea			ADD	25	1	26	51	76	1	3%																									
15 2	Common Restroom Fixtures	1	ls			<20	30	30	60	90	120	1	3%																									
15 3	Gym Equipment	1	ls	5,000.00	\$5,000	Var	10	5	15	25	35	1	3%																									
15 4	Mailboxes	59	un	175.00	\$10,325	30	30	1	31	61	91	1	3%	10,325																								
15 5	Accessible Item: Dwelling Units (5%)	3	ea	1,500.00	\$4,500	ADD	50	1	51	101	151	1	3%	4,500																								
15 6	Accessible Item: Dwelling Units (2%)	2	ea			??	50	50	100	150	200	1	3%																									
TOTAL ALL														Inflated Dollars:	1,366,533	146,641	133,662	63,967	160,710	67,804	44,423	57,369	59,090	69,300	60,873	52,317	307,182	129,220	186,413	386,022	192,465	1,051,963	318,656	315,885				
														Current Dollars:	1,366,533	142,370	125,989	58,539	142,789	58,489	37,204	46,646	46,646	53,113	45,295	37,795	215,451	87,992	123,241	247,773	119,938	636,455	187,177	180,145				
Cumulative Needs over 20 years														1,366,533	1,513,174	1,646,836	1,710,803	1,871,513	1,939,318	1,983,741	2,041,109	2,100,199	2,169,499	2,230,372	2,282,689	2,589,871	2,719,091	2,905,504	3,291,527	3,483,992	4,535,955	4,854,611	5,170,496					
Total Cumulative Needs over 20 years														\$5,170,496	<i>in inflated dollars</i>		Years 1-5: \$1,871,513																					
Cost per dwelling unit over 20 years														\$87,636	<i>in inflated dollars</i>																							
Costs that are not included in the reserve analysis (CI / NCI / CB / IAR)																																						

Replacement Reserve Analysis

PLAN ONE

Current Scenario

BC Stewart & Associates, Pocasset, Massachusetts

development: **Warren House**
 date: **19th June, 2022**
 location: **Newton, MA**
 project age: **Renovated 1992, Major system upgrades 2016**
 number of buildings: **1**
 number of dwelling units: **59**

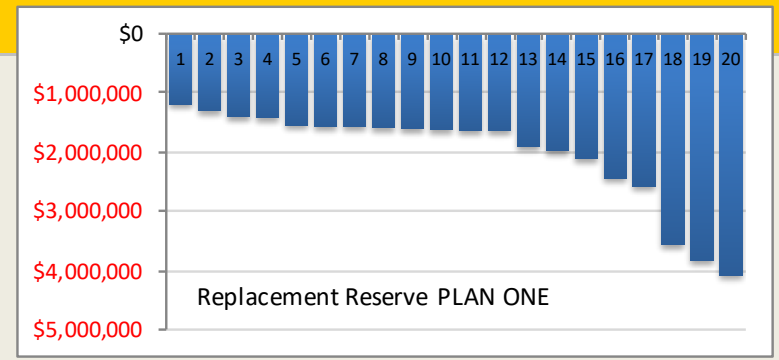


TABLE 1: REPLACEMENT RESERVE ANALYSIS

	year 1	year 2	year 3	year 4	year 5	year 6	year 7	year 8	year 9	year 10	year 11	year 12	year 13	year 14	year 15	year 16	year 17	year 18	year 19	year 20
	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041
A. ESTIMATED REPLACEMENT RESERVES/UPFRONT DEPOSIT [NOTE 1]	\$139,991	\$1,191,314	\$1,301,670	\$1,397,959	\$1,423,431	\$1,544,492	\$1,571,457	\$1,573,816	\$1,587,859	\$1,602,323	\$1,625,658	\$1,639,187	\$1,642,741	\$1,899,696	\$1,977,182	\$2,110,310	\$2,441,449	\$2,577,383	\$3,571,120	\$3,829,802
Additional Reserves from Outside Sources																				
B. ANNUAL REPLACEMENT RESERVE DEPOSIT AMOUNT [SEE NOTE 2]	\$35,228	\$36,285	\$37,373	\$38,495	\$39,649	\$40,839	\$42,064	\$43,326	\$44,626	\$45,965	\$47,344	\$48,764	\$50,227	\$51,734	\$53,286	\$54,884	\$56,531	\$58,227	\$59,973	\$61,773
C. AVAILABLE REPLACEMENT RESERVES	\$175,219	\$1,155,029	\$1,264,297	\$1,359,464	\$1,383,782	\$1,503,653	\$1,529,393	\$1,530,490	\$1,543,233	\$1,556,358	\$1,578,315	\$1,590,424	\$1,592,514	\$1,847,963	\$1,923,897	\$2,055,426	\$2,384,918	\$2,519,156	\$3,511,146	\$3,768,030
D. PROJECTED REPAIR AND REPLACEMENT NEEDS	\$1,366,533	\$146,641	\$133,662	\$63,967	\$160,710	\$67,804	\$44,423	\$57,369	\$59,090	\$69,300	\$60,873	\$52,317	\$307,182	\$129,220	\$186,413	\$386,022	\$192,465	\$1,051,963	\$318,656	\$315,885
E. BALANCE OF RESERVES AFTER REPAIRS AND REPLACEMENTS	\$1,191,314	\$1,301,670	\$1,397,959	\$1,423,431	\$1,544,492	\$1,571,457	\$1,573,816	\$1,587,859	\$1,602,323	\$1,625,658	\$1,639,187	\$1,642,741	\$1,899,696	\$1,977,182	\$2,110,310	\$2,441,449	\$2,577,383	\$3,571,120	\$3,829,802	\$4,083,915
F. INTEREST EARNED [SEE NOTE 3]	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
G. YEAR END REPLACEMENT RESERVE BALANCE	\$1,191,314	\$1,301,670	\$1,397,959	\$1,423,431	\$1,544,492	\$1,571,457	\$1,573,816	\$1,587,859	\$1,602,323	\$1,625,658	\$1,639,187	\$1,642,741	\$1,899,696	\$1,977,182	\$2,110,310	\$2,441,449	\$2,577,383	\$3,571,120	\$3,829,802	\$4,083,915
H. RECOMMENDED 1 YEAR MINIMUM REPLACEMENT RESERVE BALANCE	\$35,228	\$36,285	\$37,373	\$38,495	\$39,649	\$40,839	\$42,064	\$43,326	\$44,626	\$45,965	\$47,344	\$48,764	\$50,227	\$51,734	\$53,286	\$54,884	\$56,531	\$58,227	\$59,973	\$61,773

NOTE 1: The starting reserve balance for 2022 is shown as \$139,991.

NOTE 2: Annual contributions to reserves (ADRR) are shown to be \$35,228 (\$597/unit), increasing annually by 3%.

NOTE 3: Anticipated annual interest earned on reserves (after repairs and replacements) is 1%.



Replacement Reserve Analysis

PLAN TWO

BC Stewart & Associates, Pocasset, Massachusetts

development: **Warren House**
 date: **19th June, 2022**
 location: **Newton, MA**
 project age: **Renovated 1992, Major system upgrades 2016**
 number of buildings: **1**
 number of dwelling units: **59**

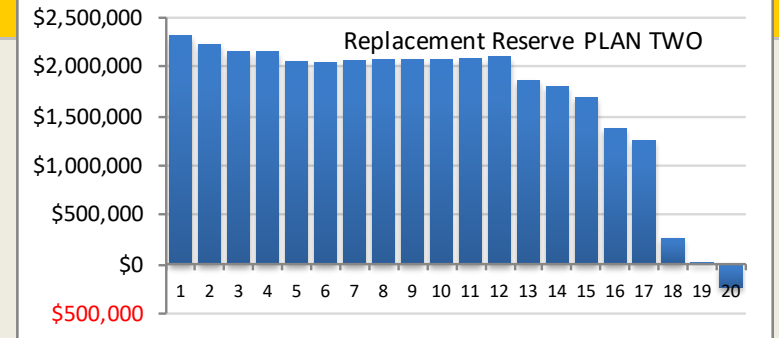


TABLE 1: REPLACEMENT RESERVE ANALYSIS

	year 1	year 2	year 3	year 4	year 5	year 6	year 7	year 8	year 9	year 10	year 11	year 12	year 13	year 14	year 15	year 16	year 17	year 18	year 19	year 20
	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041
A. ESTIMATED REPLACEMENT RESERVES/UPFRONT DEPOSIT [NOTE 1]	\$139,991	\$2,321,255	\$2,233,895	\$2,159,810	\$2,156,163	\$2,056,425	\$2,050,267	\$2,068,788	\$2,075,763	\$2,082,397	\$2,080,194	\$2,087,837	\$2,105,594	\$1,868,875	\$1,810,168	\$1,694,969	\$1,379,632	\$1,257,337	\$271,743	\$15,038
Additional Reserves from Outside Sources	\$3,500,000																			
B. ANNUAL REPLACEMENT RESERVE DEPOSIT AMOUNT [SEE NOTE 2]	\$35,552	\$36,619	\$37,717	\$38,849	\$40,014	\$41,215	\$42,451	\$43,725	\$45,036	\$46,387	\$47,779	\$49,212	\$50,689	\$52,209	\$53,776	\$55,389	\$57,051	\$58,762	\$60,525	\$62,341
C. AVAILABLE REPLACEMENT RESERVES	\$3,675,543	\$2,357,874	\$2,271,612	\$2,198,658	\$2,196,178	\$2,097,640	\$2,092,718	\$2,112,512	\$2,120,800	\$2,128,785	\$2,127,973	\$2,137,049	\$2,156,283	\$1,921,084	\$1,863,944	\$1,750,358	\$1,436,682	\$1,316,099	\$332,268	\$77,379
D. PROJECTED REPAIR AND REPLACEMENT NEEDS	\$1,366,533	\$146,641	\$133,662	\$63,967	\$160,710	\$67,804	\$44,423	\$57,369	\$59,090	\$69,300	\$60,873	\$52,317	\$307,182	\$129,220	\$186,413	\$386,022	\$192,465	\$1,051,963	\$318,656	\$315,885
E. BALANCE OF RESERVES AFTER REPAIRS AND REPLACEMENTS	\$2,309,010	\$2,211,232	\$2,137,950	\$2,134,691	\$2,035,467	\$2,029,836	\$2,048,295	\$2,055,144	\$2,061,710	\$2,059,485	\$2,067,100	\$2,084,732	\$1,849,101	\$1,791,864	\$1,677,530	\$1,364,335	\$1,244,217	\$264,135	\$13,611	\$238,506
F. INTEREST EARNED [SEE NOTE 3]	\$12,245	\$22,662	\$21,859	\$21,473	\$20,958	\$20,431	\$20,493	\$20,620	\$20,687	\$20,709	\$20,736	\$20,863	\$19,773	\$18,304	\$17,438	\$15,297	\$13,119	\$7,607	\$1,427	\$0
G. YEAR END REPLACEMENT RESERVE BALANCE	\$2,321,255	\$2,233,895	\$2,159,810	\$2,156,163	\$2,056,425	\$2,050,267	\$2,068,788	\$2,075,763	\$2,082,397	\$2,080,194	\$2,087,837	\$2,105,594	\$1,868,875	\$1,810,168	\$1,694,969	\$1,379,632	\$1,257,337	\$271,743	\$15,038	\$238,506
H. RECOMMENDED 1 YEAR MINIMUM REPLACEMENT RESERVE BALANCE	\$35,552	\$36,619	\$37,717	\$38,849	\$40,014	\$41,215	\$42,451	\$43,725	\$45,036	\$46,387	\$47,779	\$49,212	\$50,689	\$52,209	\$53,776	\$55,389	\$57,051	\$58,762	\$60,525	\$62,341

NOTE 1: The starting reserve balance for 2022 is shown as \$139,991 - PLUS an additional \$3.5M in an outside infusion of capital
 NOTE 2: Annual contributions to reserves (ADRR) are shown to be \$35,228 (\$597/unit), increasing annually by 3%.
 NOTE 3: Anticipated annual interest earned on reserves (after repairs and replacements) is 1%.

**ATTACHMENT 9 –
DEVELOPMENT TEAM**

(including 2023 budgets for Warren House and
Newton Community Development Foundation, Inc.)

BOARD OF DIRECTORS 2022-2023

EXECUTIVE COMMITTEE

Robert E. Engler, *President*

Mr. Engler was President of SEB LLC for 40 years, a private consulting firm specializing in affordable housing and community development. In addition to serving as the President of NCDF, Mr. Engler also serves as President of the Pelham Corporation, a non-profit organization based in Framingham, which owns 558 rental units. Mr. Engler, a resident of Newton since 1969, joined NCDF in 1985.

Judith Weber, *Vice President*

Ms. Weber is a principal with VIVA Consulting, LLC where she offers profit, nonprofit and government clients expertise in the management and administration of affordable housing. She lectures and teaches extensively in residential asset and property management. Ms. Weber is the governor's appointee to the Newton Housing Authority's Board of Commissioners and is the Newton Housing Authority's appointee to the Newton Community Preservation Commission (CPC) and the CPC's appointee to the Newton Housing Trust. Ms. Weber has been a Newton resident since 1977 and joined NCDF in 1996.

Timothy J. Dacey, *Treasurer*

Mr. Dacey is senior counsel at the Boston law firm of Goulston & Storrs PC. He first became interested in NCDF "as a result of its outstanding work in redeveloping Warren House", which is near his home in West Newton. Mr. Dacey has lived in Newton since 1975 and joined NCDF in 1991.

Brian Gallagher, *Secretary*

Mr. Gallagher graduated from Boston College and has worked in the field of property management for more than two decades. For over 10 years Brian has been employed with Corcoran Management Company as a Senior Property Manager and now a Portfolio Director. Mr. Gallagher has his Certified Property Manager (CPM) designation from the Institute of Real Estate Management. Previously a Newton resident, Mr. Gallagher and his family now live in Braintree and he joined NCDF in 2016.

MEMBERS

Zak Attenborough	Sandra Kelly	Susan Paley
Christine Dillon	David Koven	Anne Priestley
Maxwell Ebb	Lisa Menelly	Liz Seeley
Elisabeth Ebb	Frank Neal	Judith Spar
Gaye Freed		Anne Tribush

ADVISORY COMMITTEE

Paul Doherty	Vincent O'Donnell
David Ennis	Ted Ritchie
Laurie Gould	Caren Silverlieb
Michael Malec	Alice Stevens

**Jeanne Strickland, Executive Director
Newton Community Development Foundation (NCDF)**

Jeanne Strickland has been actively involved in affordable housing and community development for more than 35 years, and has served as NCDF Executive Director since 1997. She began her career with NCDF in 1986 as the Live-In Property Manager at The John W. Weeks House. In 1992 she took on management responsibilities at Warren House where she was responsible for an ambitious rent up and achieved 100% occupancy in less than 3 months of receiving Certificates of Occupancy. Along with her extensive financial and property management experience, Jeanne has an inherent focus on the inclusion of supportive services for residents.

She is a successful fundraiser, not only from government sources, but also via foundation grants, contributions from local businesses and through an annual appeal to individual donors. Under her management, fundraising efforts have substantially expanded, resulting in an increase of grants and contributions from approximately \$8,000 annually to over \$100,000. Resident Services has grown from a part-time Social Service Coordinator to three full-time staff members, allowing for a considerable increase in programming and supportive services.

Jeanne is responsible for managing the day-to-day operations of the organization including financial, accounting, human resources and administrative matters. She is closely involved in planning, supervising and evaluating programs and activities, provides direction and guidance to more than 20 full and part-time staff, and works closely with the Board of Directors. She has cultivated close relationships with colleagues in the field, local government representatives, funders and community members.

Always a strong proponent of sustaining affordability of NCDF properties, and of fair housing policy in general at the local, state and federal level, Jeanne was honored with the Bob Swett Award in recognition of "outstanding leadership and contribution to affordable housing through the advancement of fair housing." Her expertise includes assembling and working with a professional team to negotiate the complexities of refinancing to maintain the character and structural integrity of each of NCDF's housing communities.

Under her leadership, NCDF:

- Developed The Homes at Auburndale Yard, taking occupancy in 1998.
- Refinanced Casselman House in 2003 and Warren House in 2009.
- Refinanced Houghton Village in 2017, preserving affordability and enabling upgrades.
- Completed major renovation, rehabilitation and preservation projects at Warren House, Weeks House, Houghton Village, Casselman House and Boylston Street between 2007 and 2020.

In addition to her responsibilities at NCDF, Jeanne serves as Treasurer of Pelham Corporation, a non-profit organization based in Framingham, Massachusetts that owns 558 rental units. She is a dedicated member of the Massachusetts Clubhouse Coalition's Employment Expansion Project Employer Advisory Board, working with other business leaders to increase employment opportunities for people recovering from mental illness, and receiving an award for her leadership role.

Jeanne holds a BA degree in Urban Planning from the University of Massachusetts and began her career in affordable housing in 1985 as a Section 8 Program Administrator at Brookline Housing Authority.

NEWTON COMMUNITY DEVELOPMENT FOUNDATION, INC.
Operating Budget
For Year Ending December 31, 2023

	<u>BUDGET</u>
<u>REVENUES</u>	
Management Fees	368,579
Consulting Fees	13,000
Misc Interest Income	25,000
Fundraising and Grants	<u>125,000</u>
TOTAL REVENUES	531,579
 <u>EXPENSES</u>	
Operating	99,406
Personnel	
(Salaries including FICA/MUTA and benefits)	1,552,325
(Less reimbursement from properties)	(1,143,430)
Professional Services	54,275
Fundraising and Grant Expenses	100,000
TOTAL EXPENSES	<u>662,576</u>
 OPERATING INCOME	 (130,998)
 OTHER INCOME/EXPENSES	
WSLP distribution of funds	325,000
Interest/Investment Income	40,000
Less Investment Fees	(42,000)
 NET INCOME	 <u><u>192,002</u></u>

**Warren House Associates LP
Operating Budget
For Year Ending December 31, 2023**

<u>DESCRIPTION</u>	<u>BUDGET</u>
GROSS BASE RENT-RESIDENTIAL	1,758,956
GROSS ADDITIONAL PARKING RENTALS	300
GROSS POTENTIAL RENTAL INCOME	<u>1,759,256</u>
VACANCIES - RESIDENTIAL (5%)	(87,948)
BAD DEBTS	(2,000)
TOTAL DEDUCTIONS	<u>(89,948)</u>
EFFECTIVE RENTAL INCOME	1,669,308
OTHER INCOME	14,100
TOTAL EFFECTIVE INCOME	1,683,408
REPLACEMENT RESERVE REIMBURSEMENT	<u>75,000</u>
TOTAL FUNDS RECEIVED	1,758,408
ADMINISTRATIVE EXPENSES	273,794
MAINTENANCE EXPENSES	281,291
RESIDENT SERVICES	25,000
UTILITIES	120,121
REPLACEMENT RESERVE DEPOSITS	37,528
TAXES & INSURANCE	
REAL ESTATE TAXES	120,000
INSURANCE	96,673
TOTAL TAXES & INSURANCE	<u>216,673</u>
TOT. DIS BEFORE CAP EXP & D/S	<u>954,408</u>
FUNDS FLOW PRIOR TO C/E & D/S	<u>804,001</u>
CAPITAL EXPENDITURES	<u>142,100</u>
FUNDS FLOW PRIOR TO DEBT SERVICE	661,901
GROSS DEBT SERVICE	<u>650,000</u>
LESS INT. INC. EARNED R/R ESCROW	<u>600</u>
NET AVAILABLE FOR EQUITY	<u><u>11,301</u></u>



Gale Associates, Inc.
300 Ledgewood Place | Suite 300 | Rockland, MA 02370
P 781.335.6465 F 781.335.6467

April 12, 2023

Ms. Jeanne M. Strickland / Executive Director
Newton Community Development Foundation, Inc.
425 Watertown Street, Suite #205
Newton, MA 02458

RE: Gale Associates, Inc. Previous Consulting Services
For the Newton Community Development Foundation, Inc.
Newton, MA

Dear Ms. Strickland:

As requested, please accept this correspondence as brief summary of previous consulting services that have been provided by Gale Associates, Inc. (Gale) for the Newton Community Development Foundation, Inc. (NCDF). As you are aware, Gale's services extend back to 2005 as our first evaluation, and we have continued to provide evaluations, design, bid and construction phase services to NCDF to identify items that require modification to address safety/fall related hazards, water infiltration, site/civil upgrades, and capital program renovations throughout this duration. A summary of these items are as follows:

Casselman House:

An initial evaluation was performed in 2005 to identify water infiltration sources and provide options for repair. As a result of this service, multiple renovations projects were initiated based on the severity of the conditions and the availability of NCDF funds. These include masonry renovations, balcony waterproofing replacement, wall cladding, the removal and replacements of the low-slope and asphalt shingle roof systems, and structural assistance to identify existing floor slab reinforcing to accommodate future interior renovations.

The John W. Weeks House (Historic)

An initial evaluation was performed in 2005 to identify the existing building configuration and future renovations and phasing plans to accommodate this Historic Building, with work totaling \$1,117,076 that was completed in 2007. As you are aware, The John W. Weeks House is listed on the National Register of Historic Places, and as such, renovations that Gale suggested were to be in accordance with the National Park Services and incorporated similar, or like-kind building fabric to maintain the existing building conditions. Subsequent renovations after this initial project that were performed at this building were phased over multiple years, but included the removal and replacement of the low-slope and steep-sloped roofs, replacement of cementitious wall cladding, stabilization/replacement of potential fall hazards within the masonry walls, replacement of damaged cast stone and brick masonry elements, repointing of deteriorated mortar joints, installation of

SINCE 1964

Connecticut | Florida | Maine | Maryland | Massachusetts | New Hampshire | Virginia



throughwall flashings to promote drainage out of the masonry walls that were experiencing extensive water infiltration, stabilization and waterproofing of the exterior stairs, refurbishment of the historic wood entrance doors, generation and fabrication of emergency egress signage, and the removal and replacement of the existing window components with thermally efficient replica aluminum windows that were approved by the local historic commission.

Warren House (Historic)

An initial evaluation was performed in 2005 to present a phasing plan to renovate the existing building components. As you are aware, the Warren House is listed on the National Register of Historic Place, and as such, renovations that Gale suggested were to be in accordance with the National Park Services and incorporated similar, or like-kind building fabric to maintain the existing building conditions. Multiple different phases were presented to renovate this building, which included, the removal and replacement of the slate shingles, restoration of the main cupola and railing system, replacement of the low slope roofs, installation of fall arrest rails to provide secondary emergency egress off of select roof areas, emergency sounding and removal of damaged cast stone elements, replacement of select cast stone elements, replacement of the balcony waterproofing, removal and replacement of deteriorated brick masonry, the removal, excavation and replacement of the main entrance stairway to address heaving and sub-surface waterproofing, and repair/stabilization of select wood window units. The Phase 1 work was performed in 2009 – 2010 and Phase 2 work was performed in 2015.

Houghton Village

An initial evaluation was performed in 2015 as a result of reported water infiltration within the buildings at multiple locations. As a result of the evaluation and options considered, a phased approach was established to perform the complete removal and replacement of the asphalt shingles with a new vented nailboard insulation system, modifications of the existing attic ventilation system to accommodate the raised roof surface, removal and replacement of the existing clapboard siding with cementitious plank siding, replacement of the windows including interior finishes, replacement of the main pedestrian access doors, modifications of select townhouses to provide American with Disability Act upgrades including new bathroom components, kitchen cabinets, access ramps from the drive way to the main doorway, extension of the living quarters to accommodate the ramp length into the building, asphalt pavement replacement and modifications, interior demolition and replacement of the community center activity spaces, and replacement of the exterior common plaza space outside of the community center.

Ms. Jeanne M. Strickland / Executive Director
Gale Associates, Inc. Previous Consulting Services
For the Newton Community Development Foundation, Inc.
Newton, MA
April 12, 2023
Page 3



We trust this information serves your needs at this time. Should you have any questions or comments, please do not hesitate to contact this office.

Sincerely,

Gale Associates, Inc.

A handwritten signature in blue ink, appearing to read "Chris".

Christopher Musorofiti, RRC
Senior Associate
Building Envelope Consulting and Design Group

CC: Ms. Chelsea G. Knott – Gale

CM:cm

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David J. Levy – Biography

David J. Levy is an affordable housing professional in the Metro-Boston area and is the owner of Community Square Associates LLC, a real estate consulting company. David's career began more than twenty-five years ago in Worcester, Massachusetts, where he worked with the municipality to analyze the viability of an array of programs to generate funding for affordable housing. Beginning in 1996, and over the next seven years, David worked as an affordable housing project manager for two community-based, non-profit organizations where he oversaw the development of ten projects, producing 91 units of housing for low-income renters and first-time homebuyers. Much of this work was part of an initiative to redevelop historically significant properties, often former lodging houses, for the working poor.

In 2003, David was selected to lead the Housing Corporation of Arlington (HCA), a recently revived community development corporation which had aspirations to grow. Under David's leadership, HCA was transformed into a highly efficient and productive organization serving 200 families annually through its homelessness prevention programs and subsidized rental housing. For almost nine years, David invested much of his time and energy to position HCA for success, building relations with lenders and local leaders, developing operating systems, building a donor base, implementing marketing strategies, and cultivating a highly motivated and invested board of directors. During David's tenure, HCA developed eight properties consisting of 70 affordable apartments, culminating in the first award of Low Income Housing Tax Credits to an affordable housing project in Arlington.

Shortly after leaving HCA in 2012, David worked in affordable housing finance as senior housing specialist at the quasi-public agency, MassHousing, where he collaborated with other state and private lenders to underwrite affordable housing loans for the Commonwealth's Affordable Housing Trust Fund.

In 2014, David launched New Seasons Development LLC, a for-profit real estate development and consulting firm. Within two short years, New Seasons cultivated a significant client-base, successfully assisting for-profits, non-profits, and municipalities with their affordable housing needs. Today, as owner and principal of Community Square Associates, David continues to provide consulting support to all sectors of the affordable housing industry in eastern Massachusetts.

David graduated from Clark University in 1993 with a Bachelor of Arts degree in geography. In his free time, David mentors Clark students and others who are interested in pursuing careers in affordable housing.

David J. Levy – Sample Client List

- Allston Brighton Community Development Corporation
- Caleb Foundation
- Charlesbank Cooperative Corporation
- Codman Square Neighborhood Development Corporation
- Community Development Partnership
- Dorchester Bay Economic Development Corporation
- Duxbury Affordable Housing Trust
- Fenway Community Development Corporation
- Foxborough Zoning Board of Appeals
- Harwich Ecumenical Council for Housing (HECH)
- Island Housing Trust
- Massachusetts Housing Partnership
- Newton Community Development Foundation
- North Shore Community Development Coalition
- Nuestra Comunidad Development Corporation
- Oak Foundation
- Southwest Boston CDC
- The Neighborhood Developers
- Town of Weston
- Urban Edge
- Waterfield Design Group
- Women’s Institute for Housing and Economic Development
- Worcester Common Ground

David J. Levy – Sample Project List

- 27-unit, scattered-site, preservation, SRO supportive housing project: 4% LIHTC
- 30-unit, production, family, mixed-use housing project: 9% LIHTC
- 40-unit, scattered-site, preservation + production, family housing project: 4% LIHTC (Boston)
- 4-unit, production, supportive housing/homeless family project
- 276-unit, 24 story, capital improvement project (Boston)
- 40-unit production, family housing project: 9% LIHTC
- 39-unit, scattered-site, preservation project: 4% LIHTC
- 103-unit, two phase, production project: 9% LIHTC
- 59-unit, scattered-site, preservation project: 4% LIHTC (Boston)
- 52-unit, 40T preservation project: 4% LIHTC (Boston)
- 45-unit, 40B age-restricted, new construction project: 9% LIHTC
- 27-unit, production project: 9% LIHTC (Boston)

David J. Levy – Consulting Work/Experience

For more than seven years as a real estate development consultant, David has had the pleasure of working with a diverse client base on a variety of affordable housing projects as well as other real estate engagements. In addition to ongoing consulting work for non-profit developer clients, David also has provided, and in some cases continues to provide, services to several for-profit 40B developers, a charitable foundation, municipalities, a non-profit theater company and a limited equity cooperative. Most of this work involves analyzing the feasibility of a particular initiative, creating development projections and providing project management services. David also mentors his client's development staff on an ongoing basis and advises on new hiring.

David's work with developers includes the following scope of services:

- Site analysis and sale/purchase negotiations
- Development program design and feasibility analysis
- Development pro forma analysis and planning, including investigation of alternatives
- LIHTC projections and basis calculations
- Mortgage financing, subsidy, and investor equity source strategies
- Due Diligence oversight: preparation for various approvals
- Oversight of environmental testing and related matters
- Designing appropriate project ownership structure
- Oversight of zoning processes
- Oversight of construction cost estimating
- Preparation and submittal of financing applications including to the FHLB of Boston, DHCD (MassOneStop+ applications), MassDevelopment, MassHousing, Department of Neighborhood Development (City of Boston), Community Preservation Act funding, HOME Consortium funding, acquisition and predevelopment capital (CEDAC, Boston Capital, LISC, Life Initiative), and commercial lenders
- Pursuit and negotiation of all specialized financing and resource commitments
- Pursuit of construction and permanent debt financing
- Selection and oversight of architect, engineers and other professionals
- Coordination of loan and project closings
- Oversight of project finances and requisitions through construction completion
- Bidding and contractor selection
- Coordination of loan and investment closings (as a lender)
- Construction monitoring
- Oversight of completion, rent up, cost certification and development close out
- Management of housing development staff

THIS IS GALE

Established in 1964, Gale Associates, Inc. is a 100-person design and consulting firm of civil and structural engineers, architects, building enclosure specialists, and aviation engineers and planners focused on the repair, renovation and adaptive reuse of existing buildings, infrastructures and sites. Gale provides consulting and design services to the public and private sectors. Gale maintains seven offices throughout New England, the mid-Atlantic states and Florida. We provide a collaborative culture, which encourages opportunity for staff, respect and a work/life balance, and we strive to be recognized annually as a "Best Firm to Work For." Strong work ethics and exceptional client service is a direct result of our staff's enthusiasm and excitement in our workplace. We give back to our communities by raising money for local food pantries and supporting the Department of Children and Families with clothing drives.



The Gale Difference – Investment in Our Firm and Employees

By investing and supporting staff, they are well-trained, experienced employees willing and motivated to support our clients' needs and schedules. Gale's staff and firm investments include the following:

- Attracting and retaining the very best technical talent through aggressive recruiting at respected technical/engineering and architectural programs.
- Providing a healthy work environment that supports staff with our CORE philosophy:

Collaboration between staff to service our clients
Opportunity for staff development and advancement/growth
Respect between co-workers and our clients
Equilibrium/balance between work and families.



The Zweig Group has chosen Gale as one of the "Best Firms to Work For" for the 9th year in a row!

Gale's Mission:

Gale is a collaborative firm of Engineers, Architects, and Planners. We understand our clients' unique needs and create practical, reliable, and sustainable solutions for their sites, facilities, and infrastructure. Our culture encourages respect, provides opportunity, supports a work-life balance, and strives for client satisfaction.

Gale's Vision:

To be a premier design and consulting firm recognized for empowering employees, developing trusted relationships, and providing practical solutions to meet our clients' individual needs.

Gale's Design Philosophy

Every project is unique. Our experience drives creative design solutions for the sustainable reuse and maintenance of our client's facilities. Our principal goal is to develop strategies that enable the reuse of existing facilities, resolve conflicts between preservation, codes, and functional performance requirements. Our team of architects, engineers, planners, and preservationists are invested on successful completion of the clients goal from project execution through project completion.

Airport Engineering and Planning

The Airport Engineering and Planning Group provides planning, permitting, design, and construction phase services to public and private aviation clients. Gale excels in navigating the numerous regulatory, permitting, and approval processes unique to the aviation industry. We provide a full range of services for airport and building infrastructure improvements, both airside and landside.



Athletic Facilities Planning and Design

The Athletic Facilities Consulting Group provides comprehensive athletic campus condition evaluations, program demand assessments, and master planning services. Our services include programming, planning, design, permitting, bid and construction phase consulting. We are experienced in designing high-use athletic fields, including natural and synthetic turf, and hard-court facilities. We specialize in planning well-integrated athletic campuses, including high-efficiency lighting, irrigation, scoring/timing infrastructure, and amenities buildings.



Building Enclosure Design and Consulting

The Building Enclosure Group investigates, evaluates, designs repairs, and provides construction administration to all exterior building enclosure components including roofs, walls, windows/glazing, and waterproofing. We specialize in all issues related to moisture intrusion and assist architectural firms and clients with peer review consulting on new construction projects. We also provide forensic and expert witness services, and preventative maintenance programs. Our clients include private sector commercial and institution users, as well as federal, state, and municipal agencies.



Civil Engineering

The Civil Engineering Group provides comprehensive land planning and site engineering services. We perform evaluation and design services for public and private facilities including site layout, grading, hydrology and drainage design, flood analysis and mitigation design, landscape design, and utilities planning and design. Gale provides assistance with all aspects of local, state, and federal permitting.



Landscape Architecture

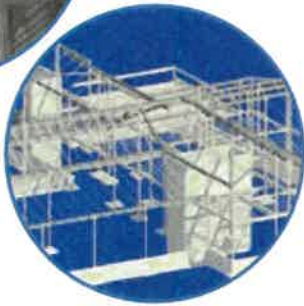
The Landscape Architecture Group provides program development, concept and detailed site design, document production, construction phase services, and presentation imaging. Our field experience and knowledge of product and procedures gives our clients practical and cost-effective options within the design and construction trades. Project types range from municipal schools and public buildings, to athletic facilities, parks and recreational areas.



Structural Engineering

The Structural Engineering Group provides forensics, analysis and design of steel, concrete, masonry, and wood and composite structures of varying types for both existing and new construction. We specialize in concrete foundation design, waterproofing, structural stabilization, structural strengthening, effects of wind and snow load, seismic retrofits, concrete and timber repair, and parking garage restoration/protection.





Building Enclosure Design and Consulting

The Building Enclosure Group conducts forensic evaluations, designs repairs, and provides construction administration for exterior building enclosure components including roofs, walls, windows/ glazing, and waterproofing. We specialize in moisture intrusion issues and provide clients with practical solutions to improve their building exterior enclosure and thermal performance. We also provide forensic and expert witness services, and preventative maintenance programs. Our clients include private sector commercial and institution users, as well as federal, state, and municipal agencies.

The Enclosure Group's expertise extends to historic structures. We have worked on many properties listed on various State and National Historic Registers, as well as buildings located in designated Historic Districts. We have worked successfully with the Massachusetts Historic Commission and are familiar with their staff and deliverable requirements.

Structural Engineering Group

In conjunction with our building enclosure expertise services, Gale's Structural Engineering Group evaluates structural systems, including components supporting the building enclosure. We offer forensic evaluation of exterior conditions to determine the presence and cause of underlying structural problems, and provide designs necessary to properly complete repairs for renovations. The Structural Engineering Group provides analysis, forensics, and design of steel, concrete, masonry, and wood structures. We specialize in concrete foundation design, structural stabilization, structural strengthening, wind and snow load analyses for components and cladding, design of seismic bracing for roof parapets, concrete and timber repairs, and parking garage restoration/protection. Our projects range from designing components for new buildings to the rehabilitation of historic buildings experiencing deterioration and structural failures.

Forensic Engineering

As forensic building enclosure consultants, we utilize the necessary field-testing equipment to properly diagnose moisture and air infiltration problems. Gale owns and utilizes equipment such as infrared cameras, capacitance meters, illuminated borescopes for cavity wall exploration, pressure testing apparatus, pull-out meters, and various lab testing capabilities. We also own and utilize global positioning survey equipment to accurately produce building plans to within two centimeters variation, both horizontally and vertically.

Sustainable Engineering

Gale has an extensive background in sustainable design and energy efficiency that specifically relates to building enclosure systems. Our staff includes LEED accredited professionals, completely familiar with the "green building" requirements of the U.S. Green Building Council (USGBC) and various building codes/sections related to sustainable and energy efficiency design. Members of our LEED AP staff sit on the Building Envelope Standards Committee of the USGBC.

ATTACHMENT 10 –
LETTERS OF SUPPORT

DAVID KOVEN

33 Harrison Street
Newton, MA 02461
617-429-1619
david@kovenconsulting.com

April 17, 2023

Members of the City of Newton Community Committee, Jennifer Molinsky, Chair
Lara Kritzer, Community Preservation Program Manager
City Hall
100 Commonwealth Avenue
Newton, MA 02459

Re: Warren House

Dear Committee Members and Ms. Kritzer:


I am writing in support of the Newton Community Development Foundation's (NCDF's) proposal for CPA funds to replace original windows, perform masonry repairs, and preserve ornamental cast stone copings at the former Levi F. Warren Junior High School, now known as Warren House.

My reason for support of this proposal is simple. The Newton market makes affordable housing creation and preservation a challenge, and despite the City's diligent efforts, Newton has a relatively low number of affordable housing units. I have owned a home in Newton for nearly 30 years, raised a family and been active with the Newton Community Development Foundation for more than 10 years. As a Newton resident and an affordable housing professional, it has been a bit disappointing that we have not been able to provide more housing opportunities for our less affluent neighbors. I know that you share that feeling.

With all the impediments to creating new affordable housing, it is imperative that we make every effort to preserve those units we have been able to create. As you know from our proposal and from our helpful discussions, NCDF is committed to keeping as many affordable units as possible as long as we possibly can. We need the Trust's help in making that possible by helping preserve the building's physical integrity.

You know NCDF's mission and history, the properties it owns and manages, and the residents who sing our praises. NCDF has a stellar reputation and its properties are a source of pride to our community.

I look forward to learning that we have received your support for Warren House, and I thank you in advance for your consideration.

Sincerely,

David Koven

April 19, 2023

Jennifer Molinsky, Chair
Newton Community Preservation Committee
1000 Commonwealth Avenue
Newton, MA 02459

Re: Letter of Reference for Warren House

Dear Ms. Molinsky,


My name is Arelis Castillo and my son, Ricardo and I have lived at Warren House since February 2022. We lived in an apartment in a private home in Jamaica Plain for more than 15 years, but were informed that we had to move since the owner needed to move into this apartment. I have multiple sclerosis and my son is my full-time caregiver. Because I use a wheelchair, I needed an apartment with accessibility features.

The process of moving to Warren House was smooth, and we had the opportunity to work closely with NCDF Resident Services as well as Management. Resident Services guided us in the direction of accessing in-home services through Springwell, fuel assistance and helped to provide additional accessibility accommodations which were needed in the unit, such as a raised toilet and automatic door opener.

Management is attentive and prompt when handling anything we ask. The maintenance of the property is wonderful. The laundry room, hallways, main lobby, trash room and grounds are always very clean. Work orders in our apartments are always handled quickly and professionally.

One of our only concerns about Warren House is the windows and how cold it can get in the apartment in the winter. We are on the ground level and heat costs can be very expensive, even with fuel assistance. For this reason, we are hopeful that Warren House will be considered for the CPA and AHT funds to help fund the very important and necessary window replacement project.

Thank you,


Arelis Castillo,

Warren House, apartment # 110

Mark F. Poster, MD
1600 Washington Street, Apt 121
West Newton, MA 02465
Cell phone- (617) 510 6593

Jennifer Molinsky, Chair
Newton Community Preservation Committee
1000 Commonwealth Avenue
Newton, MA 02459

April 15, 2023

Dear Ms Molinsky,

I have been a resident of the Warren House, a Newton Community Development Foundation (NCDF) property, for the past 16 years. I have found the property management and services here to be first rate. The location is very convenient. Neighbors are very friendly and there is a diverse mix of residents of all ages.

I understand that NCDF is seeking Community Preservation Act (CPA) and City of Newton Affordable Housing Trust (AHT) funds for masonry repair, cast stone restoration, and window replacement. I can testify to the need for these repairs and replacements. I have had water leakage in my living room from masonry cracks after rainstorms. My windows have required weather stripping and plastic sheets each winter due to cold air blowing through the jambs. Even with these stop-gap measures, I have had to pay over \$1000. in added space heating cost each winter because one Whalen Unit services both my own and my son's bedroom. If his bedroom is 72 degrees in winter, my bedroom might be 60 degrees, even with the plastic sheeting.

Feel free to contact me on my cell phone if I can answer any questions, or if you or your staff would like to inspect the masonry cracks or window air gaps mentioned above.

Sincerely yours,

Mark F. Poster, MD

Mark F. Poster, MD

April 17, 2023

Jennifer Molinsky, Chair
Newton Community Preservation Committee
1000 Commonwealth Avenue
Newton, MA 02459

Ms. Molinsky,

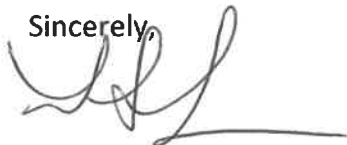
My name is Tamika Officer. I am a single mom and a long-time resident of Warren House. My journey here started as I wanted to return to Newton after a few years on the North Shore. The move was to be closer to family and allow my son to attend Newton schools as I did as a child. Warren House provided that opportunity, and for that, I am grateful.

My experience as a tenant has been pleasant. I have been a resident of the Warren house for nine years. The staff here is amazing, I feel safe, heard, and supported throughout my time here, but one thing that remains a struggle is the cost of heating and cooling the residence due to the windows on the property.

I would love to see new windows in place. New windows would make residing at Warren House affordable as the current setup is older, allowing air to travel and making it hard to attain comfortable temperatures without driving up costs.

Please consider providing Warren House with the proposed funding for the window replacement project, as I would love to continue to reside in the beautiful community, I have called home over the last nine years comfortably.

Sincerely,

A handwritten signature in black ink, appearing to read 'Tamika Officer', with a long horizontal flourish extending to the right.

Tamika Officer
Warren House, apartment # 112

April 19, 2023

Jennifer Molinsky, Chair
Newton Community Preservation Committee
Newton City Hall
1000 Commonwealth Avenue
Newton, MA 02459

Hi Jennifer,

My name is Joan McGrath and I have lived at 1617 Washington Street, a neighbor across from Warren House, for sixty years. My husband, Richard (Dick) McGrath has passed away now, but we have had some land history here in Newton. Dick's grandparents were the estate caretakers and lived on the property at 1600 Washington Street. When the land was taken by the City of Newton to build the Warren School the McGraths purchased their house and moved it across the street to lot 1617 Washington Street. When they passed away Dick and I had married and we bought their house. All five of our children attended Warren for three years (junior high then).

Newton then closed this school property but, 10 years later, it was purchased by Newton Community Development Foundation (NCDF) for housing.

At this time I am writing to you to support NCDF seeking funds from Newton Community Preservation Acts (CPA) to replace original windows, do masonry repairs, and cast stone copings at the former Warren Junior High School. The windows have exceeded their useful life and are in fair/poor condition.

NCDF is seeking funds for this project to cover a portion of the costs associated with replacing all windows with new aluminum, energy efficient windows to match the same historic profile as the existing windows.

The new windows will provide thermal efficiencies to meet code requirements for historic structures while also reducing the overall maintenance of the building. This project will result in reduced energy demand and lesser energy costs for residents of Warren House, many of whom are low income.

Warren House is a focal point of the community with the adjoining fields and tennis courts surrounding the property used extensively for personal and city sponsored activities which integrate Warren House and the residents in the community.

Thank you for your support.



Joan McGrath

Community Preservation Program
CPC STAFF READER'S GUIDE

Proposal Title: **Warren House Preservation and Rehabilitation Project**

CPA Funding Request: \$2,100,000 for the Preservation and Rehabilitation of Historic Resources
(18% of total project, 45% of the historic preservation project)

Total Project Cost: \$11,595,598

RECOMMENDED QUESTIONS, REQUESTS, or CPC ACTIONS prior to FUNDING VOTE:

The Newton Community Development Foundation (NCDF) is requesting Historic Resource funding for the ca. 1927 former Warren Junior High School, now the Warren House Apartments, to replace 248 windows, 199 of which are original to the historic schoolhouse, and complete masonry and cast stone repairs to the building. In addition to the preservation project, NCDF is also in the process of completing a separate project to refinance the building and address the ground lease and existing debt repayment needs of the project. The following is a list of general questions for members to consider while reviewing this project:

- 1) Is this building a significant historic resource that deserves to be preserved with CPA funding?
- 2) Is the proposed work a Capital Improvement or Maintenance?
- 3) Is the proposed work eligible for funding under the Community Preservation Act?
- 4) Does the proposed work meet the Secretary of the Interior's Guidelines for Rehabilitation?

To be eligible for CPA funding as an Historic Resource, a project must meet three requirements:

- 1) The property, structure, building or artifact must be either listed on the State or National Register of Historic Places, or must be considered locally significant by the Newton Historical Commission,
- 2) The type of work to be completed must meet the definition of allowable work under the Community Preservation Act, and,
- 3) The work to be completed must meet the Secretary of the Interior's Guidelines for Rehabilitation.

The Warren House meets the first requirement, that it is an Historic Resource as defined under the CPA, as it was listed on the National Register of Historic Places in 1990 as part of the Newton Multiple Resource Area. The property previously received \$1,082,500 in CPA Historic Resource funds in 2009 for roof and masonry repairs. As part of the grant agreement for that funding, NCDF agreed to a Preservation Restriction on the structure which will expire in 2056.

The second determination to be made is whether or not the type of work proposed is allowable under the CPA's requirements. CPA funding has been requested to Preserve and Rehabilitate/Restore the historic masonry building. The CPA defines Preservation as the "protection of personal or real property from injury, harm or destruction." It goes on to provide more detail on the uses of CPA funding in the definition of Rehabilitate/Restore, which states that CPA funding can only be used for the following purposes:

- **Capital Improvements** to the Historic Resource. Under the Act, Capital Improvements are defined as “reconstruction or alteration of real property that:
 - (1) materially adds to the value of the real property, or appreciably prolongs the useful life of the real property;
 - (2) becomes part of the real property or is permanently affixed to the real property so that removal would cause material damage to the property or article itself; and
 - (3) is intended to become a permanent installation or is intended to remain there for an indefinite period of time.”
- **Extraordinary Repairs** for the purpose of making the Historic Resource functional for its intended use
- Improvements to comply with the American with Disabilities Act and other federal, state or local building and access codes.

The Act also specifies that no CPA funding can be used under any funding category for work that is considered to be regular maintenance (Section 5(b)(2)). Maintenance is defined in the legislation as “incidental repairs which neither materially add to the value of the property nor appreciably prolong the property’s life, but keep the property in a condition of fitness, efficiency or readiness.”

Window replacement is generally considered to be a Capital Improvement to a building according to the definition above and is appropriate so long as the new elements replicate any original materials or features which are being removed. Further, both the window replacement and the masonry and cast stone repairs will insure that the building is protected from water infiltration and further damage from the elements. This meets the requirements for Preservation under the Act as the work will protect the structure from further injury or harm.

Members must also consider whether or not the specific work to be completed will comply with the Secretary of the Interior’s Standards. The Secretary of the Interior’s Standards for Historic Preservation are the guidelines established by the National Park Service for work on historic structures. The Standards are divided into four categories – Preservation, Rehabilitation, Restoration, and Reconstruction – which are applied based on the level of significance of the resource and the type of work to be completed. The CPA requires that all projects that receive funding as an Historic Resource meet the Secretary of the Interior’s Standards for Rehabilitation, which is the same standard applied to Historic Preservation Tax Credit projects. These Standards state that the historic character of the property should be retained and preserved and that projects must avoid the removal of historic or character defining elements, including those that were added to a property later and are a physical record of their time, place, and use. The guidelines encourage the repair of historic elements and allow replacement only when absolutely necessary. When replacement is required, they encourage using historic materials and methods and careful documentation. A full list of the Standards is available at:

<https://www.nps.gov/tps/standards/four-treatments/treatment-rehabilitation.htm>

RECOMMENDED CONDITIONS for CPC FUNDING:

1. CPA funding is intended to fund the replacement of 248 existing windows and the repair and restoration of masonry and cast stone elements on the exterior façade of the historic Warren House according to the Secretary of the Interior’s Standards for Historic Rehabilitation.
2. The CPC shall receive a copy of all of the design documents, including all window specifications and detail drawings for both the masonry and cast stone repairs.

3. Any periodic reports or interim deliverables prepared as part of this project, and any City or State reviews of those deliverables, must be shared with the CPC for online posting.
4. The CPC or its staff may periodically request updates on the status of the project and/or schedule site visits and request photos of any site work underway for the Committee and public’s information.
5. All recommended CPA funds should be appropriated by the City Council within 6 months and expended within two years of the date of any CPC recommendation. If either deadline cannot be met, the applicant should request an extension from the CPC, which the CPC may grant at its discretion.
6. Any CPA funds appropriated but not used for the purposes stated herein shall be returned to the Newton Community Preservation Fund.

DETAILED NOTES on PROPOSAL as SUBMITTED

(focus is on requirements either not met or not met well)

The proposal is considered to be complete as submitted, including all requested attachments.

PROJECT SUMMARY

Project Scope - NCDF requests CPA funding to complete work to preserve and rehabilitate the exterior shell of the ca. 1927 former school building which now houses 59 apartments, 21 of which are currently affordable to households below 50% AMI. Funding is proposed to replace all existing windows with new aluminum windows which will replicate the appearance of the original historic windows and complete necessary masonry and cast stone repairs in the areas surrounding these windows.

Project Outcomes - If successful, CPA funding will allow the NCDF to make these necessary improvements which will provide a more airtight, energy efficient, and cost effective solution to the existing windows both for the organization and their tenants.

USE(S) OF CPA FUNDS

This proposal requests CPA funding for the costs associated with the replacement of all 248 existing windows with new aluminum replacement windows, the installation of new insulation surrounding the window openings, and the repair of surrounding masonry and cast stone on the exterior façade. The preservation project accounts for approximately \$4.6 million of the overall \$11.6 million project. The remaining project costs are associated with repayment of the project’s existing debt and ground lease.

PROJECT TIMELINE

The NCDF is in the process of refinancing its existing mortgage on the Warren House and is looking to renegotiate their ground lease and secure funding for future restoration work as part of that process. The intent is to begin work on this project once the refinancing is complete in Spring/Summer 2024 and to complete all work associated with the window replacement and masonry/cast stone repairs during a 3-4 month period.

COMMUNITY NEEDS

The Warren House is a valuable community resource which provides both badly needed affordable housing to those households with incomes at or below 50% AMI but also market rate units which are

available for less than the new construction found elsewhere in Newton. The applicant has notes that the project meets the goals stated in the following City planning documents:

- **Newton Historic Preservation Design Guidelines** - The wood windows that once served as a light source in classrooms were restored in 1992 and will now be replaced with aluminum, thermally efficient, code compliant windows for historic structures and are anticipated to also reduce the overall maintenance needs of the building. This project is anticipated to result in reduced energy demand and lessen energy costs for residents, many of whom are very low income and all of whom pay for their own heating /air conditioning.
- **Newton’s Comprehensive Plan’s Housing Section** - Specifically Strategic Approaches on page 5-15 including “Acting in Concert with the City’ Other Goals and with Convergent Efforts of Others” and “Utilizing Existing Housing.” On page 5-12, NCDF states that they are meeting the Housing Goals and Strategic Approach of “Broadly Defining Diversity - Housing affordability in Newton is a problem, not only for low-income residents, but also for many others as well, including those of moderate and middle income” and of “Protecting the City’s Diversity” by undertaking a program of positive actions that will assure fair and equal housing opportunities for a population that is at least as diverse as at present in age, race, household type, life-style, cultural heritage and economic status.

Warren House is also run in conjunction with the surrounding McGrath Park, which is owned and operated by the City. NDCF is responsible for maintaining the parking spaces associated with the park and its facilities.

PROJECT DEVELOPMENT BUDGET

The NCDF has submitted a preliminary project budget from Gale Associates which is based on their 2019 analysis of the building and an estimation of anticipated current project costs. The project has not been bid out, however, and the documents from Gale note that the current budget would need to be refined and that the budget could be improved if all of the work was bid at one time. The project is also awaiting the completion of detailed drawing for window and masonry specifications which are necessary for future bidding and budget development.

PROJECT OPERATING BUDGET, MAINTENANCE

The NCDF developed the Warren House in the 1990s and has overseen its management since that time. Information on NCDF’s operating budget and anticipated future projects at the Warren House are included in this proposal. NCDF is also in the process of refinancing their mortgage, renegotiating the ground lease with the City, and seeking additional funding from the Affordable Housing Trust and City ARPA funds.

HISTORIC SIGNIFICANCE

Including overall significance, significant features, treatment

The proposal includes copies of the 1987 and 1997 Historic Inventory forms for the Levi Warren Junior High School which provide information on the architectural form and detailing of the ca. 1927 Colonial Revival brick structure as well as its history in the community. The NCDF has also provided a brief history of the building’s redevelopment in the 1990s into its current use as an apartment building and notes that it won awards at that time for the quality of its historic rehabilitation. A City preservation restriction was required as part of the building’s 2009 CPA funding which states that any changes to the structure must be approved by the Newton Historical Commission. The NHC reviewed the project on

May 2 and gave their preliminary approval to the project pending the review of more detailed drawings and plans in the future. A summary of their determination will be sent out separately prior to the meeting.

SPONSOR FINANCES & QUALIFICATIONS, INSTITUTIONAL SUPPORT

NCDF has a long history in Newton of providing safe and affordable housing for both families and seniors at their sites throughout the community. The proposal includes information on the specific board members and Executive Director Jeanne Strickland who is overseeing this project, as well as on Gale Associates and their affordable housing consultant David Levy. The proposal also includes several letters of support from residents and neighbors of the Warren House.



Ruthanne Fuller,
Mayor

Newton, Massachusetts
Community Preservation Committee
COMMUNITY PRESERVATION PLAN
 Revised December 14, 2021

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Barney S. Heath
 Director of Planning
 & Development

Massachusetts' [Community Preservation Act](#) (CPA) provides local and state funds for projects in community housing (affordable housing), historic resources, open space, and recreation, within certain constraints:

ALLOWABLE SPENDING PURPOSES under the Community Preservation Act				
	COMMUNITY HOUSING	HISTORIC RESOURCES	OPEN SPACE	RECREATION
ACQUIRE	YES	YES	YES	YES
CREATE	YES	NO	YES	YES
PRESERVE	YES	YES	YES	YES
SUPPORT	YES	NO	NO	NO
REHABILITATE / RESTORE	YES, IF acquired or created with CPA funds	YES	YES, IF acquired or created with CPA funds	YES

The [About the CPA](#) page in Newton's CPA program website includes a more detailed [Allowable Uses of Funds](#) chart, including the full definition of each eligible resource and its CPA fundable activities. On the website's [CPA Funding Process and Materials](#) page there is Newton-specific information on the project proposal process, proposal instructions and upcoming deadlines. The CPC regularly works with CPA funding applicants to ensure that their proposals meet the requirements and goals of Newton's CPA program.

Like most CPA communities, Newton will not always have enough CPA funding for all of its current and anticipated funding proposals. The Community Preservation Committee (CPC) relies on the following guidelines in determining which project proposals to recommend to the City Council for funding.

1. Project is drawn from or guided by Newton's regularly updated community-wide plans

The CPC relies on Newton's *Comprehensive Plan* and other regularly updated community-wide plans to prioritize Newton's CPA-eligible needs. Each funding proposal must cite at least two of these plans, most of which can be found on the [CPA Funding Process and Materials](#) page on the City of Newton's website.

2. Project helps to balance funding across all of the eligible CPA funding categories

The CPA legislation allows funding to be used for projects in Community Housing, Historic Resources, Open Space, and Recreation. It also requires communities to spend at least 10% of each year's new funds on each of three of those categories – Community Housing, Historic Resources, and Open Space. Funds may be allocated in the year they are received or retained for future projects. Unless exceptional needs require otherwise, Newton's CPC aims to end each year with approximately one year's worth of funds (currently about \$4.5 million) in reserve so that the program can respond quickly to unanticipated future opportunities. Unusually expensive projects, such as land acquisition or major capital

website www.newtonma.gov/cpa
 contact Lara Kritzer, Community Preservation Program Manager
 email lkritzer@newtonma.gov phone 617.796.1144

improvements to public buildings or parks, may also be funded by selling bonds that will be repaid from future local CPA revenue.

Newton's allocation targets for CPA funding in each eligible project category are intended to be flexible guidelines, not rigid quotas. These targets reflect Newton's past funding patterns, available information about possible future proposals, and feedback on the City's priorities received through community surveys and public hearings.

Newton CPA Allocation Targets: Balancing Funds Across Resources	
Community Housing (statutory minimum 10%)	35%
Historic Resources (statutory minimum 10%)	20%
Open Space (statutory minimum 10%)	20%
Recreation	20%
CPA Program Administration	5%

The final two pages of this *Plan* compare the allocation of current and future funding requests to these targets.

3. Projects leverage non-CPA funds to achieve community goals

The CPC prioritizes projects that are not only eligible for CPA funding but which also leverage their CPA funding to achieve the maximum possible funding from other sources. The CPC also recognizes that a project may need a relatively high share of CPA funding in its initial phases (such as design) in order to raise funds primarily from non-CPA sources for its later phases (such as construction). In reviewing the CPA fund's financial contribution to a project, the CPC may choose to look at individual project phases or the project as a whole. The CPC prefers to see a minimum of 50% funding match for all CPA projects whenever possible, but may allow for a lower percentage match depending on the project and its overall benefits to the community. Municipal projects will be given more flexibility and have a lower preferred target match of 30%.

4. Extent to which the Project benefits the Community

The CPC will take into consideration the location of the project and its impact both on its surrounding neighborhood and the City as a whole. Projects which involve publicly (municipal) or privately owned assets that benefit all Newton residents and neighborhoods may be given more weight than projects which will have a more limited impact on the community. Community Housing is generally considered as having a wide public benefit to the City as a whole when it is both deed-restricted to ensure permanent affordability and proactively marketed to all eligible households.

When existing municipal assets, whether it be buildings or landscapes, are considered for CPA funding, the CPC must be careful to distinguish between projects which might be considered general maintenance, and therefore are not eligible for CPA funding, and projects which are capital improvements to the site and may be funded. There is no set definition of general maintenance vs. capital improvement, and the CPC will make decisions on the eligibility of projects on a case by case basis. When appropriate, the CPC may recommend dividing the cost of an improvement so that the CPA funding is used to provide an additional benefit which the City might otherwise not be able to fund. For example, CPA funding could be used to pay the difference between replacing an historically significant slate roof with the more appropriate but more expensive slate rather than a less costly asphalt shingle alternative.

Projects which have a limited or no public benefit to the community are generally considered to not be eligible for CPA funding.

5. Extent to which the Project includes Sustainable Development Design Elements

The CPC supports the City's goal to reach carbon neutrality by 2050 and encourages all applicants to incorporate sustainability into their projects through design decisions such as: eliminating or reducing fossil fuel use; reducing embodied carbon, especially by reusing existing resources, prioritizing energy efficiency through methods like the Passive House standard, incorporating EV charging stations and/or solar panels, etc. CPA funding applicants should also consider that any projects over 20,000 sq. ft of new construction or substantial reconstruction will be expected to meet the City's Sustainable Development Design requirements as outlined in Section 5.13 of the Zoning Ordinance as the project goes through the Special Permit process. Additional information on these requirements is available on the City's website at: <https://www.newtonma.gov/home/showpublisheddocument?id=29553>

The CPC feels strongly that new CPA funded projects should move the City forward in meeting its sustainable energy goals and is aware that by adding in energy-saving measures a project may have higher upfront costs, particularly for renovations. The CPC encourages projects to incorporate all relevant energy efficiency and electrification measures into their proposals to be included in their discussions with the CPC. Any project which does not include these elements will be expected to provide a written explanation as to why they cannot be incorporated into the project with their funding proposal.

6. Project managers have a proven capacity for project management and long-term maintenance

Newton's CPC requires each proposal to identify both a qualified, available project manager and a reliable source of non-CPA funding for future maintenance. The CPC also considers each proposal sponsor's past record of project management and maintenance when reviewing new proposals from that sponsor.

These requirements help Newton to avoid repeating past experiences with projects that took far more time or public funding to complete than originally anticipated or promised, and to comply with the state CPA statute's prohibition on using CPA funds for maintenance and operations.

7. Evaluate completed projects to ensure accountability and improve future projects

Once a project is funded, the CPC requires regular progress reports. For all non-City projects, the final release of CPA funds is contingent on a final in-person presentation and written report to the CPC. City project managers are also expected to provide final reports to the CPC on CPA-funded City projects.

The CPC monitors completed projects indefinitely, to evaluate the community's long-term returns on its CPA investments, and to learn how well – and why – different projects are maintained with non-CPA funds.

**Community Preservation Act Funds
Current Status of Active Funded Projects**

Fiscal Year	Project Title	Address	Funding Category	CPA Funding Appropriated	Total Expended to Date	CPA Funds Remaining	Notes on Progress
FY22	Athletic Fields Improvements	Four to Six Sites (See Project Website)	Recreation	\$420,000	\$134,962	\$285,038	Work in progress - Parks and Rec working with two consulting firms who will share the design work
FY21	Coleman House Senior Housing Preservation	677 Winchester Street, Newton Highlands	Community Housing	\$4,214,622	\$3,793,160	\$421,462	Work in progress - Funding expended up to 10% hold back
FY21, FY23	Commonwealth Avenue Carriageway Redesign	Auburndale - Charles River to Lyons Field	Recreation	\$523,002	\$438,015	\$84,987	Design work in progress - Addnl Funding approved Aug 8
FY16, FY17	Crescent Street Site Assessment, Feasibility and Design	70 Crescent Street, Auburndale	Community Housing/Recreation	\$360,000	\$225,403.00	\$134,597.00	Project on hold since 2018.
FY21	Gath Memorial Pool Feasibility Study	256 Albemarle Road Newtonville	Recreation	\$60,000	\$58,700	\$1,300	Project complete?
FY23	Gath Memorial Pool Enhancements - Phase II	256 Albemarle Road Newtonville	Recreation	\$486,500	\$3,600	\$482,900	In Progress - Bargmann Hendrie + Archetype will complete once Phase I finalized
FY19, FY21	Golda Meir House Senior Housing Expansion (Stanton Avenue)	160 Stanton Ave, Auburndale, MA 02466	Community Housing	\$4,494,857	\$4,045,371	\$449,486	Project underway - Four requisitions to date and have used all funding except 10% retainage
FY21	Grace Episcopal Church Tower Restoration	70-76 Eldredge Street, Newton Corner	Historic Resources	\$1,433,000	\$1,022,254	\$410,746	Work wrapped up for the winter. Anticipated completion Spring 2023. Preservation Restriction drafted and sent to applicant for review.
FY19, FY21	Haywood House Senior Housing Development	Jackson Road (behind 83-127 Kennedy Circle), Newton Corner, MA 02458	Community Housing	\$3,077,900	\$2,769,910	\$307,990	Occupancy anticipated for March 2023 - have used all funding except 10% holdback to date
Multiple	HISTORIC BURYING GROUNDS 3, East Parish Burying Ground	Newton Corner, MA 02458	Historic Resources	\$208,700	\$164,454	\$44,246	Retaining wall work complete, replacement fencing in progress
FY23	Jackson Homestead Basement Rehabilitation, Phase I	537 Washington Street, -2458	Historic Resources	\$75,000	\$0	\$75,000	City Council approved funding Oct. 3, 2022.
FY21	Jackson Homestead Fence Replacement	537 Washington Street, -2458	Historic Resources	\$28,990	\$2,200	\$26,790	Project originally delayed to 2022 - now working with new vendor and waiting for new proposal
FY22	Levingston Cove Improvements Project	Crystal Lake, Lake Avenue, Newton Highlands	Open Space/Recreation	\$1,440,344	\$153,283	\$1,287,062	Work underway
FY22	New Art Center/Church of the Open Word Restoration	19 Highland Avenue, Newtonville	Historic Resources	\$94,600	\$0	\$94,600	Jan 2023 - Study work largely complete. New Art currently in negotiations with property owner for purchase of building
FY23	Newton Affordable Housing Trust	Various	Community Housing	\$1,948,056	\$0	\$1,948,056	Trust waiting for future applications.
FY22	Newton Architectural Survey, 1940-1972	Various	Historic Resources	\$17,500	\$4,950	\$12,550	Phase I completed 1/6/23.
FY18	NEWTON CEMETERY Whipple-Beal Cast Iron Fence	791 Walnut Street, Newton Center, MA 02459	Historic Resources	\$60,000	\$54,000	\$6,000	Final Report Approved; Preservation Restriction sent to MHC for final signatures
FY22	Newton Community Farm	303 Nahanton Street, Oak Hill	Historic Resources	\$88,554	\$49,899	\$38,655	First Water Infiltration and HVAC work complete. The Kitchen Ceiling and Water Heater have been determined to be fine. Only things left to do is electrical upgrade work.
FY20	NEWTON CONSERVATORS, Conservation Restrictions (Kesseler Woods)	200 Vine Street (bordered by La Grange St.), Chestnut Hill, MA 02467	Open Space	\$15,000	\$0	\$15,000	On hold pending completion of Conservation Restriction
FY04, FY06, FY09, FY14, FY15	Newton HOMEBUYER ASSISTANCE Program, Phases 1-5	Citywide	Community Housing	\$3,209,050	\$2,584,958	\$624,092	In Progress
FY22	Nonantum Village Senior Housing Preservation	241 Watertown Street	Community Housing	\$500,000	\$246,290	\$253,710	Roof work complete, HVAC equipment purchased
FY20	PIGEON HILL TRAIL (Riverside Greenway) Design	Connecting Evergreen Street to Lasell Boathouse to Charles Street in Auburndale, including two underpasses under Interstate 90	Recreation	\$50,000	\$3,737.93	\$46,262	10/4/22 - Working with MassDOT to coordinate design/build contract with upcoming work on I90 and would like to use CPA funding to integrate this project into the larger construction work. Anticipate requesting a time extension for this work.
FY20	Webster Woods/ 300 Hammond Pond Parkway (Land Acquisition)	300 Hammond Pond Parkway, Chestnut Hill, MA 02467	Open Space	\$15,740,000	\$15,219,426	\$520,574	Includes both purchase funds and legal fees. Remaining funds include legal fees and discount received from bond sale; Conservation Restriction in Progress.
FY22	West Newton Armory Affordable Housing Development	1135 Washington Street	Community Housing	\$3,000,000	\$0	\$3,000,000	City Council approved funding July 11, 2022. Grant Agreement under review by applicant.
Project Totals				\$41,545,675.00	\$30,974,572.75	\$10,571,102.26	

February 2023 Potential Future Project List

Potential Project Name	Applicant	Potential Funding Request	Category	Description	Timeline	Other
Adams Street Shul	Adams Street Shul	\$10,000 (or less)	Historic Resources	Restoration of Historic Front Doors, possible masonry work	TBD	Initial discussion Aug. 2022
Albemarle Park Renovations	Parks, Recreation and Culture	\$5 million	Recreation	Reconfigure and Rehabilitate all fields including pathways based on study currently underway	Fall 2023	Rough Estimate of \$7 million for all four parks projects
Brown and Oak Hill Fields Restoration	Parks, Recreation and Culture	\$500,000	Recreation	Restore/Rehabitate/Reconfigure based on study currently underway	TBD	Rough Estimate of \$7 million for all four parks projects
Burr School Fields Restoration	Parks, Recreation and Culture	\$500,000	Recreation	Restore/Rehabitate/Reconfigure based on study currently underway	TBD	Rough Estimate of \$7 million for all four parks projects
Dudley Road Estate	?	TBD	Open Space/ Recreation/ Community Housing	Purchase of land for conservation and recreation and/or funding for additional affordable housing units	TBD	Could be requested for City's contribution to a larger development project with City partner.
First Baptist Church Bell Tower Restoration	First Baptist Church, Newton Center	TBD - initial discussion anticipated work to be in millions	Historic Resources	Restoration of badly deteriorated bell tower	TBD	Emergency work already underway to prevent tower's collapse. Study in progress to develop plan and estimates for restoration
Jackson Homestead Basement Restoration/ Rehabilitation	City of Newton, Historic Newton	TBD	Historic Resources	Construction funding for work to remediate water and humidity issues, address accessibility, preserve historic artifacts	TBD	Funding and timing information will be available following completion of current study
McGrath Park Restoration	Parks, Recreation and Culture	\$600,000	Recreation	Restore/Rehabitate/Reconfigure based on study currently underway	TBD	Rough Estimate of \$7 million for all four parks projects
Municipal Historic Structure Building Envelope Study	Public Buildings	\$100,000	Historic Resources	Funding to review and assess building envelope on up to 15 city owned historic structures	TBD	Invitation issued for full proposal Oct. 2021 - Project on hold
Pellegrini Field House Restoration	Public Buildings	TBD	Historic Resources	Funding to restore exterior of existing Fieldhouse at Pellegrini Playground	TBD	
Warren House Exterior Restoration and Preservation	Newton Community Development Foundation	\$4.1 million	Historic Resources	Exterior masonry work and window repair/replacement on former middle school building. Property has a preservation restriction given to the City for prior CPA funded work	2023-2024	Property is going through refinancing process which will impact timing of the work.
Estimated Funding Requests At This Time: \$13,000,000 - \$16,000,000						
New Trail	Conservation Committee	TBD	Open Space/ Recreation	Create Trail from Harwich Road to Lagrange		City has some funding but not anticipated to be enough for boardwalk and bridge needed in area
Newton Highlands Women's Club Building	Newton Highlands Women's Club	\$60,000	Historic Resources	Restoration work on existing historic building	?	Initial email conversations with Alice in 2019, me in 2020 - no specifications on work to be done as of March 2020
Norumbega Conservation Area	Conservation Committee	TBD	Open Space/ Recreation	Convert the main oval path at Norumbega Conservation Area and the path at the Upper Falls Riverwalk Conservagtion Area to stone dust or crushed stone for accessibility		
Potential Accessible Affordable Housing Project	55 Chinian Path	?	Community Housing	Purchase existing property and construct fully accessible affordable group home.	Unknown	ca. 1940s House currently used as affordable group home. CT organization contacted City interested in purchasing and redeveloping site
Historic Properties Grant Program	TBD		Historic Resources	Grant Fund to pay for difference between repairs and historically correct rehabilitations/repairs on eligible properties		Cambridge has similar program - others?
Small Scale Affordable Housing Projects	TBD	\$300,000	Community Housing	Funding to restore, rehab, and/or preserve existing affordable housing units in Newton		Funding to restore, rehab, and/or preserve existing affordable housing units in Newton
Affordable Housing Plan	Affordable Housing Trust	TBD	Community Housing	Community Affordable Housing Plan to assist new Affordable Housing Trust on determining needs of community, potential uses for Trust funds		
Upper Falls Greenway	Conservation Committee	TBD	Open Space/ Recreation	Install steps between the Upper Falls Greenway to conservation land in south and Braceland Park in north	?	

City of Newton Community Preservation Committee

Finances At a Glance

As of May 7, 2023

Fiscal Year 2023

Revenue

Beginning balance	6,309,217
Local CPA surcharge	3,980,772
State match	
Budget for this FY	771,569
Additional from prior FY	714,416
Total Available Resources	11,775,974

Expenses

Bond repayment obligations	694,353
New funding authorizations	6,742,345
Administrative costs	179,376
Total Expenses	7,616,074

Current Fund Balance 4,159,900

Fiscal Year 2024

Revenue

Beginning balance	4,159,900
Local CPA surcharge	4,120,278
State match	
Budget for this FY	796,154
Additional from prior FY	703,910
Total Available Resources	9,780,243

Expenses

Bond repayment obligations	694,853
New funding authorizations	-
Administrative costs	182,907
Total Expenses	877,760

Projected Fund Balance 8,902,484

Spending Compared to Program Area Targets

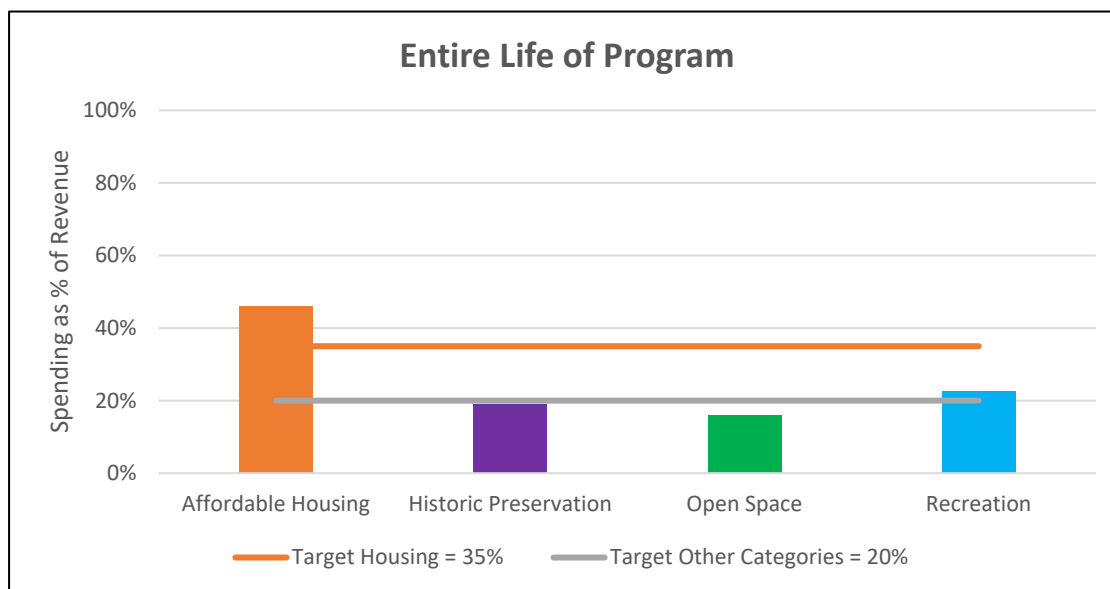
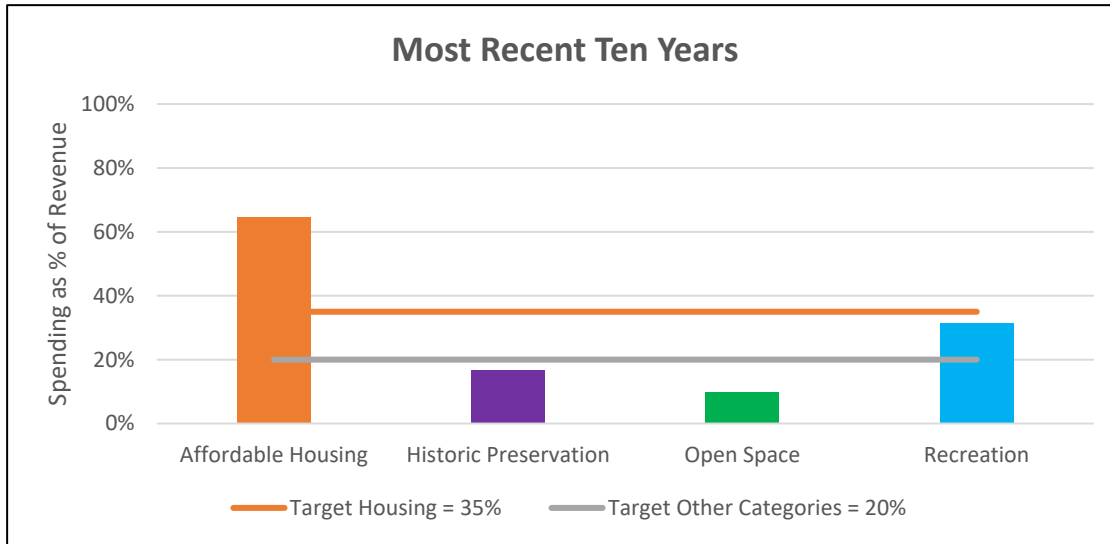
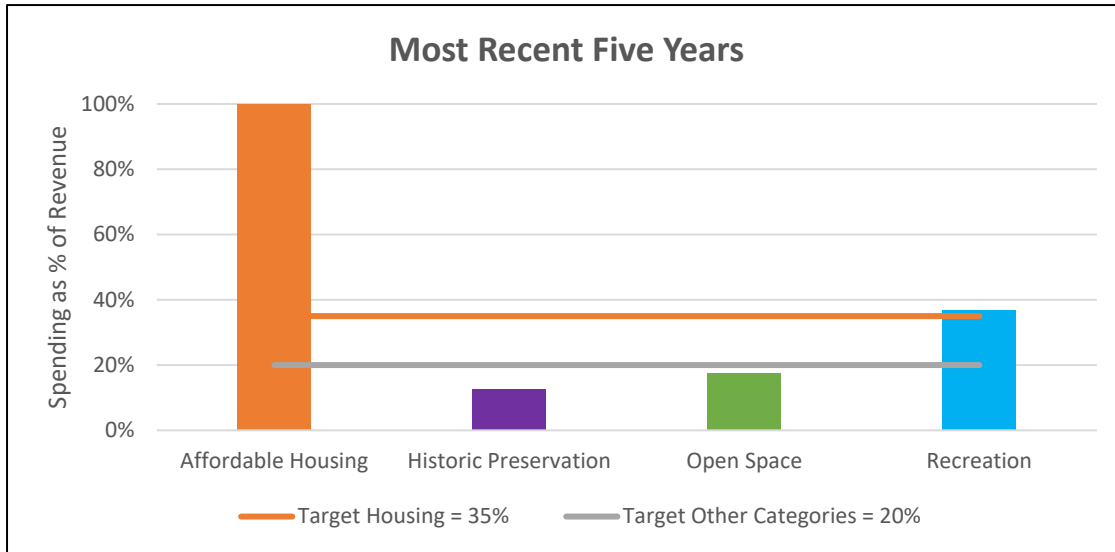
Comparisons Based on % of Current Revenue

As of May 7, 2023

Note: spending on projects funded through bond issues is recorded as a series of annual debt service payments

	Program Area					Total Spending	Total Current Revenue
	Affordable Housing	Historic Preservation	Open Space	Recreation	Administration		
Most Recent Five Years							
Spending	21,085,829	2,354,528	3,235,723	6,814,064	713,752	34,203,896	18,434,168
% of Total Current Revenue	114%	13%	18%	37%	4%		186%
Target %	35%	20%	20%	20%	5%		100%
Percentage Point Difference Between Actual and Target	79%	-7%	-2%	17%	-1%		
Most Recent Ten Years							
Spending	24,134,232	6,291,367	3,744,223	11,803,561	1,311,299	47,284,682	37,398,625
% of Total Current Revenue	65%	17%	10%	32%	4%		126%
Target %	35%	20%	20%	20%	5%		100%
Percentage Point Difference Between Actual and Target	30%	-3%	-10%	12%	-1%		
Entire Life of Program							
Spending	35,679,883	14,760,781	12,347,601	17,477,806	2,476,518	82,742,589	77,536,558
% of Total Current Revenue	46%	19%	16%	23%	3%		107%
Target %	35%	20%	20%	20%	5%		100%
Percentage Point Difference Between Actual and Target	11%	-1%	-4%	3%	-2%		

Spending as % of Program Revenue, Compared to Guidelines



Spending Compared to Program Area Targets

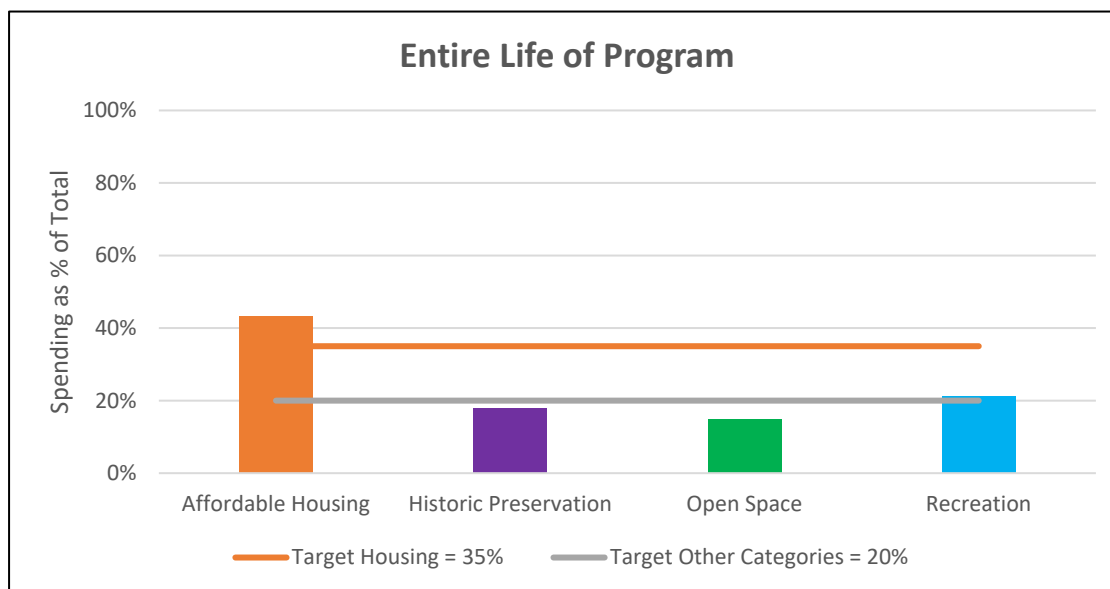
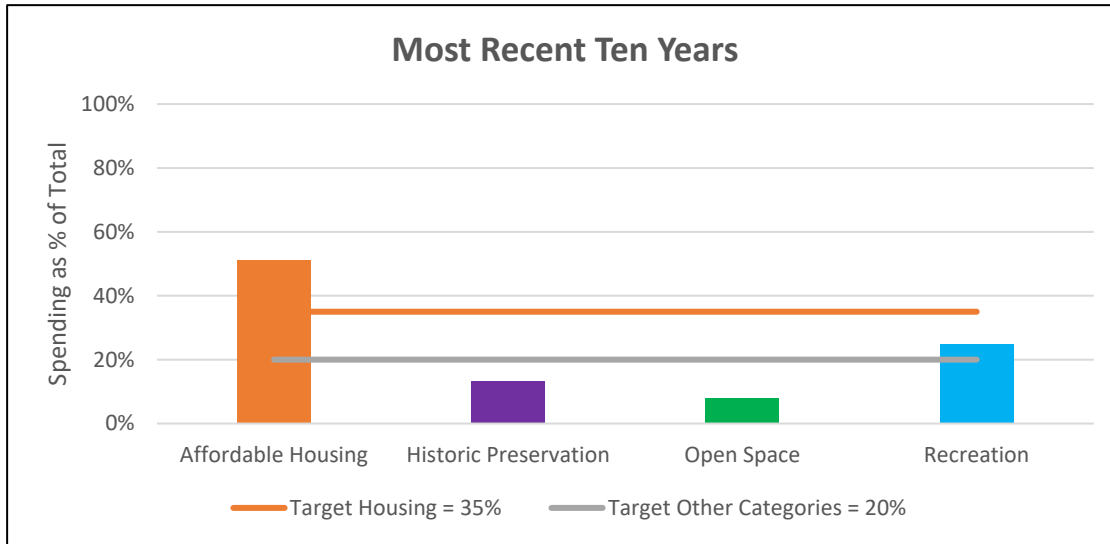
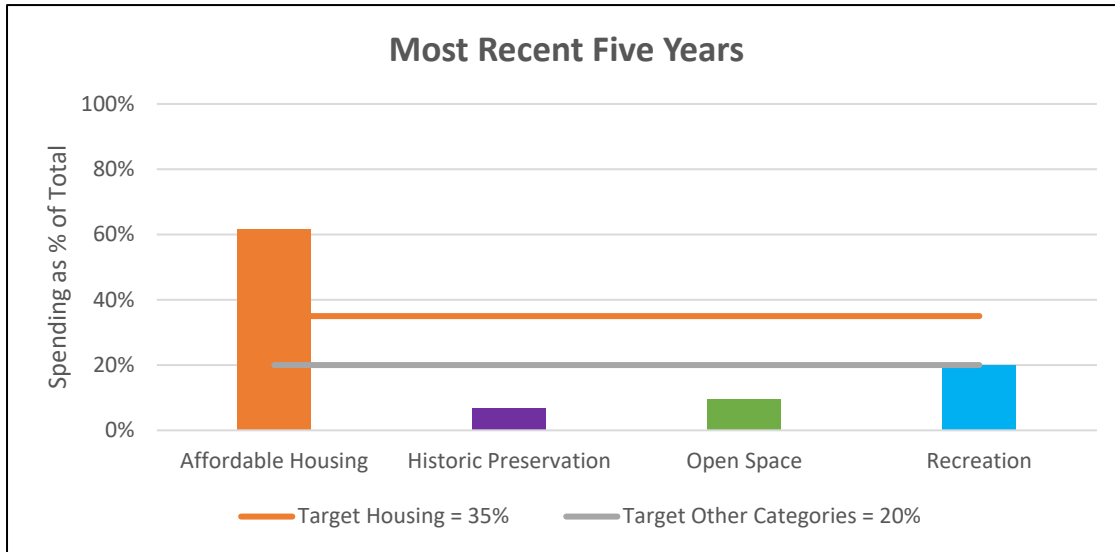
Comparisons Based on % of Current Spending

As of May 7, 2023

Note: spending on projects funded through bond issues is recorded as a series of annual debt service payments

	Program Area					Total Spending
	Affordable Housing	Historic Preservation	Open Space	Recreation	Administration	
Most Recent Five Years						
Spending	21,085,829	2,354,528	3,235,723	6,814,064	713,752	34,203,896
% of Total	62%	7%	9%	20%	2%	100%
Target %	35%	20%	20%	20%	5%	100%
Percentage Point Difference Between Actual and Target	27%	-13%	-11%	0%	-3%	
Most Recent Ten Years						
Spending	24,134,232	6,291,367	3,744,223	11,803,561	1,311,299	47,284,682
% of Total	51%	13%	8%	25%	3%	100%
Target %	35%	20%	20%	20%	5%	100%
Percentage Point Difference Between Actual and Target	16%	-7%	-12%	5%	-2%	
Entire Life of Program						
Spending	35,679,883	14,760,781	12,347,601	17,477,806	2,476,518	82,742,589
% of Total	43%	18%	15%	21%	3%	100%
Target %	35%	20%	20%	20%	5%	100%
Percentage Point Difference Between Actual and Target	8%	-2%	-5%	1%	-2%	

Spending as % of Annual Spending, Compared to Guidelines



Spending History

Note: for projects funded by bond issues, list only the annual debt service payments on this sheet

Fiscal Year	Project	Phase	Debt Service Payment?	Affordable Housing	Historic Preservation	Open Space	Recreation	Administration	Total	Status
2025	Athletic Fields Improvements	Construction Phase III Funding: debt - 15 year	Debt				458,680		458,680	Rec'd by CPC
2025	Gath Pool Enhancements	Phase III - Construction debt 30 year	Debt				337,402		337,402	Rec'd by CPC
2024	Administration							182,907	182,907	Approved
2024	Webster Woods		Debt			694,853			694,853	Approved
2023	Administration							179,376	179,376	Approved
2023	Webster Woods		Debt			694,353			694,353	Approved
2023	Newton Affordable Housing Trust Fund			1,948,056					1,948,056	Approved
2023	Jackson Homestead Basement Rehabilitation	Phase I			75,000				75,000	Approved
2023	Gath Pool Enhancements	Phase II - Design and Construction Documents					486,500		486,500	Approved
2023	Commonwealth Ave Carriageway Redesign	Additional Funding to Complete Final Design					133,002		133,002	Approved
2023	Warren House Preservation and Rehabilitation				2,100,000				2,100,000	Funds requested
2023	Athletic Fields Improvements	Construction Phase III Funding: current funds					4,099,787		4,099,787	Rec'd by CPC
2022	Administration							131,298	131,298	Actual admin
2022	West Newton Armory Affordable Housing	Construction of 43 Affordable Housing Units		3,000,000					3,000,000	Approved
2022	Webster Woods	Bond Payment	Debt			693,103			693,103	Approved
2022	Grace Church Tower Restoration	Stone tower stabilization and restoration			441,755				441,755	Approved
2022	Levingston Cove Improvements Project	Construction of open space/recreation amenities				288,069	1,152,275		1,440,344	Approved
2022	Athletic Fields Improvements	Design through construction of six sites					420,000		420,000	Approved
2022	Nonantum Village Place Affordable Housing	Roof, Siding and HVAC Repair/Replacement		500,000					500,000	Approved
2022	New Art Center/Church of the Open Word Restorati	Feasibility and Design			94,600				94,600	Approved
2022	Newton Architectural Survey 1940-1972	140 Inventory Forms			17,500				17,500	Approved
2022	Newton Community (Angino) Farm Farmhouse Rehabilitation and Restoration Project				88,554				88,554	Approved
2021	Administration							125,572	125,572	Actual admin
2021	Coleman House Preservation			4,214,622					4,214,622	Approved
2021	Commonwealth Ave Carriageway	Initial Funding for Redesign					390,000		390,000	Approved
2021	COVID-19 Emergency Housing Assistance	Phase 2		724,124					724,124	Approved
2021	Durant-Kenrick Homestead	4 Gutter and Window Repair			16,884				16,884	Approved
2021	Gath Pool Enhancements	Design study					60,000		60,000	Approved
2021	Golda Meir House Expansion			1,244,857					1,244,857	Approved
2021	Grace Church Tower Restoration	Stone tower stabilization and restoration			991,245				991,245	Approved
2021	Haywood House Senior Living			77,900					77,900	Approved
2021	Jackson Homestead Museum	Fence Replacement			28,990				28,990	Approved
2021	Webster Woods		Debt			697,699			697,699	Approved
2021	West Newton Armory Affordable Housing			21,270					21,270	Approved
2020	Administration							145,932	145,932	Actual admin
2020	COVID-19 Emergency Housing Assistance	Phase 1		2,000,000					2,000,000	Approved
2020	Kessler Woods	Newton Conservators CR oversight				15,000			15,000	Approved

City of Newton



Ruthanne Fuller,
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Barney S. Heath
Director

Community Preservation Committee

DRAFT MINUTES

February 14, 2023

The virtual meeting was held online on Tuesday, February 14, 2023, beginning at 7:00 P.M. Community Preservation Committee (CPC) members present included Dan Brody, Eliza Datta, Byron Dunker, Susan Lunin, Robert Maloney, Jennifer Molinsky and Judy Weber. Committee Members Mark Armstrong and Martin Smargiassi and were not present for the meeting. Community Preservation Program Manager Lara Kritzer was also present and served as recorder.

Chair Jennifer Molinsky opened the Community Preservation Committee's public meeting and introduced the CPC members present at this time.

Update on Current and Future Recreation Projects from the Parks, Recreation, and Culture Department

Commissioner Nicole Banks and Director of Parks and Open Space Luis Perez Demorizi presented the Committee with the Parks, Recreation, and Culture Department's Comprehensive Improvements and Maintenance Plan Update. Mr. Demorizi explained that they would also provide a quick update on the progress with the Athletic Fields project, Levingston Cove, and the upcoming groundbreaking for the Marty Sender Path. He noted that 62% of the open space in Newton is dedicated to public use and reviewed those public owners. Mr. Demorizi explained that the Citywide Open Space Analysis had looked at the amount of space needed for athletic fields versus other open space needs and found that only 8% of all open space in Newton is dedicated to athletic fields, while an additional 25% is school and municipal public land. He noted that there is a growing need for more multipurpose fields but that the remaining open land has difficulties. Much of it was located in low lying areas that needed to be drained and there was little flat land available so the City needed to get creative as to how it would proceed. Mr. Demorizi next reviewed their proposed implementation strategy and five plan objectives.

Mr. Demorizi explained that they had developed this project using prioritization criteria. The first of these was to increase ongoing maintenance by putting in more effort and budget into the fields. He noted that the Parks and Recreation's maintenance budget has grown 757% since 2019. Second, they had looked at their capital project management work by creating a new Parks and Open Space Division within the Department. In addition to having new staff available to work on these spaces, they also were working to standardize materials and processes. Mr. Demorizi noted that they Department was also considering how to expand synthetic field use by installing them at two new locations and were planning to install new lighting systems throughout the City to expand playing

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opportunities at both large and small facilities. He explained how the City was also managing the field usage now so that it did not need to worry about wear. Lastly, Mr. Demorizi explained how they had managed this work while also continuing to address other multi-year projects included in the City's Capital Improvements Plan (CIP). He noted that they had recently completed the installation of new lighting at Newton South High School and would be installing lighting at Newton North High School over the summer.

Mr. Demorizi next moved to a review of the three sites that were anticipated to be included in the upcoming CPA construction funding application. He explained that the work at Albemarle Park had been broken into two phases – Phase I in the north half of the park and Phase II in the south half. Phase I proposed to modify the northern half of the park by repositioning the baseball field to allow for more multipurpose space. They would also be removing and replacing the existing sports lighting and installing new lighting at Murphy Little League Field. This Phase I work was anticipated to cost \$7.1 million with both equipment and amenities including lighting, synthetic turf, contingency funds, etc. The Burr School fields were currently very sloped and were not considered to be a safe place to play. Work in this location would include leveling the site to expand its useability and adding a perimeter walking path and landscaping. The new fields would allow for flexibility in future uses and would cost \$1.62 million. Mr. Demorizi noted that they hoped to be able to use sustainable fill that was already stored at another City site. The third site, McGrath Field, currently had four fields which were considered to be unsafe due to limited run out zones. They were planning to remove the baseball diamond and install three new fields with new walking paths and trees at a cost of \$769,340. He noted that elsewhere they were primarily altering land surrounding baseball diamonds and that they would leave as much land untouched as possible. The overall cost for all three sites was anticipated to be \$9,487,983.

Commissioner Banks noted that for Albemarle Park, they would be decommissioning the existing tennis courts and installing new pickle ball courts. Ms. Molinsky asked about the basketball courts and was told that they would remain in place. Mr. Demorizi explained how that area would be reorganized and reconfigured. Ms. Molinsky noted that the southern half of Albemarle Park was not included in the proposal and Commissioner Banks confirmed that that half would be completed separately in the future.

Ms. Lunin asked about the lacrosse facilities at McGrath park. Mr. Demorizi explained that they planned to fundraise for a lacrosse practice wall area to be installed there. Ms. Molinsky asked about anticipated lifespan of the fields assuming appropriate maintenance. Mr. Demorizi answered that a grass field can last 30 years before needing a full depth renovation while a synthetic turf field needed to be renovated every 10 years. For synthetic turf, the carpet needed to be replaced every ten years while the infill/pellets could be used twice. He also noted that the lighting fixtures had a 25 year warranty but were anticipated to last 50 years and that the pool was anticipated to have a 50-60 year lifespan.

Mr. Brody asked about the other three sites that had been included in the preliminary planning work. Mr. Demorizi stated that Forte Park, Braceland Park, and the Brown/Oak Hill School fields were being planned for the next phase of construction. Mr. Demorizi explained that the upcoming work on finalize the design and construction for Albemarle Park would help to guide how they proceeded with the remaining three sites.

Mr. Brody thought that the Committee would need to issue bonds to pay for these projects and thought that it would be helpful to have a ballpark number for work at those last three sites as well. He asked when the Department planned to finalize the Gath Pool project and Mr. Demorizi answered that they planned to have a full application ready for the March meeting. Mr. Brody thought that the Committee would need these numbers before it could send any bonding recommendations to the City Council for approval. He thought that the length of the bond would come back to the lifespan of the elements involved in the project and thought it would be useful to have a recommendation from Parks and Recreation on the potential length of the bond. Commissioner Banks stated that she wanted to meet with the City's Financial team and Ms. Kritzer to discuss how the bonding could be structured. There was agreement that Gath Pool was the greatest need at this time and that it made sense to complete the work on Albemarle North at the same time. She explained that the other sites could potentially be staged and explained how they were planning to address the needed work. For example, the Burr fields were important to expanding the available field play space and so would be done early in the plan. For the remaining three fields, they were in early discussions on what made sense to do next but had not worked out the details or completed any high level numbers on those yet.

Ms. Datta asked if there were any benefits or efficiencies in combining all of the fields into one package and doing them at the same time. Mr. Demorizi stated that their goal was to find efficiencies in the process and that they were looking to have some funding allocated to each of the proposed sites so that as soon as they were done with Burr they could move to McGrath and so on. He explained that they had to balance which fields would be open and closed and felt that they were developing a good sequence for that work. Ms. Datta noted that McGrath Field had some matching funds and asked the applicant to provide more detail on that funding in the pre-proposal. Mr. Demorizi stated that that information would be included and that they were continuing to have conversations on those and other matching fund opportunities.

Mr. Maloney stated that he had a follow up bonding question about the other fields that were not included in the current project. He thought that it would be useful to have some idea of what other Recreation funding needs might come up during the life of the bond as he would like the CPC to have enough funding available for those as well. Commissioner Banks stated that they would continue to develop broad estimates as part of their capital spending. She stated that as a Department, they worked to develop maintenance plans and schedules that would help to avoid the extent of these types of projects in the future. She added that they were also looking for other funding sources that they could access in the future and were working with the Planning Department to potentially use development mitigation payments for Braceland Park and to pull from other resources. Commissioner Banks noted that while there were some efficiencies in doing several projects at the same time, they also recognized the need to work hard to identify future funding sources.

Mr. Brody noted the City's CPA program's bonding history and how it had approached bonding for Webster Woods. He explained that the CPC's goal was to spend 20% of its annual funding on Open Space and that the Committee had ultimately decided that it was most comfortable with setting aside 10% of its annual funding for that payment. He thought that they would need to do similar planning for this site but that they needed to have a clearer sense of what was out there and what the City was comfortable with bonding and spending first.

Review of Pre-Proposal for Phase III of the Gath Memorial Pool Renovation Project

Consultant Tom Scarlata, Bargmann Hendrie + Archtype (BH+A), made the presentation on the current plans for the updated Gath Pool. He began by noting that the design of the pool had changed in July 2022 from one pool with a large spray deck to a two pool design which included a recreational pool and an eight lane lap pool. The splash pad area had been narrowed and one ramp and walkway area removed. The new design would now allow full access to all sides of both pools as well as a zero-entry area and a new ramp leading into the competition pool. The redesigned spray pad would still be two levels and the existing bathhouse would be retained but renovated to provide full accessibility, direct access through the building to the pool, and new gender neutral changing areas as well as a more generous area for checking in and registering. The project would add a new ramp to the front of the site as well as new steps and fencing. Mr. Scarlata pointed out the new hip roofed shade structures that would be installed around the decks and explained that they were looking at more permanent metal structures for the shades to save in both maintenance and durability. These could also be used for solar in the future if needed. On the lower level of the bathhouse, they were creating a new second means of access out of the filter room and redesigning the space to provide better solutions for maintenance and safety.

Mr. Scarlata explained that the competition pool would have eight lanes of equal size and depth. A ramp was part of the pool design and a lift would also be added along with two diving boards. Mr. Scarlata noted the multiple options for use here and how the pool had been designed for multiple users. The recreation pool would include a 0 entry area with a splash area as well as a walking area that could also be used for laps and a general play/exercise area. He explained how the two pools would have two separate filter systems and reviewed their features and benefits. The spray deck had a new linear design on two tiers with universal accessibility. The space was designed for toddler through pre-teen use and would have an impervious, slip-resistant but soft surface. This area was designed so that it could be used even when the pool was closed and their team was beginning to look at the specific water features to be installed. Four new shade structures would be installed on the east side of the pool with two more to be located on the north side and another adjacent to the bathhouse. Mr. Scarlata noted the new storage area that would be created adjacent to the bathhouse which would allow them to open up the deck space. He also pointed out how the space had been designed to allow for better viewing during swim events and showed further plans and overall views of the site.

A breakdown of the proposed \$7.2 million was reviewed and it was noted that it included \$967,000 in contingency funding due to the current environment. Commissioner Banks stated that she was excited to be bringing this project forward and to see it completed next year as a fully accessible facility with eight lap lanes significant improvements to the decks and shade areas. She stated that they were looking forward to having the new pool facility open for the following summer season.

Ms. Molinsky thought that it looked like a great design and asked if the two pools was the reason for the two filter systems. Mr. Scarlata answered yes and explained that the water needed to be turned over every four hours in the recreation pool versus every six hours in the lap pool. He also noted that the spray system would recirculate the water every 25 minutes. Mr. Scarlata added that the two pool design allowed for better access to the far side of the pools, more flexibility in uses, and full access to the lap pool. Commissioner Banks stated that the design provided full accessibility to both pools and had allowed them to pick up more deck space for seating and shade areas. Ms. Molinsky asked if the

budget shown was the full budget and if the amount requested from the CPA fund was just over \$5.8 million. The applicants answered yes.

Mr. Maloney noted that the Committee had received several letters with concerns about the depth of the pool and asked if the starting blocks could be located at the deep end. Commissioner Banks stated that that was an option and that the deep end of the pool would be 12 feet deep in all lanes. Mary Pohlman stated that the current pool went from 4.5' to 6' at its shallow end. She explained that 6' was recommended for diving but that 4' was the current requirement. The new lap pool was proposed to be designed with a consistent 4' shallow end and they were concerned with younger divers since their races start at the shallow end.

Ms. Weber thought that the design process seemed to have gone smoothly and asked if the Parks and Recreation Commission felt that they were finished with the design. Mr. Demorizi answered that they had taken a lot of input on the design and were still finalizing it but felt that the design was pretty advanced. He stated that a lot of thought had gone into the plans and a lot of changes made over time. He also noted that the plans had been reviewed by the Parks and Recreation Committee and the Commission on Disabilities. Commissioner Banks agreed with Mr. Demorizi on the level of care and review that had gone into the designs.

Mr. Scarlata noted that future races could be started in the deep end and noted that the City also wanted to use the lap pool for recreation use, the standard for which was 4' shallow end depth. He stated that Massachusetts's current regulations did not have depth requirements for starting blocks and noted the requirements in other locations. He explained that they had tried to design the best competition course that they could while also providing an adaptive design. Commissioner Banks added that they had reviewed the proposed design and uses alongside other pools in the area and could not find any other pools with 6' shallow ends. She stated that this needed to be a pool which worked for the whole community, which is why they had designed it with a 4' shallow end. Mr. Demorizi also pointed out that the ADA compliant ramp leading into the lap pool ended in the 4' end and could need to be completely redesigned if the shallow end was 6' deep. The current ramp and pool design had achieved a careful balance and they could not maintain accessibility and equal depth lanes with a 6' shallow end. Ms. Molinsky asked about the dimensions of the Newton North High School Pool. Commissioner Banks stated that Parks and Recreation did not oversee that pool but that the current Gath Pool had a 4' shallow end.

Ms. Datta stated that it was great to see the design update and asked to hear more about any sustainable elements of the design in the full proposal. Ms. Weber asked if the original proposal had requested \$5 million. Mr. Demorizi answered yes and noted that the current plans were coming in at slightly more than they had originally thought. Ms. Molinsky stated that it would be helpful to include information on the longer term picture of potential future funding requests in addition to providing the information on sustainability and any other potential funding sources for the next discussion. Mr. Demorizi asked for more information on the CPC's sustainability guidance and Ms. Molinsky referred him to the Proposal Guidelines on the City Website. Commissioner Banks noted that one of the urgent problems with the current pool was its water loss issues and asked if that could be considered as a sustainable component of the project. Ms. Molinsky answered yes, as could their work on solar readiness and reusing of fill from other Newton sites. Ms. Lunin moved to invite the applicants to

submit a full proposal for the construction funding of the Gath Pool project. Mr. Maloney seconded the motion which passed by unanimous vote.

Status Report and Review of CPA Program Information Session

Ms. Kritzer reported on the work to proposed date for the information session and the potential agenda. She agreed to recirculate the list of organizations to be contacts to members for review. Members also discussed creating a handout for the meeting.

Review of Existing and Potential Future Projects

Members had a brief review of current and potential future projects at this time. Ms. Kritzer reported that she had contacted the New Art Center about the status of their project as requested. The New Art Center was in the process of negotiating the purchase of the property with the owners but had not reached an agreed price yet and discussions were still ongoing.

Review of Current Finances

Members reviewed the most recent Finances At A Glance update at this time.

Ms. Molinsky noted that bonding had been discussed as a potential option for the Recreation projects and asked what resources would be needed for the Committee to make that decision. Members discussed the extent of the Recreation projects and what other projects could be coming in in the next few years. Mr. Dunker noted that there were five fields that needed to be redone (Braceland and Oak Hill/Brown being the two that were not included in the current application) and that the rest of the City's fields would probably only need maintenance. Mr. Brody thought that the issue was the interest rate that the City could get for the bonds. He thought it would be helpful to find out if the City could anticipate what effective interest rate might be available for a bond issued in the next year. With that information, he thought the Committee could have a good understanding of what it would mean to bond the Gath Pool project for a set number of years. He thought the interest rate and length of time that the Committee and City were comfortable with were the most useful elements to consider. Ms. Molinsky wondered if it made sense to consider a mix of bonding and outright funding for the project and asked staff to check with the applicant on that question. Members agreed to hold an extra meeting on Tuesday March 7 to discuss the CPA bonding process and what it might look like to approve bonding for one or more of the upcoming recreation projects. Ms. Kritzer agreed to reach out to Mr. Demorizi prior to this meeting for more information on the recommended length of the bond and whether there was an ideal amount to bond.

Approval of January 10 Minutes

Members had reviewed the draft minutes prior to the meeting and Mr. Maloney had sent back revisions. Ms. Weber moved to approve the January 10 meeting minutes as revised. Mr. Maloney seconded the motion. The motion passed with 5-0-2 with Ms. Lunin and Mr. Dunker abstaining from the vote as they had not been present for the meeting.

Mr. Maloney moved to adjourn. Ms. Datta seconded the motion which passed by unanimous voice vote. The meeting was adjourned at 8:51 P.M.

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Barney S. Heath
Director

Community Preservation Committee

DRAFT MINUTES

March 14, 2023

The virtual meeting was held online on Tuesday, March 14, 2023, beginning at 7:00 P.M. Community Preservation Committee (CPC) members present included Mark Armstrong Dan Brody, Eliza Datta, Byron Dunker, Susan Lunin, Jennifer Molinsky and Judy Weber. Committee Members Robert Maloney and Martin Smargiassi and were not present for the meeting. Community Preservation Program Manager Lara Kritzer was also present and served as recorder.

Chair Jennifer Molinsky opened the Community Preservation Committee's public meeting and introduced the CPC members present at this time.

Public Hearing on the Phase III of the Gath Memorial Pool Renovation Project

Commissioner Nicole Banks, Director of Parks and Open Space Luis Perez Demorizi, Project Manager Rafik Ayoub, Aquatics Director Sean Nickerson and Consultant Tom Scarlata from Bargmann Hendrie + Archtype (BH+A) were present for the public hearing on the full proposal. Mr. Demorizi gave a PowerPoint presentation on the project and reviewed its design and process to date. He noted that the City had originally started with a one pool design but after community discussions had separated it into a recreation pool and lap pool design instead. The new pool design included a spray park and larger pool deck and was being coordinated into the larger plans for the redevelopment of the surrounding park. The renovated pool house had been designed to allow better flow and easier access, with new reorganized areas for first aid and lifeguard use. Mr. Demorizi reviewed the details of the pool designs, noting the zero entry locations, walking area with stair access, and splash down area in the recreation pool and how supervision and visibility had been improved with the new design. The new design also improved and increased the shade space available. He next reviewed the spray deck design, ramp access and congregating areas surrounding the pool and explained how they had improved accessibility to the site as well as visibility for those attending swim meets. Mr. Demorizi showed the elevations of the new pool and explained the proposed grading and stormwater improvements as well as the accessibility improvements surrounding the site and in the bathhouse. Returning to the design of the individual pools, he reviewed the depths and designs of each of the swimming areas and showed images from other similar pools to explain what the automatic lift, ramps and railings would look like in the new facility. Mr. Demorizi also noted that the new shade structures would have metal frames which would be ready for future solar installations.

Mr. Demorizi explained that the spray park would be adjacent to the pool and would include a 5' grade change while still providing universally accessible features. The water would be controlled by

website www.newtonma.gov/cpa

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actuators and recycled and the consultants and staff were working on specific features and design elements at this time. There would be no standing water and no lifeguard required for the space. The space had been designed to be separate from the pool so that it could be used when the pool was closed.

Mr. Demorizi explained the remaining elements of the new design and arrangements of the deck, storage areas, and secured covered areas before turning to the project budget. He noted that the total cost was estimated at \$7.2 million including both construction and staff time breakdowns. He reviewed their proposed CPA funding request and the funding identified from other sources before going on to show a full picture of the Department's Capital Improvement Budget of \$19 million for the pool and surrounding park area.

Discussion turned to questions from the Committee. Ms. Datta asked about the funding from the State. Commissioner Banks stated that the State had confirmed that earmarked funds were available in the current year budget but these funds still needed to be accepted by City Council. It was also noted that the currently proposed budget was the same as the one included in the pre-proposal.

Ms. Molinsky opened the discussion to the public at this time. Councilor Downs stated that she was excited by the plan and all the accessibility features as she felt that it was important for the facility to be as accessible as possible. She encouraged the applicants to continue to work on the details with the Bluefish Swim Team which had concerns about the depth of the lap lanes. Councilor Wright raised questions about the proposed ladder and gutter systems in the lap pool, noting that the current systems were somewhat of a hazard. Mr. Scarlata explained how the lap pool would be set up with 8' lanes and lap lane marks and noted that this would allow the ladders to be installed without interrupting the lanes. The new pool would have a recessed gutter system on either end that would be flush with the pool wall which created a better surface for the end of the pool as well. He noted that the new pool would be slightly wider than the existing one with better end conditions and lanes which were all identical in width and depth. He added that the deep end would also have recessed toe holds in the walls.

Councilor Kelly thought that it was important to see the progress in this project and was looking forward to the updated facility. She noted how the project had developed over the course of its reviews with the CPC and was glad to see where it was at this time with the two pool design. She asked for more information on the viewing and spectator areas surrounding the pool. Mr. Scarlata explained that the viewing area would be from the ramp and area along the south side of the pool where a level concrete walkway and deck would be installed. They were also pushing back the east wall of the existing facility which would allow for more space for seats and access to the length of the pool. Mr. Scarlata explained how the space could be used and managed during meets for spectator viewing. It was noted that there would not be any spectator seating but that spectators could stand along the south side deck. Mr. Scarlata stated that they were trying to give as much space on the deck and sides of the pool as possible with the new design. Mr. Nickerson explained how the viewing area needs varied by the size of the meet.

Councilor Kelly asked where the gender neutral changing areas would be located. Mr. Scarlata stated that they had added two new changing room in the lobby area by taking space out of the men's side which was currently underutilized. He noted how the new bathhouse design improved flow and

storage areas. It was noted that the new men's changing area would also have new portioned showers. Councilor Kelly asked why changing the depth of the lap lanes to meet the swim teams request was so difficult and why it was not possible to do in all six lanes. Mr. Scarlata noted that the current pool had been designed with a uniform depth and a 1' in 12' slope which was required by code. The ramp access needed to end in 4' deep water to provide accessibility so at least a portion of the shallow end would need to be 4' and it would take four lane widths to make the transition to the 6' depth that was being requested as they wanted to keep the slopes as gentle as possible. Councilor Kelly stated that she understood that they wanted to keep the corner with the ramp shallow and Mr. Scarlata confirmed that the slopes were required by building code.

Councilor Kelly asked about the areas of the pool facility that would remain open. Mr. Scarlata stated that the spray deck could remain open as it would be separate with a lockable fence between it and the pool. It could then be available when lifeguards were not available for the main pool. Councilor Kelly appreciated the ability to extend the existing pool season in this way.

There were no more public comments at this time. Ms. Weber moved to close the public hearing. Ms. Lunin seconded the motion and all voted in favor.

Ms. Datta thanked the team for keeping the CPC well informed on the project and expressed her appreciation for all the stakeholder engagement and the information on the sustainable features of the project. Mr. Brody thought that it was a great project and that the only element to consider was the best funding mechanism. Commissioner Banks stated that they would work closely with Maureen Lemieux and staff to work through any question on the separate assets and their lifespan in terms of bonding. She thought that they could create a proposal together which considered how to break out any individual materials and how long to bond the project for overall. Mr. Demorizi added that the one detail still to be addressed was the length of the bond recommendation based on the lifespan of the features involved.

Mr. Brody recommended approving the funding now and working out the details of the bond itself later. Ms. Weber asked about the timeframe of the project and Mr. Demorizi stated that they wanted to be ready for construction after the summer season. Ms. Molinsky agreed that some details of the bond could be decided later and noted that not all of the bonding might be done at the same time. Commissioner Banks stated that they were really looking to receive the full project costs at this time and noted that they would be back at the next meeting with the Athletic Fields. Ms. Molinsky noted that the project could not be completely open ended. Mr. Dunker asked how the CPC had reviewed and approved the funding for the Webster Woods project. Mr. Brody stated that the Committee had recommended full bonding but that he was not sure whether they had recommended the length of the bond. Members discussed whether it was possible to approve the funding at this time and have staff work out the details of the bond and whether any of the funding should be cash following the meeting.

It was noted that the timeline for the construction bidding required them to be ready to move forward in mid to late May. The bond package would need to be done soon so that the construction funds would be available at the start of the fiscal year and all agreed that the details of this funding mechanism would need to be worked out with Ms. Lemieux. Commissioner Banks thought that they could begin that discussion next week. Mr. Dunker noted that the project did have ARPA funds as

well that could be used immediately. Mr. Demorizi stated that Mr. Yeo had suggested considering a 20 year bond for all of the Gath Pool funding. Mr. Brody stated that he was comfortable with this but was not sure that they were ready to work out those details. He added that he would be fine with bonding all of the funding for the pool as he believed there would be plenty of chances to use current funding for the Athletic Fields.

Members discussed the status of the project and agreed to consider bonding 100% of the funding for the Gath Pool project. Commissioner Banks agreed with this course of action, noting that this asset had the greatest longevity of their projects as well as the biggest comfort level for bonding. She noted that based on their prior discussions, the Athletic Fields project would have more varied lengths of longevity to work with.

Ms. Datta moved to recommend full funding for the Gath Memorial Pool Proposal in the amount requested of \$5,834,362 through a bonding mechanism to be determined through discussions between City staff, the applicant and Committee. Ms. Lunin seconded the motion which was unanimously approved by voice vote.

Review of Pre-Proposal for the Athletic Fields Improvements Plan Construction Phase

Ms. Molinsky began the discussion by noting that this was not a public hearing. She also thanked those who had sent in letters on the possible installation of synthetic turf at Albemarle Park.

Mr. Demorizi gave a presentation on the status of the project and explained that they had submitted a pre-proposal for the construction phase of the project. This would include work at Albemarle Park, McGrath Park, and the Burr School Fields. He stated that they understood that CPA funding was explicitly prohibited from being used in any location proposed for artificial turf. He noted that all types of fields were important and that a large part of this project was to improve the City's multipurpose fields and develop creative approaches to providing more multi-purpose field offerings throughout the City. He pointed out that there had been a lot of emphasis placed on the athletic fields in recent years and that a new organization, the Newton Athletic Field Foundation, had also been established. In response, the Department had developed a five year capital plan that considered the quality, quantity, and maintenance improvements needed for the City's fields. He reviewed the elements of the goals that they had established and noted that their proposed capital projects needed to address accessibility, asset management, sustainability and no mow areas. He reviewed the list of concerns and goals that their Department had been using for the last year to complete these reviews.

Beginning with Albemarle Park, Mr. Demorizi reviewed the existing conditions and noted that there was a lot of overlap between the existing baseball diamonds. Their plan for this site had looked at the full site and considered the changes that would be made by the new pool. The work would include replacing 50 year old lights and moving and reconfiguring the existing fields. Mr. Demorizi reviewed whether the lights would be located and noted that they were working with the Newton Little League on the proposed field lights for Murphy Field. The project would request \$4,221, 304 in CPA funding for this location which did not include either the lights at Murphy Field or any of the synthetic field expenses. The total anticipated cost for this site was \$5.9 million and they were working on a breakdown of the project units and their lifespan for the next meeting.

The Burr School Fields were noted to have a large grass area but to be of low quality with uneven land and no irrigation. Mr. Demorizi stated that only a small area was usable now but that by leveling the field they could create new full size fields and showed possible configurations for the new site. He stated that the project would also include a perimeter path that would be fully accessible as well as a no mow area for pollinators. The total cost for this site would be \$1,273,512.50 from CPA funds. Mr. Demorizi stated that they were considering whether existing fill at another City site could be used here which would save on costs and believed that they had 6,000 cubic feet of the 10,000 cubic feet of dirt needed for the site.

Mr. Demorizi then reviewed the existing configuration of McGrath Park and explained how the fields lacked safety zones. They were proposing to reconfigure the site for better and safer field placement and new perimeter paths. They were also working with the Lacrosse teams on a possible practice wall at this site. The anticipated CPA funding request for this site was \$632,644.90 which included light changes, clearing of the surrounding land, and reconfiguring fencing. Mr. Demorizi noted that they would also be using CDBG funding for the perimeter path and reviewed the life cycle of the project features.

Lastly, Mr. Demorizi explained that they would also need some additional funding to complete design work on the three sites. This amounted to \$478,862.50 in additional CPA funding requested. Mr. Demorizi explained how the artificial turf field would be considered as a completely separate project from the current proposal and was not included in the requested CPA funds. It was noted that the full CPA fund request was just over \$8.3 million. Mr. Demorizi reviewed the timeline for the project and explained that they were working to confirm the schedule. He stated that they planned to be back before the Committee in April with a full application and noted the next steps involved in continuing this project at the remaining sites.

Councilor Downs asked to confirm that synthetic turf could not be funded from CPA funds. Ms. Molinsky stated yes, that the state CPA legislation prohibited that use. Councilor Downs then asked how committed the Parks and Recreation Department was to having a synthetic turf field at this site. Commissioner Banks answered that they were not looking to put any of the elements of the CPA funding request into the potential synthetic turf area and that they planned to keep that work separate from the rest of the project. She stated that they would be in front of the City Council to discuss the fields and that they had come Newton North High School's interest in expanding from one to two synthetic turf fields. She stated that she had heard concerns from residents and had held public meetings and spoken with scientists about the materials. She noted that a lot of the concerns were with crumb rubber fill which the City was moving away from in its replacement work. Instead, the City was using TPE which was a different product from the existing fields and was expected to be safer. Commissioner Banks noted that many people were worried about PFAS forever chemicals and that some artificial turf was exposed to these materials during manufacturing. She explained that the City was committed to finding a manufacturer who will limit this exposure and was also prepared to send any proposed material out for independent testing. Commissioner Banks stated that they had already been asked to look into these chemical issues and Mr. Demorizi added that the City was about a week away having lab results as required by the Order of Conditions for the Newton South High School project.

Ms. Molinsky noted again that the CPA funding legislation prohibited the use of any CPA funding for the purchase of synthetic turf and explained how this has been interpreted in the past. Mr. Brody asked if the synthetic turf field could be separated out from the rest of the Albemarle Park project and done at a later time. Mr. Demorizi noted that this element would likely be done at a later date as they would need space for material storage for the Gath Pool project, which also required site work and groundwater permitting with the Conservation Commission. However, they did want to keep these projects moving forward and needed to have the money in place as soon as possible to move forward with construction. If the City decided against synthetic turf, then he anticipated that they would be coming back to the CPC for funding for the grass field.

Commissioner Banks stated that they were working on these projects in parallel and also needed to go to the City Council for the synthetic turf field funding. Mr. Brody noted that Councilor Albright had requested a study on the merits of artificial vs. grass fields. Commissioner Banks stated that they would be having a parallel discussion with the City Council on the turf. She went on to note that they could not schedule using the existing lights at Albemarle Park because they were so out of date and that the elements of this project were intertwined and that they did not want to stop moving the elements forward if possible. Mr. Brody stated that he would be more comfortable if all of the elements of the Albemarle Park project that were not scheduled for immediate construction were removed from the proposal materials. He asked that the applicants separate out these elements to make the project easier to approve. Commissioner Banks appreciated this recommendation and thought that they could focus on what they wanted to do now and their confidence with the new design.

Mr. Armstrong asked where their cost estimates for the project were coming from. Mr. Demorizi stated that they were finalizing the design and working with the engineer's cost estimates. It was noted that these estimates had come from the project consultants, not the Department. Mr. Armstrong asked if the applicants had high confidence in the proposed maintenance budget for the City. Mr. Demorizi stated that all three sites were considered to be premier field sites and how they had been working for the last three years to develop a framework for their continued maintenance including field fees. He also noted that they had worked on their maintenance budget and fee structure before developing the renovation plans. Ms. Datta asked the applicants to address any sustainable design elements in the project in the same manner that they had for Gath pool.

Councilor Wright noted that Councilor Albright had docketed the study on the fields and that the funding for the synthetic turf still needed to complete the City Council review process. She also asked about a potential state bill to ban synthetic turf fields. Councilor Malakie cautioned against installing more synthetic turf fields as she felt it committed the City to the budget and potential liability of dealing with their future recycling. She was concerned with chemicals leaching into the ground and thought that the City should instead use CPA funds to acquire more grass fields.

Ms. Molinsky reiterated that no CPA funding would be used for the design, preparation, or construction of synthetic fields. She also stated that she would be more comfortable with a full proposal that did not include the synthetic field elements. Ms. Lunin noted that there was already a synthetic field across the street at Fessenden School. She stated that the Conservation Commission had required testing when that field was installed and that none of the fill was found in the water

supply. She did think these changes warranted consideration for both the environment and the athletes, however, and noted that there were more infections and heat incidents with synthetic fields. She thought that grass fields were preferred but noted that synthetic turf fields were less weather dependent. As a Conservation Commission member, she had never seen a definitive study against synthetic turf but agreed that there were many indications of concern. Commissioner Banks stated that she loved grass fields and noted that the City had many of these too. She noted that the type of synthetic field under consideration had better temperature control allowed for less water migration.

Ms. Weber commented that there has clearly been a lot of thought put into these issues. She thought that the Committee's job was now to consider how to support this project and asked if there were comments on the distribution of funds. Ms. Molinsky agreed and stated that she would be more comfortable with the project if they had a better sense from the CFO on what elements of the project could and could not be bonded. Mr. Brody stated that he had thought of two options for the project. He would like to see the proposal broken into four components – McGrath, Burr, Albemarle work for this fiscal year, and Albemarle work in the future. Commissioner Banks stated that her concern with breaking down the project like this is that they would want to manage the work all together. She noted that Phase I of the construction work included everything in the current funding request. Ms. Molinsky clarified that the City needed to have the funding committed before going out to bid. Mr. Demorizi answered yes and noted that doing all the work at once would save on overhead. Ms. Weber and Ms. Datta agreed that the details in the presentation were very helpful. Mr. Brody agreed and asked for a further breakdown of the project costs. Ms. Weber moved to invite the applicants to submit a full proposal for the Athletic Fields Construction Project at their earliest convenience. Ms. Datta seconded the motion and all voted in favor by voice vote.

Review of Pre-Proposal for the Warren House Preservation and Rehabilitation Project

Ms. Weber left the meeting at this time as she is a member of the funding applicant organization.

Newton Community Development Foundation (NCDF) Executive Director Jeanne Strickland was present along with one of their board members, David Levy, who specializes in affordable housing and real estate. Ms. Strickland explained that they were considering a future full proposal for funding to complete cast stone, masonry, and window repair and replacement work at the Warren House, a former junior high school building. In the 1990s, NCDF had been approached by the City to purchase the vacant building and convert it into housing which resulted in a 59 unit project that includes 21 affordable units available at 50% AMI. The affordability of six of these units is now set to expire and they had been working with Gale Associates to address the building envelope needs. Ms. Strickland noted that CPA funding had been awarded to Phase I of their project in the early 2000s to complete masonry and roof repairs and that they were now seeking to do Phase II of the necessary work through refinancing the building. She noted that the building was surrounded by the City's McGrath playing fields and was well maintained with relatively new systems, new elevators installed in 2021, and new kitchens in many of the units. She saw the Warren House as a valuable resource and appreciated the CPC's willingness to discuss future funding options.

Ms. Molinsky noted that the request for CPA funding was for \$2.1 million. It was also noted that the project was requesting funding from the Newton Housing Trust and HOME funds. Director of Housing and Community Development Amanda Berman stated that Ms. Strickland had been working with the City

for the last few months to work out the details of the project's refinancing. She noted that NCDF was a critical partner to the City and provided lower than market value housing as well as supportive services. Ms. Berman stated that the City had a vested interest in seeing this property well maintained and restored. Ms. Molinsky asked what the units which were not restricted to 50% AMI were rented for. Ms. Strickland answered that they were market rate units but were rented at rates that were considerably lower than the newer units at Trio and other buildings in Newton. Ms. Datta asked if all 21 of the affordable units were at 50% AMI. Ms. Strickland answered yes, that this rate also extended to the 6 units which were expiring.

Ms. Molinsky noted that this was an application for historic resource funding and that the CPC liked to see projects that furthered sustainability. She asked the applicants to highlight the sustainable elements in their proposed work. It was noted that similar work was done in 2018 at the NCDF's Weeks House. Ms. Datta agreed that it would be good to know more about sustainability, project management, and how they were leveraging their funding. She noted that there was typically more leveraging in affordable housing projects and asked why they were not reaching out to additional funding sources. Mr. Levy stated that they were avoiding tax credits as they wanted to minimize the costs in straight recapitalizing. Their plan was to pay off the second mortgage and get a new first mortgage and complete the necessary work using cash from sponsors and the CPC. Ms. Datta wondered if there might not be other funding available from using historic tax credits or sustainability elements. Mr. Levy did not believe those were available and thought that that the performative objective of the project was sufficient. He also noted that Phase II of this project had used \$300,000 in state tax credits. Ms. Strickland stated that they were working with Gale Associates to develop the scope and details of the project and stated that each project that they had done with this group had been under budget and on time. Ms. Lunin moved to invite NCDF to submit a full proposal for funding of restoration work at the Warren House complex at the applicant's convenience. Mr. Brody seconded the motion which passed by unanimous vote.

Status Report and Review of CPA Program Information Session

Ms. Kritzer stated that due to an unforeseen absence, she was behind in outreach and would like to reschedule the information session to later in the spring. Members agreed to look for a new date later in April or May.

Review of Existing and Potential Future Projects

Members had a brief review of current and potential future projects at this time.

Review of Current Finances

Members reviewed the most recent Finances At A Glance update at this time.

Approval of February 14 Minutes

No minutes were available at this time. This item was postponed to the following meeting.

Ms. Datta moved to adjourn. Ms. Lunin seconded the motion which passed by unanimous voice vote. The meeting was adjourned at 9:35 P.M.