

March 25, 2013

Alice Ingerson  
Community Preservation Program Manager  
City of Newton Planning & Development Department  
1000 Commonwealth Avenue  
Newton, MA 02459

RE: Newton Cultural Alliance, Nathaniel Topliff Allen Homestead

Dear Alice:

On behalf of the board of the Newton Cultural Alliance, please find enclosed the Newton Cultural Alliance's Pre-Proposal for the Nathaniel Allen Homestead project. Included with this application are the required attachments for Historic Resources Proposals and Addendae to them, as well as the required Application attachments of photos and a map. Please let me know if there is additional information that would be helpful at this time.

Very truly yours,

*Adrienne Hartzell*

Adrienne Hartzell  
Clerk, Newton Cultural Alliance

*Laurel Farnsworth*

Laurel Farnsworth  
Project Manager



Setti D. Warren  
Mayor

**Newton, Massachusetts Community Preservation Program  
FUNDING REQUEST**

**PRE-PROPOSAL**

**PROPOSAL**

Form last revised January 2013.

*(For staff use)  
date rec'd:*

25 March  
2013

For full instructions, see [www.newtonma.gov/cpa](http://www.newtonma.gov/cpa) or contact:

Community Preservation Program Manager,  
City of Newton Planning & Development Department, 1000 Commonwealth Ave., Newton, MA 02459  
[aingerson@newtonma.gov](mailto:aingerson@newtonma.gov) 617.796.1144

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

<b>Project TITLE</b>	<b>Nathaniel Allen Homestead</b>			
<b>Project LOCATION</b>	Full street address (with zip code), or other precise location. 35 Webster St. , West Newton, MA 02465			
<b>Project CONTACTS</b>	Name & title or organization	Email	Phone	Mailing address
<b>Project Manager</b>	Laurel Farnsworth, Board member Newton Cultural Alliance, Construction Owner's Representative	<a href="mailto:laurel@downeyfarnsworth.com">laurel@downeyfarnsworth.com</a>	617-244-2209 (h) 617-429-7297 (c)	73 Perkins St., West Newton, MA 02465
<b>Other Contacts</b>	Adrienne Hartzell, Clerk Newton Cultural Alliance	<a href="mailto:Adrienne@newtonculture.org">Adrienne@newtonculture.org</a> <a href="mailto:Adrienne@newphil.org">Adrienne@newphil.org</a>	617-332-4300 857-636-0199	1301 Centre St. Newton, MA 02459
<b>Project FUNDING</b>	<b>CPA funds requested:</b> \$1.5 million	<b>Other funds to be used:</b> 1) State grants, 2) Private foundation grants, 3) Village Bank, loan guaranteed by Mass Dev. Agency, 4) individual donations		<b>Total project cost:</b> \$3.3 million
<b>Project SUMMARY</b>	Explain the project's community benefits, including the basis for CPA eligibility, and why CPA funds are needed. You may provide more information in attachments, but your SUMMARY MUST FIT IN THE SPACE BELOW.			
<p><b>The Nathaniel Allen Homestead</b> is a major Newton historic site. It is on the National Register of Historic Places and a Newton Landmark. The Newton Cultural Alliance (NCA) was able to save it from becoming luxury condos, buying it with a generous \$250K gift on very short notice in November 2012. Since then NCA has been marshaling its efforts to develop a project that will benefit the city, region and nation as a destination for cultural tourism. Allen was a truly noted innovative educator whose story resonates across the country even today. The NCA has a plan that will not only bring benefit to the community by rehabilitating this great historic site but also by opening to the community this building that has fallen on hard times and been an eyesore for years. It is currently in poor but not unsalvageable condition with no community benefit. The NCA business plan that includes NCA member, Suzuki School of Newton as anchor tenant, whose rent will cover ongoing expenses. At the same time the first floor parlors and grounds will be accessible to the public and other arts/cultural organizations. This project is CPA-eligible as an important historic resource in Newton. The repairs necessary are significant and essential to making the facility functional. To develop the plan NCA has engaged an architect, attorney, &amp; parking/engineering consultants to make sure requirements are met. <b>CPA funding is vital</b> to this project. Not only is this site one of the three great historically relevant homes in the city and currently in deplorable condition but the project is of such a magnitude that individual gifts and small grants are not likely to provide adequate funding. We have engaged fundraising staff &amp; with proper city approvals will begin a campaign. We recently submitted a major grant proposal to the Mass Cultural Council. We will meet an exacting schedule of additional grant writing, but the funds needed to fully develop this site go beyond what our capacity without CPA assistance. <b>This project is incredibly exciting</b>, and an amazing opportunity to save an irreplaceable piece of Newton's history. NCA will invest in making public community space and create historic and educational displays and programming to perpetuate Allen's legacy. We hope that crucial CPA funding will support this project to benefit the community.</p>				

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<b>USE of CPA FUNDS</b>	<b>HISTORIC RESOURCES</b>	<b>OPEN SPACE</b>	<b>or</b>	<b>RECREATION LAND</b>	<b>COMMUNITY HOUSING</b>																
<b>Check all that apply.</b>	acquire				Contact staff for separate form.																
	create	not allowed																			
	preserve																				
	rehabilitate/restore	X	Consult staff.	Consult staff.																	
<b>COMMUNITY NEEDS</b>	<p>Cite 1 or more recognized community needs this project will address from at least 2 community plans listed on the <i>Guidelines &amp; Forms</i> page of <a href="http://www.newtonma.gov/cpa">www.newtonma.gov/cpa</a>, (give plan title, year, pages &amp; a brief quote).</p> <p>The Allen House is listed in the Newton Comprehensive Plan 2007, Section 9– “Planning for &amp; with History,” pp. 9-1 to 9-18. It is #5 on the Historic Properties Map. In accordance with the goals of the <i>Comprehensive Plan of doing more with history</i>, (p. 9-6) our project will follow Newton’s growing historic trend “...seeing history everywhere. By rehabilitating and integrating historic resources into everyday life,” the Newton Cultural Alliance is planning for the property to be a cultural/educational facility. This harks back to its previous use as the Misses Allen School and Nathaniel Allen’s use as dormitory and meeting/recreational space for his students at the Model School in present-day West Newton Square. The property will not be a house or history museum such as the Jackson Homestead or Durant-Kenrick House though we intend to install a permanent exhibit on the life and achievements of Nathaniel Allen and his family. It will be a working building with music students, a preschool, community events from recitals to lectures/meetings and available for rent for small parties and weddings. However, true to a “special place for reasons of the heart”(p. 9-7) the Allen Homestead’s distinct architecture and history define the character of the neighborhood.</p> <p>The Allen House is also listed in the Appendix of the Heritage Landscape Report (p.52, rev.2010) in the section titled Residential/Neighborhood. While many significant old trees remain, many are also are in very poor condition. The Newton Tree warden has visited the property but we do not yet have a full report. Our landscape consultant will be working with the City to make a full preservation plan in accordance with good tree care practice. Our attorney, parking and engineering consultants have tried to balance the preservation of as much of the landscape as possible with the parking requirements of the zoning code for an educational and cultural facility. We will be appearing before the Historic Commission on March 28 and presenting our proposal to them for consideration.</p> <p>We have hired architect Donald Lang, an expert in historic preservation, to prepare our architectural concept plans in accordance with all the Newton Historic Preservation Design Guidelines. We are not yet at the stage of working construction drawings as we are still waiting for Historic Commission, zoning and handicapped accessibility approvals. It is our intention to comply with all these codes and restore and repair the exterior with only minor changes to comply with accessibility and zoning requirements.</p>																				
<b>COMMUNITY CONTACTS</b>	<p>List 3 Newton residents or organizations that can comment on the project and its manager’s qualifications. No more than 1 of these contacts should be a Board member, supervisor, employee or current work colleague of the project manager. Formal letters of support may also be attached but are not required.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Name &amp; title or organization</th> <th style="width: 20%;">Email</th> <th style="width: 20%;">Phone</th> <th style="width: 30%;">Mailing address</th> </tr> </thead> <tbody> <tr> <td>Karen Haywood, neighbor</td> <td><a href="mailto:ktapper41@hotmail.com">ktapper41@hotmail.com</a></td> <td>617-332-2888</td> <td>69 Walker St, Newton 02460</td> </tr> <tr> <td>Erin Splaine, Minister, First Unitarian Society in Newton</td> <td><a href="mailto:minister@fusun.org">minister@fusun.org</a></td> <td>617-527-3203</td> <td>First Unitarian Society Newton, 1326 Washington St., Newton 02465</td> </tr> <tr> <td>Mr. Gorham Brigham</td> <td>Fgb3@comcast.net</td> <td>617-965-2482</td> <td>401 Cherry St, Newton 02465</td> </tr> </tbody> </table>					Name & title or organization	Email	Phone	Mailing address	Karen Haywood, neighbor	<a href="mailto:ktapper41@hotmail.com">ktapper41@hotmail.com</a>	617-332-2888	69 Walker St, Newton 02460	Erin Splaine, Minister, First Unitarian Society in Newton	<a href="mailto:minister@fusun.org">minister@fusun.org</a>	617-527-3203	First Unitarian Society Newton, 1326 Washington St., Newton 02465	Mr. Gorham Brigham	Fgb3@comcast.net	617-965-2482	401 Cherry St, Newton 02465
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<b>NON-CPA FUNDING</b>	Source of funds	Amount requested	Date of funding decision (confirmed or expected)																		
Initial gift for the purchase of the property by private foundation		\$250,000	Received October, 2012																		
Mass Cultural Council facilities planning grant		\$ 27,000	Rec’ Feb. 2013 (awarded Dec. 2010)																		
Mass Cultural Council capital grant		\$250,000	summer 2013																		
Mabel Louise Riley Foundation		\$100,000	fall 2013																		

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

**Especially for pre-proposals, use only as many lines as needed to give a broad overview** of your project.

Full proposals must also include a full, detailed budget in addition to this page.

Project TITLE	<b>Nathaniel Allen Homestead</b>		
Project BUDGET	<b>USES of Funds</b> (major expense categories)		<b>SOURCES of Funds</b> (CPA & others)
<b>CAPITAL/DEVELOPMENT COSTS</b>			
Construction, including restoration/ rehabilitation	\$2,445,000	CPA	\$1,500,000
General conditions	\$25,0000	MA Cultural Council CFF grants	\$250,000
20% contingency	\$489,000	MA Historic Commission grant	\$100,000
Zoning/legal fees	\$30,000	Riley Foundation	\$100,000
Architect	\$70,000	Individual & Corporate Gifts	\$600,000
Engineer	\$8,000	Village Bank/MA Development Loan	\$750,000
Traffic/parking	\$8,000		
<b>TOTAL</b>	<b>\$3,300,000</b>	<b>TOTAL</b>	<b>\$3,300,000</b>
<b>ANNUAL OPERATIONS &amp; MAINTENANCE</b> (cannot use CPA funds)			
Maintenance contracts (snow, cleaning, etc.)	\$30000	Suzuki School of Newton Lease	\$80000
Mortgage	\$60000	Other groups rentals	\$25000
Other maintenance (pest control, minor repair,	\$1500	Fundraising	\$31000
Utilities (gas, electric, water)	\$32000		
Insurance, permits	\$12500		
<b>TOTAL</b>	<b>\$136000</b>	<b>TOTAL</b>	<b>\$136000</b>
Project TIMELINE	Phase or Task	Notes (required fundraising, permits, bidding, etc.)	Season & Year
	Historic commission, zoning approvals	Newton Historic commission 3/28/13 Zoning attorney petition submitted.	Spring 2013
	Selective Demolition	Building permit for engineering studies and utility line placement	Spring 2013
	City of Newton Engineering-review of utilities; Mass. Access board review, working drawings	3 processes in parallel	Summer 2013
	Contractor bidding	3 competitive bids, selection	Fall 2013
	Interior and Exterior Demolition	Demolition as required; structural bracing For new foundation	Winter/Spring 2014
	New Utilities and Foundation		Spring 2014
	All exterior repairs and begin interiors		Spring 2014
	Interior Repairs and elevator shaft		Summer 2014
	Elevator installation and interior finishes		Winter 2015
	Exterior paving, Landscaping, grounds		Spring 2015
	Final permitting; Preschool DEEC licensing	Inspections, permits	Summer 2015

Project TITLE		Nathaniel Allen Homestead	
Required or Optional?	Check if included	Attachment Title & Description	
REQUIRED for all proposals	X	<b>PHOTOS</b>	of existing site or resource conditions (2-3 photos may be enough)
	X	<b>MAP</b>	of site in relation to nearest major roads (omit if project has no site)
		<b>PROJECT FINANCES</b> printed and as computer spreadsheets, with both uses & sources of funds	
		<b>development pro forma/capital budget:</b> 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)	
		<b>10-year annual operating &amp; maintenance budget</b> (CPA funds may not be used here)	
		<b>non-CPA funding:</b> commitment letters, letters of inquiry to other funders, fundraising plans, etc., including both cash and est. dollar value of in-kind contributions	
		<b>purchasing of goods &amp; services:</b> short email or letter summarizing sponsor’s understanding of applicable statutes (MGL ch. 30, 30B and/or 149) and City policies	
		<b>SPONSOR FINANCES &amp; QUALIFICATIONS</b>	
		<b>for sponsoring department or organization, most recent annual operating budget</b> (revenue & expenses) & <b>financial statement</b> (assets & liabilities); each must include both public (City) and private resources (“friends” organizations, fundraising, etc.)	
		<b>for project manager: relevant training &amp; track record</b> of managing similar projects	
OPTIONAL for all proposals		<b>LETTERS of SUPPORT</b>	from Newton residents, organizations, or businesses
REQUIRED for all proposals that involve City govt., including real estate acquisitions		<b>CAPITAL IMPROVEMENT PLAN</b>	current listing/ranking & factors for this project
		<b>COVER LETTER</b>	from head of City department, board or commission confirming: current custody, or willingness to accept custody, of the resource and commitment of staff time for project management
REQUIRED for all historic resources proposals	X	<b>HISTORIC SIGNIFICANCE</b>	<b>see separate instructions for 3 required attachments</b> analyzing significance and showing how project meets national preservation standards
REQUIRED for all proposals involving real estate acquisition, construction or improvements  Consult staff to confirm requirements for each project.		<b>SITE CONTROL, VALUE &amp; DEED RESTRICTIONS</b>	
		<b>legally binding option, purchase &amp; sale agreement or deed</b>	
		<b>appraisal</b> by an independent, certified real estate appraiser (the CPC may also commission its own, separate appraisal)	
		<b>owner’s agreement to a permanent deed restriction</b> (for affordability, historic preservation or land conservation)	
		<b>ZONING &amp; PERMITTING</b>	
		short email confirmation of review by the <b>Development Review Team (DRT)</b>	
		<b>brief property history:</b> at least the last 30 years of ownership & use	
		<b>environmental mitigation plans</b> (incl. lead paint, asbestos, underground tanks)	
		<b>zoning relief and permits required</b> (incl. parking waivers, demolition or building permits, comprehensive permit or special permit)	
		<b>other approvals required</b> (Newton Conservation Commission, Newton Historical Commission, Newton Commission on Disabilities, Massachusetts Historical Commission, Massachusetts Architectural Access Board, etc.)	
		<b>DESIGN &amp; CONSTRUCTION</b>	
		<b>professional design &amp; cost estimates:</b> include site plan, floor plans & elevations	
		<b>materials &amp; finishes;</b> highlight “green” or sustainable features & materials	



**Newton Community Preservation Program Grant Pre-Proposal  
Newton Cultural Alliance – Nathaniel Allen Homestead  
Spring 2013**

**Application Page 4**

**Attachment - PHOTOS**

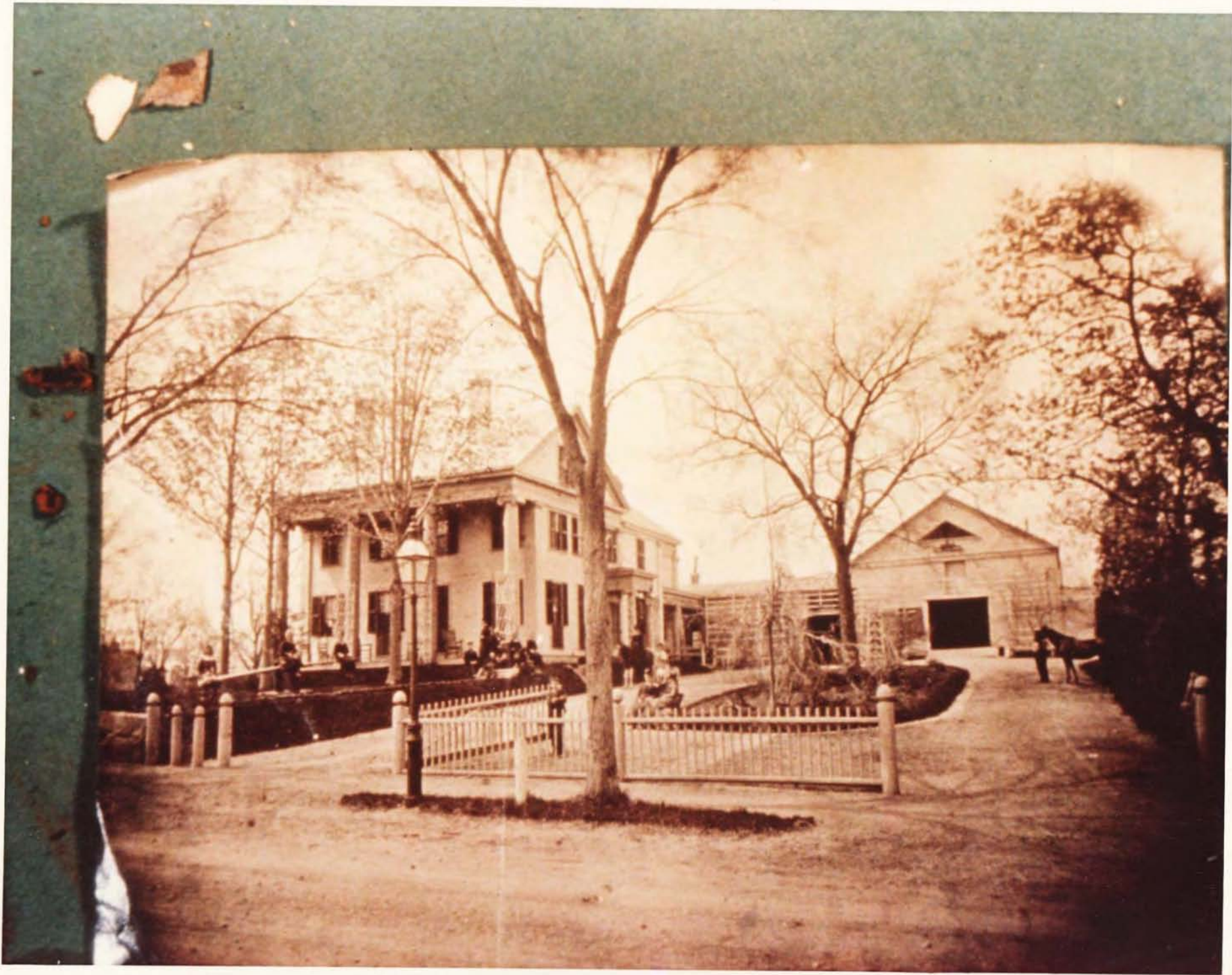












**Newton Community Preservation Program Grant Pre-Proposal  
Newton Cultural Alliance – Nathaniel Allen Homestead  
Spring 2013**

**Application Page 4**

**Attachment - MAP**





Address **35 Webster St**  
**Newton, MA 02465**

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Text the word "GMAPS" to 466453

