



Setti D. Warren
Mayor

Newton, Massachusetts Community Preservation Program FUNDING REQUEST

PRE-PROPOSAL

PROPOSAL

(For staff use)
date rec'd:
4:20 pm, 14
November 2013

Form last updated September 2013.

For full instructions, see 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 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.

Project TITLE	A Strategic Plan for Newton's Archives and Records			
Project LOCATION	Full street address (with zip code), or other precise location. 1000 Commonwealth Avenue, Newton Centre, MA 0-2159			
Project CONTACTS	Name & title or organization	Email	Phone	Mailing address
Project Manager	David Olson City Clerk	dolson@newtonma.gov	617-796-1203	1000 Commonwealth Ave., Newton Centre, MA 02459
Other Contacts	Nancy Kougeas City Archivist	nkougeas@minlib.net	617-796-1399	330 Homer Street Newton, MA 02159
Project FUNDING	CPA funds requested: \$20,000	Other funds to be used:	Total project cost: \$20,000	
Project SUMMARY	Summarize the project's scope of work (how CPA funds will be used), and why you believe it is eligible for CPA funds. You may provide more information in attachments, but your SUMMARY MUST FIT IN THE SPACE BELOW.			
<p>Archives and records are currently held at locations throughout the City. Major collections are held by the Fire, Police & School departments; the Newton Free Library; the Jackson Homestead; the City Archives; and in various storage rooms and vaults in City Hall. With few exceptions, historical materials and records crucial to understanding the past or necessary for functioning are being stored in areas that are not climate controlled and do not have appropriate security and fire alarm or suppression systems. These materials are stored on many media including paper, digital, audio tapes and CDs and in formats that range from standard size paper documents to oversize books and maps. A strategic plan is needed to determine the needs of these departments and the options available to meet these needs.</p> <p>A consulting archivist will be hired to meet with representatives of the archives and records repositories named above and with a representative of the Building Department. The consultants will work with the core group of department heads that hold significant archival material, and meet with smaller departments with archival material to gather information in order to develop a plan for the care and housing of archival material across the city. The consultant will assess possible locations to use as archival storage area/s, and meet with the City's Archivist to obtain an update on progress that has been made since the <i>The City of Newton: A Survey and Inventory of its Historical Records</i> was completed.</p>				

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Project TITLE		A Strategic Plan for Newton's Archives and Records				
USE of CPA FUNDS		HISTORIC RESOURCES	OPEN SPACE	or	RECREATION LAND	COMMUNITY HOUSING
Check all that apply.	acquire					Contact staff for separate form.
	create	not allowed				
	preserve	X				
	rehabilitate/restore		Consult staff.			
COMMUNITY NEEDS	<p>From at least 2 community-wide plans linked to <i>Guidelines & Forms</i> from www.newtonma.gov/cpa, provide the plan title, year, page number and a brief quote showing how this project meets needs already recognized in these plans. You may also list other community benefits not mentioned in any plan.</p> <p>As noted in <i>The City of Newton: A Survey and Inventory of its Historical Records</i> [December 2011, p. 10] "The City of Newton needs to begin planning to create climate controlled, secure storage space for its archives and departmental records. The Archives in the Newton Free Library is full." The report goes on to detail that there are "currently more historical records held by City departments than are in the City Archives...given the current conditions, it is only a matter of time before there is a devastating loss—not only of historical records but also the records that departments need to function."</p> <p>The Comprehensive Plan adopted for the City of Newton in 2007 encourages the City to plan for and with history [Page 9-2]; the historical materials stored throughout the City are vitally important in achieving this goal. Archives allow us to demonstrate the significance of everything else and are necessary when seeking funding outside of the municipal government.</p>					
COMMUNITY CONTACTS	<p>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. Consult staff on the types of community contacts required for your specific proposal.</p>					
Name & title or organization		Email		Phone	Mailing address	
Susan Abele Newton Historian		susan.abele@gmail.com		617-969-4368	23 Russell Court Newton, MA 02460	
NON-CPA FUNDING	Source of funds			Amount requested	Date of funding decision (confirmed or expected)	

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 full, detailed budgets in addition to this page.

Project TITLE	A Strategic Plan for Newton's Archives and Records		
Project BUDGET	USES of Funds (major expense categories)	SOURCES of Funds (CPA & others)	
CAPITAL/DEVELOPMENT COSTS			
Consultant	\$20 000	Community Preservation Act Funds	\$ 20,000
Archivist @ 20 hours	\$ 700	City FY14 Operating Budget	\$ 700
5 Member Planning Team @ 8 hours each	\$ 2,360	City FY14 Operating Budget	\$ 2,360
9 Staff responsible for departmental archives @ 2 hours each	\$ 720	City FY14 Operating Budget	\$ 720
	\$ 000		\$ 000
	\$ 000		\$ 000
	\$ 000		\$ 000
	\$ 000		\$ 000
TOTAL	\$ 23,780	TOTAL	\$ 23,780
ANNUAL OPERATIONS & MAINTENANCE (cannot use CPA funds)			
	\$ 000		\$ 000
	\$ 000		\$ 000
TOTAL	\$ 000	TOTAL	\$ 000
Project TIMELINE	Phase or Task	Notes (required fundraising, permits, bidding, etc.)	Season & Year
	Request for Proposals		March 2014
	Hire Consultant; schedule meetings with Key Department Personnel and visits to departments		April 2014
	Meetings with Planning Team members and department personnel responsible for archives		May 2014
	Review of Final Report		June 2014

Attachments NOT required for this proposal have been ~~greyed-out~~ below by CPC staff.

Project TITLE	City Archives Strategic Plan			Corrected by CPC staff to match 14 November 2013 submission.
Check off submitted attachments here ↓		Attachment Title & Description		
REQUIRED for all proposals	✓	PHOTOS	of existing site or resource conditions (2-3 photos may be enough)	
		MAP	of site in relation to nearest major roads (omit if project has no site)	
	PROJECT FINANCES printed and as computer spreadsheets, with both uses & sources of funds			
	✓	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)		
	10-year annual operating & maintenance budget (CPA funds may not be used here)			
	only City staff time for proj mgmt	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		
	purchasing of goods & services: short email or letter summarizing sponsor's understanding of applicable statutes (MGL ch. 30, 30B and/or 149) and City policies			
	SPONSOR FINANCES & QUALIFICATIONS			
not yet submitted	for sponsoring department or 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.)			
not yet submitted	for project manager: relevant training & track record of managing similar projects			
OPTIONAL for all proposals	solicited but not yet submitted	LETTERS of SUPPORT	from Newton residents, organizations, or businesses	
REQUIRED for all proposals that involve City govt., including real estate acquisitions	not yet submitted	CAPITAL IMPROVEMENT PLAN	current listing/ranking & factors for this project	
	not yet submitted	COVER LETTER	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	HISTORIC SIGNIFICANCE		see separate instructions for 3 required attachments 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.	SITE CONTROL, VALUE & DEED RESTRICTIONS			
	legally binding option, purchase & sale agreement or deed			
	appraisal by an independent, certified real estate appraiser (the CPC may also commission its own, separate appraisal)			
	owner's agreement to a permanent deed restriction (for affordability, historic preservation or land conservation)			
	ZONING & PERMITTING			
	short email confirmation of review by the Development Review Team (DRT)			
	brief property history: at least the last 30 years of ownership & use			
	environmental mitigation plans (incl. lead paint, asbestos, underground tanks)			
	zoning relief and permits required (incl. parking waivers, demolition or building permits, comprehensive permit or special permit)			
	other approvals required (Newton Conservation Commission, Newton Historical Commission, Newton Commission on Disabilities, Massachusetts Historical Commission, Massachusetts Architectural Access Board, etc.)			
	DESIGN & CONSTRUCTION			
	professional design & cost estimates: include site plan, floor plans & elevations			
materials & finishes; highlight "green" or sustainable features & materials				

A Strategic Plan for Newton's Archives and Records

Storage areas currently in use:

Top: Building Plans stored in the basement of City Hall;

Bottom: records stored in the Executive Office Vault, City Hall



Records Storage, Public Works, Elliot Street

