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**Community Preservation Committee
FUNDING RECOMMENDATION for
Museum Archives, Accessibility & Fire Suppression**

date: 23 July 2013
from: Community Preservation Committee
to: The Honorable Board of Aldermen

PROJECT GOALS & ELIGIBILITY

This project will expand storage and research space for the Jackson Homestead's archival collections (printed materials, manuscripts and photographs) while also providing current-standard handicap accessibility and fire suppression to protect the museum's historic building, its collections and its visitors. The funds recommended will complete work begun with two prior appropriations that already recognized the project's CPA eligibility based on the building's listing on the National Register of Historic Places and Newton Historical Commission recognition of the archival collection's local historic significance.

RECOMMENDED FUNDING

On 11 July 2013 by a vote of 6-0 (current members Joel Feinberg and Don Fishman absent, Newton Historical Commission position vacant), the Community Preservation Committee recommended appropriating \$641,000 from the Community Preservation Fund's historic resources fund balance to the Public Buildings Department for the purposes described in the attached proposal and the summary budget below. Although most categories in this budget are fungible, the CPC specifically voted to limit CPA funds for FFE to a maximum of \$10,448:

Museum Archives, Accessibility & Fire Suppression					
USES of FUNDS	Totals	SOURCES of FUNDS			
		CPA	CDBG	OTHER (private donations, other grants)	NOTES
DESIGN for	\$155,632				
Archives	\$65,316	\$65,316			
Accessibility	\$65,316	\$65,316			
Fire Suppression	\$25,000	\$25,000			
CONSTRUCTION + contingency for	\$612,765				
Archives	\$225,996	\$225,996			
Accessibility	\$256,769	\$216,769	\$40,000		<i>committed</i>
Fire Suppression	\$130,000	\$130,000			
OTHER (all for Archives)	\$77,500			\$24,000	<i>committed</i>
collections storage & moving	\$27,500	\$3,500			
FFE - furniture, fixtures & equipment	\$50,000	\$10,448		\$39,552	<i>to be raised</i>
PROJECT TOTAL	\$845,897	\$742,345	\$40,000	\$63,552	
Previously appropriated CPA funds		(\$101,345)			
Recommended additional CPA funds:		\$641,000			

(continued on page 2)

website www.newtonma.gov/cpa
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SPECIAL ISSUES CONSIDERED BY THE CPC

Project Management The CPC was concerned about the prolonged design and approval process for this project, which has undoubtedly increased its cost over time. However, the Public Buildings Department has full confidence in the current project budget, based on a building code analysis and external review, and has the qualified staff in place to complete the project promptly without further cost increases, once the recommended funds are appropriated. As further reassurance, the department has also agreed to provide quarterly in-person progress reports to the CPC (see “additional recommendations” below).

Strategic Planning for Archives The CPC has encouraged a collaborative, interdepartmental approach to preserving Newton’s historical records, by supporting a City Archives survey in 2011 and by inviting a pre-proposal for a City Archives strategic plan, to identify the most cost-effective combination of improved storage facilities and other options such as scanning. However, for the following reasons the CPC recommends funding this project without waiting for that plan to be completed:

- A. Further delay would further increase the cost of this project.
- B. As currently proposed, this project addresses not only archival preservation but urgent accessibility and safety deficiencies in a historic building visited by thousands of Newton schoolchildren and Newton families each year. Most of the project’s increased cost reflects this expanded scope.
- C. Although the Jackson Homestead is a City department, and its archives include some government documents, the archival collecting and curating done by Historic Newton as a public-private partnership goes well beyond City records. Preserving and providing public access to this unique collection is critical to the Homestead’s accreditation as a museum, its service to visitors, and its ability to attract financial support from sources beyond the City budget.
- D. Finally, as it has in the past, Historic Newton will continue collaborating with the City Clerk, the Newton Free Library, and other organizations to ensure the most efficient possible use of Newton’s limited funds, space and staff time for archives.

Funding Leverage The CPC’s current *Funding Guidelines* prioritize projects “that raise the maximum possible funding from non-CPA sources.” As submitted, this proposal originally requested CPA funds for approximately 93 percent of total project costs. The appropriation recommended by the CPC will cover only 88 percent of total costs. Historic Newton has agreed to raise approximately \$40,000 in additional non-CPA funds for FFE (furniture, fixtures and equipment) costs, which will be incurred as the project nears completion.

ADDITIONAL RECOMMENDATIONS (*funding conditions*)

1. Construction will begin within 6 months and be completed within 18 months after additional funds are appropriated; or by any later dates approved in writing by the Director of Planning and Development.
2. The Public Buildings Dept. will provide a brief (5-minute) in-person progress report on the project at a public meeting of the CPC once each quarter until the project is completed.
3. Prior to spending the last 10 percent of appropriated funds, the Public Buildings Department will provide the CPC with an in-person and written final report on the project’s results, including budget-vs.-actual comparisons.
4. The Public Buildings Department will provide the CPC with a brief (1-2 page) summary of preventive maintenance funded at the Jackson Homestead during the 2 years after this project’s completion.
5. Any CPA funds appropriated for this project but not needed or used for the purposes stated herein will be returned to the Newton Community Preservation Fund.

KEY OUTCOMES

The Community Preservation Committee will evaluate this project based on these key outcomes:

1. Completion of the project on time and on or under budget, if possible by utilizing more non-CPA funds than are anticipated in this recommendation.
2. The strategic expansion of two activities long constrained by the Homestead’s inadequate archival space: proactive collecting and active public use.
3. Preservation of the Jackson Homestead’s historic character and the new facilities created by this project through regular preventive maintenance, without reliance on additional CPA funds.

ATTACHMENTS

(delivered to the clerks of the Public Facilities Committee and Finance Committee)

- ♦ draft Board order
- ♦ CPC staff analysis of overall project budget by phase and component
- ♦ Public Buildings/Historic Newton PowerPoint presentation to the CPC on 11 July 2013
- ♦ full proposal, including
 - project summary
 - development budget for this project & operating budget for the Jackson Homestead as a public building
 - site plan
 - project manager's qualifications
 - assessment factors from *Capital Improvement Plan*

and as required by the CPC proposal form, summaries of income/expenses and assets/liabilities for:

- Newton Historical Society (private)
 - Jackson Homestead (City dept.)
 - Public Buildings (City dept.)
- ♦ project history –webpage for this project from “Proposals & Projects – Pending” at www.newtonma.gov/cpa

NOTE: The first 2 documents above are included with this recommendation on the Newton CPC website. Other documents are posted separately on the website.

CITY OF NEWTON
IN BOARD OF ALDERMEN

?? September 2013

ORDERED:

That, in accordance with the recommendations of the Community Preservation Committee (CPC) through its Chairman, Leslie Burg; the Public Facilities Committee through its Chairman Alderman Anthony Salvucci; and the Finance Committee through its Chairman Alderman Leonard J. Gentile, the transfer of previously appropriated funds and an additional appropriation of six hundred forty-one thousand dollars (\$641,000) from the historic resources fund balance of the Community Preservation Fund as shown below, to be expended under the direction of the Public Buildings Department to complete the Museum Archives, Accessibility & Fire Suppression project, as detailed in the CPC's July 2013 funding recommendation to the Board of Aldermen.

Part A. Balance and encumbrances as of the effective date of this order:

From: Museum Archives Preservation (21B60304-5301)
To: Museum Archives, Accessibility & Fire (21B6011504)

Part B. Newly appropriated funds:

From: CPA historic resources fund balance (21-3321B)\$641,000
To: Museum Archives, Accessibility & Fire (21B6011504).....\$641,000

MUSEUM ARCHIVES, ACCESSIBILITY & FIRE SUPPRESSION

17 July 2013,
CPC staff analysis

PROJECT PHASES & COMPONENTS		% of project total	ARCHIVES	% of project total	ACCESSIBILITY	% of project total	FIRE SUPPRESSION	% of project total
DESIGN	\$155,632	18.4%	\$65,316	7.7%	\$65,316	7.7%	\$25,000	3.0%
CONSTRUCTION (incl. contingency)	\$612,765	72.4%	\$225,996	26.7%	\$256,769	30.4%	\$130,000	15.4%
OTHER, including:	\$77,500	9.2%		9.2%	NA		NA	
collections storage & moving			\$27,500					
FFE - furniture, fixtures & equipment			\$50,000					
PROJECT TOTAL	\$845,897	100.0%	\$368,812	43.6%	\$322,085	38.1%	\$155,000	18.3%

Design costs for fire suppression are broken out in the proposal, but other design costs are not allocated to archives vs. access. This analysis uses an arbitrary 50/50 split between those components.

At the 11 July 2013 meeting of the Community Preservation Committee, the Public Buildings Dept. accepted this assignment of FFE 100% to archives.