



Setti D. Warren
Mayor

City of Newton, Massachusetts
Department of Planning and Development
1000 Commonwealth Avenue Newton, Massachusetts 02459

Telephone
(617) 796-1120
Telefax
(617) 796-1142
TDD/TTY
(617) 796-1089
www.newtonma.gov

James Freas,
Acting Director

**Community Preservation Committee
Supplemental Funding Recommendation for
MUSEUM ARCHIVES, ACCESSIBILITY & FIRE SUPPRESSION**

date: 26 May 2015

from: Community Preservation Committee

to: The Honorable Board of Aldermen

PROJECT GOALS & ELIGIBILITY

This project will create museum-standard storage and research space for archival collections in the Jackson Homestead's 17th-century wing, including climate control and fire suppression; provide current, code-compliant accessibility for the entire first floor of the museum; and add sprinklers throughout the 1809 main house. The funding currently requested should allow completion of the work begun with CPA funds from three prior appropriations [Board orders 147-08, 83-10, and 83-10(2)], which also established the project's CPA eligibility.

RECOMMENDED FUNDING

On 14 May 2015, by a vote of 6-0 (members Clarke, Fishman, and Fitzmaurice absent), the Community Preservation Committee recommended appropriating the requested additional \$400,000 to the Public Buildings Dept. for the uses in the following summary budget. All funding should be treated as for historic resources.

MUSEUM ARCHIVES PROJECT BUDGET		as of	% of	as of	% of
USES of FUNDS		June 2013	total	April 2015	total
A.	Consultants (architectural & related services)	\$155,632	18.4%	\$183,213	15.2%
B.	Construction	\$571,117	67.5%	\$789,037	65.4%
	Work by Public Buildings Dept. (repair of any minor damage caused by construction, other work not included in main scope) **	—	—	\$52,500	4.4%
C.	Contingency (** above excluded from 10% calculation in 2015)	\$41,648	4.9%	\$104,895	10.0%
D.	Work by Jackson Homestead/Historic Newton (opening building for contractors, moving & protecting collections during construction)	—	—	\$15,000	1.2%
	Storage/Moving	\$27,500	3.3%	\$14,000	1.2%
E.	Furniture, Fixtures & Equipment	\$50,000	5.9%	\$47,700	4.0%
TOTAL USES		\$845,897		\$1,206,345	
SOURCES of FUNDS					
F.	Historic Newton: private donation committed since 2007	-\$24,000	2.8%	-\$24,000	2.0%
	Historic Newton: requested by CPC 2013; dedicated City fund committed 2014	-\$39,552	4.7%	-\$40,000	3.3%
G.	CDBG: committed 2009-14, past federal spending deadline by 2015	-\$40,000	4.7%	—	0.0%
H.	Previously appropriated CPA funds already spent	-\$101,345	<i>total</i>	-\$183,845	<i>total</i>
	Previously appropriated CPA funds still available	—	<i>CPA %:</i>	-\$558,500	<i>CPA %:</i>
NEW CPA REQUEST (2015 highlighted)		\$641,000	87.8%	\$400,000	94.7%

website www.newtonma.gov/cpa

contact Alice E. Ingerson, Community Preservation Program Manager

email aingerson@newtonma.gov phone 617.796.1144

Note: All issues and recommendations below are repeated, with minor editing and updates, from the CPC's July 2013 recommendation for \$641,000 in final design and construction funds for this project.

SPECIAL ISSUES CONSIDERED BY THE CPC

Project Management As it was in 2013, the CPC remains concerned about the prolonged, complex process of scoping, design and approval that has increased this project's cost over time. The Committee strongly seconded a request by Alderman Deborah Crossley, as chair of the Board's Public Facilities Committee, for more explanatory details about the project's budget history. However, the current budget seems more reliable than previous ones, because it is based on an actual construction bid. During construction, the CPC also hopes that the Public Buildings Dept. will honor its 2013 commitment to provide quarterly in-person progress reports to the CPC, though no reports have been provided to date.

Strategic Planning for Archives In March 2015 the Board of Aldermen appropriated \$20,000 in CPA funds for an interdepartmental strategic plan for all City archives, to identify the most cost-effective combination of improved facilities and other preservation options. However, the CPC recommends completing the Museum project without waiting for this plan, for the same reasons the Committee cited in 2013: Delay will only increase this project's costs – the current budget is based on an accepted construction bid that is valid only through June 2015. A large portion of this project's costs are for safety and accessibility improvements that will protect not only the Jackson Homestead's archives but also its historic building and its many visitors. Improved archival facilities are critical for the Homestead's pending re-accreditation by the American Alliance of Museums. Finally, although the Homestead's new archival facilities will be safer and more usable, they will not be significantly larger. Historic Newton therefore remains committed to working with the City Clerk, the Newton Free Library, and other City departments on a broader, interdepartmental strategy for archives.

Funding Leverage CPA funding is now projected to cover almost 95% of this project's costs. That percentage has risen steadily as the project's total budget has grown. Without setting specific targets, the CPC urged Historic Newton to consider raising additional non-CPA funds and, in collaboration with the Public Buildings Department, both to use appropriated CPA funds efficiently and return some of those funds unspent.

ADDITIONAL RECOMMENDATIONS (all repeated from 2013)

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 full CPC.
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 (all repeated from 2013)

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.
2. The strategic expansion of two Historic Newton activities long constrained by the Jackson Homestead's inadequate archival facilities: 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)

- ♦ **project history** – webpage for this project from “Proposals & Projects – Pending” at www.newtonma.gov/cpa
- ♦ Public Buildings detailed budget history for the project
- ♦ Public Buildings/Historic Newton PowerPoint presentation to the CPC on 14 May 2105
- ♦ full proposal, including - project summary, budget, project manager’s qualifications, and results of construction bidding, March-April 2015

Jackson Homestead Renovation Project

COST ANALYSIS BETWEEN 2007 AND 2015

	2007 Estimate	2009 Estimate	2010 Estimate	2011 Estimate	2013 Estimate	2014/2015 estimate	2015 final bid
<u>A&E/Soft Costs:</u>							
Architect/consultants	\$ 36,000	\$ 116,720	\$ 87,632	\$ 87,632	\$ 149,590	\$ 183,213	\$ 183,213
Legal	\$ 1,500	\$ 2,000					
FF&E	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 10,448	\$ 47,700
Temp. Storage & Moving	\$ 24,828	\$ 24,828	\$ 24,828	\$ 27,500	\$ 27,500	\$ 3,500	\$ 14,000
Work by other department							\$ 15,000
Public building R-M							\$ 52,500
A&E/Soft Costs Total:	\$ 112,328	\$ 193,548	\$ 162,460	\$ 165,132	\$ 227,090	\$ 197,161	\$ 312,413
<u>Construction Costs</u>							
Fire Protection (Sprinkler)					\$ 125,000	\$ 77,060	\$ 125,000
Electrical Work						\$ 178,421	\$ 122,000
HVAC						\$ 55,640	\$ 78,500
Plumbing						\$ 18,170	\$ 24,900
General Construction	\$ 263,447	\$ 452,297	\$ 375,000	\$ 428,960	\$ 446,117	\$ 559,787	\$ 438,637
Total	\$ 263,447	\$ 452,297	\$ 375,000	\$ 428,960	\$ 571,117	\$ 889,078	\$ 789,037
Hazardous Materials			\$ 3,000	\$ 3,000	\$ 3,000	\$ 5,000	
Construction Total	\$ 263,447	\$ 452,297	\$ 378,000	\$ 431,960	\$ 574,117	\$ 894,078	\$ 789,037
Total project cost	\$ 375,775	\$ 645,845	\$ 540,460	\$ 597,092	\$ 801,207	\$ 1,091,239	\$ 1,101,450
Project Contingency	\$ 18,789	\$ 32,292	\$ 27,023	\$ 29,855	\$ 41,648	\$ 109,000	\$ 104,895
Total Project cost:	\$ 394,564	\$ 678,137	\$ 567,483	\$ 626,947	\$ 842,855	\$ 1,200,239	\$ 1,206,345