



# Finance Committee Agenda

## City of Newton In City Council

Wednesday, September 28, 2022

The Finance Committee will hold this meeting as a virtual meeting on Wednesday, September 28, 2022 at 7:00 pm. To view this meeting using Zoom use this link: or call <https://us02web.zoom.us/j/83873261871> 1-646-558-8656 and use the following Meeting ID: 838 7326 1871

### Items scheduled for discussion:

#### Referred to Public Facilities and Finance Committees

#413-22

##### **Appropriate \$4,120,000 for the Pump Station Rehabilitation CIP Projects**

HER HONOR THE MAYOR requesting authorization to appropriate and expend four million one hundred twenty thousand dollars (\$4,120,000) and authorize a general obligation borrowing of an equal amount for the construction and engineering services for the City of Newton Pump Station Rehabilitation CIP Project 1 and design for Project 2 and authorization to apply any premium received upon the sale of the bonds or notes, less the cost of preparing, issuing, and marketing them, and any accrued interest received upon the delivery of the bonds or notes to the costs of the project and to reduce the amount authorized to be borrowed for the project by like amount.

**Public Facilities Approved as Amended to \$4,127,000 5-0 on 09/21/22**

#### Referred to Public Facilities and Finance Committees

#454-22

##### **Amendments to Chapters 11 and 17 to the City of Newton Ordinances**

HER HONOR THE MAYOR requesting amendments to the City of Newton Ordinances regarding trash and recycling (Chapter 11 and Chapter 17) to allow the City to create a mattress recycling program needed to comply with a significant upcoming change in MassDEP regulations for mattresses.

**Public Facilities Approved 5-0 on 09/21/22**

#### Referred to Public Facilities and Finance Committees

#442-22

##### **Transfer \$250,000 for the under \$75,000 projects**

HER HONOR THE MAYOR requesting authorization to transfer the sum of two hundred fifty thousand dollars (\$250,000) from Acct #0111502-582500 Building Improvements, (Under \$75K projects) to a new 01C115 account.

**Public Facilities Approved 5-0 on 09/21/22**

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The location of this meeting is 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 Coordinator, Jini Fairley, at least two business days in advance of the meeting: [jfairley@newtonma.gov](mailto: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.

**Referred to Public Facilities and Finance Committees**

**#440-22**

**CPC Recommendation to appropriate \$75,000 in CPA funding**

COMMUNITY PRESERVATION COMMITTEE recommending appropriation of seventy five thousand dollars (\$75,000) in Community Preservation Act funding from the FY23 Historic Resource Reserve Fund to the control of the Planning & Development Department to complete the first phase of the Jackson Homestead Basement Restoration Project by hiring a preservation consultant to develop plans to remediate the existing water and humidity issues in order to preserve the historic structure and protect its important collections.

**Public Facilities Held 8-0 on 09/08/22**

**Public Facilities Approved 5-0 on 09/21/22**

**Referred to Zoning & Planning and Finance Committees**

**#436-22**

**CPC Recommendation to appropriate \$1,948,056 in CPA funding**

COMMUNITY PRESERVATION COMMITTEE recommending appropriation of one million nine hundred forty eight thousand fifty six dollars (\$1,948,056) in Community Preservation Act funding, with \$556,588 to come from the FY23 Community Housing Reserve Account and \$1,391,468 to come from FY23 Unrestricted Funding Account, to the control of the Planning & Development Department to provide funding to the Newton Affordable Housing Trust for future projects that meet one or more of the CPA's eligible funding categories for Community Housing projects.

**Zoning & Planning Approved 8-0 on 09/12/22**

**#386-22**

**Discussion with Administration regarding Consultants, including the process of selection, project oversight, billing, and contract negotiation**

COUNCILORS LAREDO, OLIVER, MARKIEWICZ, GROSSMAN, KALIS, HUMPHREY, WRIGHT, MALAKIE, BAKER, NORTON, GENTILE, LIPOF, AND LUCAS requesting a discussion with the Administration regarding the process for selecting and overseeing the work of consultants retained by the city including (a) the criteria for when consultants are selected without a bidding process; (a) how contracts with consultants are negotiated; (c) the process for creating change orders in consulting contracts; (d) what detail is expected in bills submitted by consultants and the process for review and approval of such bills; and (e) whether bills submitted by consultants have ever been rejected or challenged and the reasons for such rejections or challenges.

**Respectfully submitted,**

**Rebecca Walker Grossman, Chair**



RUTHANNE FULLER  
MAYOR

City of Newton, Massachusetts  
Office of the Mayor

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August 1, 2022

Honorable City Council  
Newton City Hall  
1000 Commonwealth Avenue  
Newton Centre, MA 02459

Councilors:

I respectfully submit a docket item to your Honorable Council requesting authorization to appropriate and expend \$4,120,000 and authorize a general obligation borrowing of an equal amount for the construction and engineering services for the City of Newton Pump Station Rehabilitation CIP Project 1 and design for Project 2. Details of the project are attached.

Further, I request that your Honorable Council authorize any premium received upon the sale of the bonds or notes, less the cost of preparing, issuing and marketing them, and any accrued interest received upon the delivery of the bonds or notes be applied to the costs of the project being financed by the bonds or notes and to reduce the amount authorized to be borrowed for the project by a like amount.

Thank you for your consideration of this matter.

Sincerely,

Ruthanne Fuller  
Mayor

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Newton City Clerk  
2022 AUG - 1 PM 3:02

DEPARTMENT OF PUBLIC WORKS  
OFFICE OF THE COMMISSIONER  
1000 Commonwealth Avenue  
Newton Centre, MA 02459-1449  
Ruthanne Fuller-Mayor  
January 28, 2021

**To:** Maureen Lemieux, Chief Financial Officer

**From:** James McGonagle, Commissioner of Public Works  
Thomas Fitzgerald, Utilities Director  
Kelly Cadman, Financial Director DPW

**Subject:** Request to Docket funding in the amount of \$4,127,000.00 for Construction and Engineering Services for the City of Newton Pump Station Rehabilitation CIP Project 1 and Design for Project 2

**Brief Description:**

The City of Newton Department of Public Works-Utilities Division operates and maintains twelve (11) wastewater pump stations, one (1) stormwater pump station and three (3) potable water booster stations throughout the City. The mechanical, electrical and HVAC components of these stations were last rehabilitated in 1990-1991. The City entered into an Engineering Agreement with Brown & Caldwell to perform a Pumps Station Condition and Performance Assessment in order to develop a 10 year Capital Improvement Plan

The scope of work for the construction (attached) for CIP Project 1 consists of the following:

- Replace Heating, Ventilation and Dehumidification at Quinobequin Road, Elliot Street, Islington Road and Edgewater Park wastewater pump stations.
- Replacement of the discharge piping within the wet wells of the Hamlet Street and Grayson Lane wastewater pump stations.
- Replacement of the main influent gate valves at the Quinobequin Road and Elliot Street wastewater pump stations.
- Replacement of the wet well isolation gate valves at the Elliot Street wastewater pump station.
- The replacement of the Oldham Road Pump Station.

Included with this request is Engineering Services During Construction and Engineering Services for the Design of Project 2 (attached)

Please docket this request with the Honorable City Council for their consideration.

Sincerely,

James McGonagle  
Commissioner Public Works

## Attachment A

# Scope of Work for City of Newton Pump Station Rehabilitation CIP Project 1 – Services During Construction

May 27, 2022

The Brown and Caldwell (BC) scope of work is provided below. The objective of the project is to provide the City of Newton with engineering services during construction for Pump Station Rehabilitation -Project 1.

### Project Understanding

The proposed scope is comprised of engineering services during construction tasks associated with the construction of the pump station rehabilitation work as part of Project 1.

### Pump Station Rehabilitation

The scope for this project is to provide rehabilitation and replacement work critical to improving the serviceable lifespan of the aging equipment at Newton's largest pump stations, as well as mitigating issues at multiple facilities that severely threaten the reliable operation of the pump station. The scope of this work will include the following:

#### Quinobequin Road, Elliot Street, Islington Road, Edgewater Park Pump Stations

- Demolish existing exhaust fans and install new supply and exhaust fans sized to provide air changes required by NFPA 820 or as allowed by electrical and spatial constraints.
- Install ductwork to provide supply ventilation and modify existing exhaust ductwork if required.
- Demolish the existing failed dehumidifiers and replace with units sized appropriately.
- Demolish unit heaters and replace with units sized for the improved air change rate.
- Demolish and replace existing carbon filters.
- Install gas monitoring and loss of ventilation alarming where required and wired back to SCADA.

#### Hamlet Street and Grayson Pump Stations

- Replacement of the force main and suction piping within the wet well of both pump stations.

#### Quinobequin Road and Elliot Street Pump Stations

- Replacement of the main influent gate at Quinobequin Road Pump Station which does not reliably close.
- Replacement of the main influent gate at Elliot Street Pump Station which is currently damaged and in danger of failing and sealing off flow to the pump station.
- Replacement or complete removal of wet well isolation gates within Elliot Street Pump Station which have not been operated in years and are damaged from corrosion.

### Replacement of Oldham Road Pump Station

The scope for the replacement of Oldham Road Pump Station Project is to replace the failing pump station with a facility that eliminates the need for confined space entry. The scope of this project will include the following:

- Evaluation of site and existing pump station drywell to confirm that it can be converted into a submersible pump station.
- Development of a performance based bypass specification
- Demolition of the existing pumps and piping within the pump station interior.
- Rehabilitation/demolition/replacement of existing subsurface structures and utilities.
- Installation of a new valve vault.
- Replacement of electrical equipment.
- Installation of two 300 gpm submersible pumps.

### Phase 100 Engineering Services During Construction

**Objective:** BC will provide general engineering services during construction for the duration of the construction Projects.

**Activities:** This task includes the following activities:

- Provide overall project management. Task includes monthly reports, invoicing, team and subcontractor coordination, contract communications, scheduling, and oversight.
- Provide general construction administration. BC shall provide consultation and advice during construction and provide technical engineering support during construction activities. Update and modify the Contract Documents to meet changed site and project conditions or variations in State/Federal requirements as necessary to supplement and/or provide clarity to the Contract Documents during the construction phase of the project (to address RFIs, Change Orders, and other issues requiring modified Contract Documents). This does not include revisions required for Record Drawings as required in subsequent sections of this Scope.
- Attend pre-construction conference and distribute minutes
- Attend progress meetings, BC shall assume progress meetings are held once per month during active construction. In addition to attendance at the progress meetings, BC shall facilitate the meetings, prepare a package for each meeting containing agenda, submittals log, RFI logs, and PCO/Change Order logs (Excel spreadsheets or Primavera logs) to be reviewed at each meeting, and a 3-week look



ahead schedule (to be provided by General Contractor), and other documentation that may be required for meetings that are not specified. Meeting minutes will be prepared by BC and provided to the City.

- Coordination with other municipal agencies as required during monthly progress meetings. BC assumes no effort beyond typical tasks associated with monthly progress meetings.
- Attend monthly project management meetings. BC shall assume that Project Management Meetings will be held subsequent to Construction Progress Meetings on an as-needed basis.
- Attend issue resolution meetings. BC assumes construction related issues will arise that will require formal meetings between the contractor, the City and BC to reach an agreeable resolution. BC shall assume no effort beyond typical tasks associated with monthly progress meetings.
- BC shall review all shop drawing submittals prepared by the contractors along with associated illustrations, samples, and other submittals required by the Contract Documents. BC shall assume 50 submittals requiring review. A table listing the submittals and number of reviews will be included as an attachment for the City's review. BC shall review and respond to all submittals, shop drawings, samples within fourteen (14) calendar days. BC shall coordinate and track submittals, including preparing and maintaining a submittal log, and BC will distribute the shop drawings and submittals. Copies of each submittal including subsequent revisions shall be provided to the City.
- BC shall respond to Requests for Information submitted by the contractor. BC shall assume 5 RFIs. BC shall coordinate and track RFI's, including preparing and maintaining a RFI log. Copies of each RFI including responses and subsequent revisions shall be provided to the City. Review and provide recommendations for approval of payment requisitions. BC shall issue necessary clarifications and interpretations of the Contract Documents as appropriate for the orderly completion of the work. Such clarifications and interpretations will be consistent with the intent of and reasonably inferable from the Contract Documents. BC may issue Field Orders authorizing minor variations from the requirements of the Contract Documents through coordination with City. BC shall recommend Change Orders and Work Change Directives to the City as appropriate, and shall prepare written recommendations concerning Change Orders and Work Change Directives as required in consultation with the City.
- Development of RFP has not been included in BC's scope of work.
- Review applications for payment. Based on BC's observations and on review of Applications for Payment and accompanying supporting documentation: Determine the amounts that Engineer recommends Contractor be paid. Recommend reductions in payment based on the provisions stated in the Construction Contract. Such recommendations of payment will be in writing and will constitute Engineer's representation to Authority, based on such observations and review, that, to the best of Engineer's knowledge, information and belief, Contractor's Work has progressed to the point indicated, the Work is generally in accordance with the Construction Contract Documents (subject to an evaluation of the Work as a functioning whole prior to or upon Substantial Completion, to the results of any subsequent tests called for in the Contract Documents, and to any other qualifications stated in the recommendation), and the conditions precedent to Contractor's being entitled to such payment appear to have been fulfilled in so far as it is Engineer's responsibility to observe the Work. In the case of unit price Work, Engineer's recommendations of payment will include final determinations of quantities and classifications of the Work (subject to any subsequent adjustments allowed by the Contract Documents).
- Attendance of commissioning team meetings. BC shall attend meetings with the City, contractors, and any necessary vendors or equipment representatives to coordinate system and equipment startups. BC

assumes these meetings will be scheduled in conjunction with progress meetings and will require no additional effort.

- Prepare record drawings. BC shall prepare record drawings that reflect as-built conditions based on information provided by the City, the construction contractor, and BC's own on-site inspections. BC shall reconcile and log that all construction document changes (i.e., shop drawings, RFIs, Field Change Orders, etc.) have been incorporated into the record drawings.
- Attendance of closeout meeting. BC shall attend a close out meeting with the City and construction contractor to officially close-out the project and to discuss warranty procedures.

## **Phase 200 Field Services During Construction**

**Objective:** BC will perform field visits during construction for the duration of the construction Projects.

**Activities:** This task includes the following activities:

- Perform Field Visits. BC assumes that periodic visits to site will be required to observe progress and assure compliance with the contract documents and design intent. BC shall assume a maximum of two (2) field visit per week through the duration of the construction project. However, BC assumes daily field fields will be required during a 3-month period while the rehab of Oldham Road Pump Station is underway. BC shall make visits to the site at intervals appropriate to the various stages of construction as BC deems necessary to monitor the Contractor's work for compliance with the contract documents as outlined above. The visit may coincide with the progress meeting if the progress meeting is held on site. Such visits and observations are not intended to be exhaustive or to extend to every aspect of the work in progress, or to involve detailed inspections of the work beyond the responsibilities specifically assigned in this scope of services and the Contract Documents, but rather are to be limited to spot checking, selective sampling and similar methods of general observation of the work based on BC's exercise of professional judgment as assisted by the City. Based on information obtained during such visits and such observations, and from the City, BC shall determine in general if such work is proceeding in accordance with the Contract Documents and BC shall keep the City informed of the progress of the work.
- During the site visits, BC shall notify the City if BC believes that work should be rejected because such work will not produce a completed Project that conforms generally to the Contract Documents or that it will prejudice the integrity of the design concept of the completed Project as a functioning whole as indicated in the Contract Documents.
- Provide field support during start-up. BC shall provide on-site personnel during equipment startups to provide assistance to the contractor and equipment vendors as needed and to confirm that equipment is performing as designed and expected. The work of this item shall also include the development of a process start-up plan that will be used a guide and to coordinate equipment startups. BC will schedule period site visits to coincide with startup activities. BC shall provide technical engineering support and on-site personnel for specific functional and performance testing that may be required by the Contract Documents to confirm that specified process systems are performing as designed and specified. This shall include providing assistance to the City in coordination of required testing with the contractor, City, and other agencies (as may be required). The work associated with this item shall include all the development of process start-up plans, testing forms/documentation, scheduling, observing testing, compiling results, and other activities required by the Contract Documents.
- Instrumentation check out services. BC shall perform checkout services of the instrumentation and control equipment installed by the contractor. BC shall witness and document control loop check-outs,



perform a check of the control strategy (remote manual/remote auto/final testing), and provide follow-up control systems work as needed after the system is started up and running. BC will perform checkouts in conjunction with periodic site visits and assumes no additional effort.

- Determination of substantial completion. Following notice from the Contractor that the Contractor considers the entire work ready for its intended use, BC and the City, accompanied by the Contractor, shall conduct an inspection to determine if the work is substantially complete. BC shall deliver a certificate of Substantial Completion to the City and Contractor after the resolution of any objections of the City and BC and after it is mutually agreed upon by the City and BC that the certificate of Substantial Completion shall be issued. Before BC issues a Certificate of Substantial Completion, submit to Contractor a list of observed items requiring completion or correction (Punch list). Determine whether necessary inspections and approvals by public agencies having jurisdiction over the Work have been performed and advise the City accordingly.
- Final site inspection. BC shall perform a final site inspection and walk-through of all the project areas with the City, CM, Resident and Contractor to determine final completion status. BC shall prepare a final report and submit it to the City for review and acceptance. BC shall assume one 4-hour day on site.
- Provide final notice of acceptability of the work. BC and City shall conduct a final inspection to determine if the completed work of Contractor is acceptable so that BC may recommend, in writing, final payment to Contractor. Accompanying the recommendation for final payment, BC shall indicate that the work is acceptable to the best of BC's knowledge, information and belief and based on the extent of the services performed and furnished by BC under this scope of services.

**Deliverables:** Meeting minutes, submittal reviews, RFI reviews, pay application review, record drawings, substantial and final completion recommendations

### Overall Project Assumptions

1. The City's integrator will be responsible for integrating new signals resulting from this project, this would include HVAC related alarms and sensors and additional inputs.
2. BC is not responsible for additional effort that may be required for issues related to unknown conditions that may impact the design or construction.
3. Generally, BC shall assume a maximum of two (2) field visit per week through the duration of the active construction period (1 -year). However, it is assumed daily field fields will be required during a 3-month period while the rehab of Oldham Road Pump Station is underway.

### Schedule

It assumed that the total construction contract period will be a 1 year & 6 months duration with 1 year of active construction.

## Attachment A

# Scope of Work for City of Newton Pump Station Rehabilitation CIP Project 2

May 27, 2022

The Brown and Caldwell (BC) scope of work is provided below. The objective of the project is to provide the City of Newton with engineering design services for critical rehabilitation and improvements work identified in the recent pump station condition and performance assessment.

### Project Understanding

The proposed scope is comprised of engineering design services to address issues with critical equipment/infrastructure identified during the recent pump station condition and performance assessment.

### Pump Station Rehabilitation

The scope for this project includes critical architectural repair work at Quinobequin Road Pump Station, process mechanical valve replacement work at Elliot Street Pump Station and pump replacement at Manet Road and Edgewater Park Pump Stations. The scope of this work will include the following:

#### Quinobequin Road

- Demolish existing slate roof and replace with an alternative roofing system.
- Repoint the existing brick chimney and other identified areas
- Demolish and replace the brick entrance steps
- Recaulking around openings and penetrations around the building exterior
- Repaving of the driveway
- Any other issues identified during a detailed site review conducted by BC's architectural staff.

#### Elliot Street Pump Station

- Replacement of pump isolation valves
- Replacement of pump discharge check valves

#### Manet Road Pump Station

- Replacement of both pumps
- Crack repair of the leak in the vicinity of the pump VFDS

#### Edgewater Park Pump Station

- Replacement of pumps and discharge and suction valves

## Phase 100 Project and Design Management

The purpose of this task is to provide for the initiation and overall management of Project and Design activities. An overall schedule and work plan will be implemented so that work activities are completed in a properly-integrated and timely manner. In addition, this task includes those elements necessary to properly manage, lead, and control the Project.

- A project kickoff conference call will be organized to discuss the project goals and objectives, scope of work, deliverables, schedule, critical success factors, and establish lines of communications with the project team.
- A Project Schedule showing conceptual dates for deliverables and anticipated dates for workshops, QC reviews, meetings, and submittals will be prepared and provided.
- BC will share monthly status updates with City staff and provide information on the activities, information needs, schedule, and budget for the various tasks. The monthly status update will be included with the invoice.
- Conference calls will be scheduled as needed to resolve questions, obtain direction, and communicate with City staff.
- Communicate changes in scope of project if new information is identified that changes the proposed alternatives for evaluation or scope of conceptual design.
- BC will manage the health, safety, and environmental activities of its staff to achieve compliance with applicable health and safety laws and regulations. In accordance with standard procedures, BC will prepare Field Safety Instructions that contain fundamental health and safety information that must be followed by employees involved in field activities.
- BC will maintain Project records, manage and process Project communications, and coordinate Project administrative matters.
- As part of the Project Management Plan for this project, BC will develop and implement a quality assurance/quality control (QAQC) program. Senior reviewers will participate and perform internal QAQC review of work products for project deliverables and milestones. Issues identified during the formal internal QAQC review will be addressed prior to submittal to the City of Newton. Formal QAQC periods will be included in the project schedule and this project schedule will be revisited at all internal team meetings.

## Phase 200 Evaluations

**Objective:** Confirm or adjust the critical projects identified in the project understanding section.

- Perform field visit at Quinobequin Road Pump Station with architectural design staff to confirm assumptions.
- Conduct a hazardous material assessment at Quinobequin Road to determine if hazardous construction material are present that may be disturbed by building improvements.

**Activities:** This task includes the following activities:

- Architectural design staff will perform a tour of the Quinobequin Road Pump Station.
- Hazardous materials sample collection and lab analysis

**Deliverables:**

- Architectural field review memo
- Hazardous material sampling results report

**City of Newton responsibilities:**

- Allow access to pump stations for field visits

**Phase 300 Design Documents**

**Objective:** Prepare detailed design drawings, specifications and contract documents at 60%, 90% and 100% design stages.

**Activities:** This task includes the following activities:

- Meetings with the City after delivery of the 60%, and 90% design documents.
- Review of available drawings previously furnished by the City.
- Preparation of final plans, sections, and job specific details drawings.
- Preparation of contract specifications.
- Preparation of a quantity take-off and opinion of probable construction cost provided with the delivery of the 60% design document and updated at the 90% design document.
- Obtaining Massachusetts Prevailing Wage Rates and inserting them into the specifications.

**Deliverables:** .PDFs and Four (4) hardcopy sets of review copies of the drawings, specifications and other contract documents during the 60%, 90% and 100% design.

- CADD files
- Design meeting minutes

**City of Newton responsibilities:**

- Assist with identifying key scheduling milestones
- Participate in meetings
- Review, and provide comments

**Phase 500 Bidding Services**

**Objective:** Support the City during the bidding phase by facilitating a pre-bid meeting, answering questions, issuing addenda, and reviewing bids and recommending award.

**Activities:** This task includes the following activities:

- Facilitate a pre-bid meeting.
- Formally respond to bidder questions.
- Prepare and distribute addenda as required to clarify, correct, or change the issued documents.
- Aid the City in securing bids, tabulating bid results, analyzing bid results, and making recommendations on the award of each construction contract.

**Deliverables:**

- Ten (10) sets of final construction documents (contract drawings, final specifications, and other documents) required for bidding and construction purposes
- Digital .pdf file of final construction documents
- Pre-bid meeting minutes

**Overall Project Assumptions**

1. Project documents will be developed into filed sub-bids in accordance with Massachusetts state law.
2. BC shall utilize the City's "front-end" documents, specifications and drawings will be developed in accordance with BC's standards.
3. BC assumes pdf plans are available for Manet Rd. Pump Station.
4. City of Newton will provide safe access to all required areas of the site for the purposes of project design.
5. City of Newton will review the draft deliverables for accuracy of understanding of the issues and data assumptions. City of Newton will provide one set of compiled written comments.
6. BC is not responsible for any schedule or cost impacts related to delays caused by protracted reviews, changes in scope of work, or other situations outside of our control.
7. BC is not responsible for additional effort that may be required for issues related to unknown conditions that may impact the design or construction.

## **Schedule**

Project will commence with written notice to proceed (NTP) provided by the City of Newton. 6 months is estimated for design and bidding of the project.



## Preliminary Drawing List

### Pump Station Rehabilitation

<b>Drawing No.</b>	<b>Title</b>
G-000-01	Cover Sheet
G-000-02	Location plans – Quinobequin Rd. PS, Elliot St. PS, Manet Rd. PS, Edgewater Park PS
G-000-03	Abbreviations
G-000-04	General Notes and Symbols
G-000-05	Architectural Notes
G-000-06	Structural notes
G-000-07	Process Mechanical Notes and Symbols
G-000-08	Process Mechanical Notes Continued
A-000-01	Architectural Details
A-000-02	Architectural Details II
A-100-01	Quinobequin Rd. Pump Station Plan
A-100-02	Quinobequin Rd. Pump Station Roof Plan
A-100-03	Quinobequin Rd. Pump Station Elevations
M-000-01	Process Mechanical Details
M-200-01	Elliot St. Pump Station Pump Level – Demolition and Replacement - Plan
M-200-02	Elliot St. Pump Station Pump Level – Demolition and Replacement - Sections
M-300-01	Manet Rd. Pump Station Pump Level – Demolition and Replacement – Plan and Section
M-400-02	Edgewater Park Pump Station Pump Level – Demolition and Replacement – Plan and Section



RUTHANNE FULLER  
MAYOR

City of Newton, Massachusetts  
Office of the Mayor

RECEIVED  
2022 SEP 14 PM 12:39

CITY CLERK  
NEWTON, MA 02459

**454-22**

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[rfuller@newtonma.gov](mailto:rfuller@newtonma.gov)

September 14, 2022

Honorable City Council  
Newton City Hall  
1000 Commonwealth Avenue  
Newton Centre, MA 02459

Councilors:

I respectfully submit a docket item to your Honorable Council requesting changes to City Ordinances regarding trash and recycling (Chapter 11 and Chapter 17) to allow the City to create a mattress recycling program needed to comply with a significant upcoming change in MassDEP regulations for mattresses.

MassDEP has enacted regulations banning mattresses (and box springs) from disposal and requiring recycling effective November 1, 2022. The City has developed a new mattress recycling program to comply with the State regulations. This program will require ordinance changes to set a fee for curbside collection of mattresses and box springs and for drop-off at the City's Resource Recovery Center on Rumford Avenue.

Under the new program, residents can drop off mattresses and box springs for recycling at the Resources Recovery Center for \$35 per piece. Residents can also request curbside collection for \$50 per piece. A mattress recycling vendor that the City will contract with will perform weekly curbside collection and also pick up those stored at the Resources Recovery Center in a 20' shipping container. The mattresses and box springs will be transported to a recycling center.

A memo from Director of Sustainable Materials Management Waneta Trabert is attached detailing the current program, the new state requirements, the proposed new city program, and additional considerations.

Thank you for your consideration of this matter.

Sincerely,

Ruthanne Fuller  
Mayor



To: Shawna Sullivan, DPW Deputy Commissioner  
From: Waneta Trabert, Sustainable Materials Management Director  
Subject: **Proposed Mattress Recycling Program**  
Date: 8/31/22

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- Mattresses are banned from disposal effective November 1, 2022 per MassDEP regulations and therefore must be recycled at end of life.
- The development of a new mattress recycling program is needed to comply with state regulations.
- An ordinance change is required to set the fee for mattress recycling. The cost of transporting mattresses is high because they are bulky and laborious to maneuver.

**Current program:**

- Mattresses are collected curbside upon request by residents for a fee of \$20 per piece
- Mattresses are sent for disposal at the Millbury waste-to-energy facility

**What's Included in the Ban:**

- All sizes of mattresses including California king, king, queen, full, twin XL, twin, and crib mattresses
- All memory foam mattresses and "mattresses in a box"
- All box springs

**Not included in the Ban:**

- Futon mattresses and fold-out sofa beds
- Mattress pads and toppers
- Any mattress that is excessively torn, punctured, soiled, or moldy
- Any mattress that is wet or infested with bed bugs or other pests

**Proposed program:**

- Residents can drop-off mattresses for recycling at a cost of \$35 per piece to the Resource Recovery Center
- Residents can request curbside collection of mattresses for \$50 per piece
- Mattresses will be stored at the Resource Recovery Center in a 20ft. shipping container
  - Resource Recovery Center staff will need to stack mattresses to make efficient use of space
- Curbside collection will be performed weekly by the mattress recycling vendor; they will also pick up mattresses from the storage container at the Resource Recovery Center each week

**Anticipated additional program considerations:**

- Illegal dumping of mattresses currently occurs with the bulky waste fee-based collection model. A slight increase in illegally dumped mattresses is likely. Illegally dumped mattresses will need to be picked up by city staff and brought to the storage container at the Resource Recovery Center.
- Mattresses that are deemed to be in unrecyclable condition (wet, moldy, otherwise contaminated) will need to be documented and put into the trash compactors at the Resource Recovery Center by DPW staff
- Communication to all city departments and NPS should be sent out by mid-October to prevent any mattresses from being disposed of at any sites with roll-off containers
- All public communications about the bulky waste collection program will be updated to remove mattresses; new public communications will be published with information about the new mattress program by the starting date of the program

**Sec. 11-1. Definitions.**

*Bulky waste items:* Bulky waste items are large items that are burnable, such as discarded or broken furniture, large toys, ~~mattresses~~, rugs, and other large or unwieldy refuse that cannot be placed in the assigned receptacle. Hard plastic and metal items are not bulky items.

Mattress: Any resilient material or combination of materials that is enclosed by ticking, used alone or in combination with other products, and that is intended for sleeping upon, including, but not limited to any foundation or box spring. Mattresses do not include any mattress pad, mattress topper, and futons and sofa beds.

**Sec. 11-14. Bulky waste items and mattresses.**

(a) Bulky waste items and mattresses may be removed from the curb and ~~disposed~~ properly managed ~~of~~ by the department of public works upon application to the commissioner of public works by the owner or occupant of a building or premises who shall pay a fee of twenty dollars (\$20.00) per bulky waste item and fifty dollars (\$50.00) per mattress. All materials set out for curbside removal shall be of such form and so prepared and placed as the commissioner of public works may specify or accept, otherwise they shall not be removed by the city.

(b) The commissioner of public works in his/her sole discretion may remove and ~~dispose~~ properly ~~manage~~ of bulky waste items and/or mattresses that have been set out for collection without application and in accordance with section 16. Failure to apply for removal of bulky waste items and/or mattresses shall be subject to penalties provided in section 9(a).

(c) Mattresses will be accepted at the Newton Resource Recovery Center upon application to the commissioner of public works by the owner or occupant of a building or premises in Newton who shall pay a fee of thirty-five dollars (\$35.00) per item.

**Sec. 17-16. Fees to be paid to the Department of Public Works**

- (a) Recycling and Trash – Non-profits ..... See Sec. 11-6
- (b) White Goods (large appliances, scrap metal, including electronics) curbside recycling Pickup (Sec. 11-15)  
per item, ..... \$25.00
- (c) TV and computer monitor recycling drop off at Newton Resource Recovery Center per item, \$25.00
- (d) Residential curbside pickup of bulky waste items for disposal (Sec. 11-14) .....per item, \$20.00
- (e) Residential curbside pickup of mattresses recycling (Sec. 11-14).....per item, \$50.00
- (f) Mattress recycling drop off at Newton Resource Recovery Center (Sec. 11-14).....per item, \$35.00
- (ge) Awning, shades and marquee permit (Sec. 26-2)..... \$1.00



RUTHANNE FULLER  
MAYOR

**City of Newton, Massachusetts  
Office of the Mayor**

Telephone  
(617) 796-1100  
Telefax  
(617) 796-1113  
TDD  
(617) 796-1089  
E-mail  
[rfuller@newtonma.gov](mailto:rfuller@newtonma.gov)

August 29, 2022

Honorable City Council  
Newton City Hall  
1000 Commonwealth Avenue  
Newton Centre, MA 02459

Councilors:

I respectfully submit a docket item to your Honorable Council requesting authorization to transfer the sum of \$250,000 from account number 0111502-582500, Building Improvements, (Under \$75K projects) to a new 01C115 account. The 01C115 accounts are for non-lapsing projects which is the appropriate type of account for our under \$75K projects.

During the budget process we realized that the annual budget council order had been changed so that the language no longer allowed the Comptroller to reclassify this budgeted item to a 01C115 account. Beginning with the FY24 Budget, we will include the appropriate language in the Council Order.

Thank you for your consideration of this matter.

Sincerely,

A handwritten signature in black ink that reads "Ruthanne Fuller".

Ruthanne Fuller  
Mayor





**CITY OF NEWTON, MASSACHUSETTS**  
**PUBLIC BUILDINGS DEPARTMENT**  
52 ELLIOT STREET, NEWTON HIGHLANDS, MA 02461

Ruthanne Fuller, Mayor  
Josh Morse  
Building Commissioner

Telephone (617) 796-1600  
Facsimile (617) 796-1601  
TDD/tty # (617) 796-1608

July 1, 2022

Ruthanne Fuller, Mayor  
Newton City Hall  
1000 Commonwealth Avenue  
Newton Centre, MA 02459

Re: FY 23 Budget – Under \$75K Projects line-item modification

Dear Mayor Fuller:

The Public Buildings Department requests that account number 0111502-582500, Building Improvements, (Under \$75K projects) in the amount of \$250,000 be modified by creating a new account 01C115.

Sincerely,

Josh Morse  
Public Buildings Commissioner

cc: Maureen Lemieux, Chief Financial Officer  
Alex Valcarce, Deputy Buildings Commissioner

CITY OF NEWTON

IN CITY COUNCIL

DRAFT

ORDERED:

That, in accordance with the recommendation of the Public Facilities Committee through its Chair Finance Committee through its Chair Rebecca Walker Grossman, to transfer the sum of two hundred fifty thousand dollars (\$250,000) from Acct #0111502-582500 Building Improvements, (Under \$75K projects) to a new 01C115 account be and is hereby approved as follows:

FROM:	Public Buildings- Building Improvements (0111502-582500).....	\$250,000
TO:	Building Improvement Projects (01C11533-582500) .....	\$800,000

Under Suspension of Rules  
Readings Waived and Approved  
DRAFT

(SGD) CAROL MOORE  
City Clerk

(SGD) RUTHANNE FULLER  
Mayor

Date: \_\_\_\_\_

CITY COUNCIL

# \_\_\_\_\_

RECEIVED

CITY OF NEWTON

DOCKET REQUEST FORM

2022 AUG 23 PM 4: 51

**DEADLINE NOTICE: Council Rules require items to be docketed with the Clerk of the Council NO LATER THAN 7:45 P.M. ON THE MONDAY PRIOR TO A FULL COUNCIL MEETING.**

To: Clerk of the City Council

Date: August 23, 2022

From (Docketer): Lara Kritzer, Community Preservation Program Manager

Address: Planning Department, Newton City Hall, 1000 Commonwealth Avenue Newton MA 02459

Phone: 617-796-1144

E-mail: lkritzer@newtonma.gov

Additional sponsors: Community Preservation Committee

1. Please docket the following item (it will be edited for length if necessary):

Recommendation from the Community Preservation Committee that \$75,000 in Community Preservation Act funding be appropriated from the FY23 Historic Resource Reserve Fund to the control of the Planning & Development Department to complete the first phase of the Jackson Homestead Basement Restoration Project by hiring a preservation consultant to develop plans to remediate the existing water and humidity issues in order to preserve the historic structure and protect its important collections.

2. The purpose and intended outcome of this item is:

- Fact-finding & discussion
- Appropriation, transfer,
- Expenditure, or bond authorization
- Special permit, site plan approval,
- Zone change (public hearing required)
- Ordinance change
- Resolution
- License or renewal
- Appointment confirmation
- Other: \_\_\_\_\_

3. I recommend that this item be assigned to the following committees:

- Programs & Services
- Zoning & Planning
- Public Facilities
- Finance
- Public Safety
- Land Use
- Real Property
- Special Committee
- No Opinion

4. This item should be taken up in committee:

Immediately (Emergency only, please). Please state nature of emergency:

\_\_\_\_\_

- As soon as possible, preferably within a month
- In due course, at discretion of Committee Chair
- When certain materials are made available, as noted in 7 & 8 on reverse
- Following public hearing

5. I estimate that consideration of this item will require approximately:

- One half hour or less
- More than one hour
- More than one meeting
- Up to one hour
- An entire meeting
- Extended deliberation by subcommittee

6. The following people should be notified and asked to attend deliberations on this item. (Please check those with whom you have already discussed the issue, especially relevant Department Heads):

City personnel

Citizens (include telephone numbers/email please)

Lara Kritzer \_\_\_\_\_

\_\_\_\_\_

Lisa Dady \_\_\_\_\_

\_\_\_\_\_

Josh Morse \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

7. The following background materials and/or drafts should be obtained or prepared by the Clerk's office prior to scheduling this item for discussion:

8. I  have or  intend to provide additional materials and/or undertake the following research independently prior to scheduling the item for discussion. \*

CPC Funding Recommendation and the Jackson Homestead Basement Rehabilitation Phase I Proposal and attachments

(\*Note to docketer: Please provide any additional materials beyond the foregoing to the Clerk's office by 2 p.m. on Friday before the upcoming Committee meeting when the item is scheduled to be discussed so that Councilors have a chance to review all relevant materials before a scheduled discussion.)

Please check the following:

- 9.  I would like to discuss this item with the Chairman before any decision is made on how and when to proceed.
- 10.  I would like the Clerk's office to contact me to confirm that this item has been docketed. My daytime phone number is:
- 11.  I would like the Clerk's office to notify me when the Chairman has scheduled the item for discussion.

Thank you.

Lara Kritzer  
Signature of person docketing the item

[Please retain a copy for your own records]



Ruthanne Fuller  
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](http://www.newtonma.gov)

Barney S. Heath  
Director

**Community Preservation Committee  
Funding Recommendation for the Jackson  
Homestead Basement Rehabilitation, Phase I**

**Date:** August 16, 2022  
**From:** Community Preservation Committee  
**To:** The Honorable City Council  
**CC:** Her Honor Mayor Ruthanne Fuller

**PROJECT GOALS & ELIGIBILITY**

CPA Historic Resource funding is requested to complete Phase I of the larger project to preserve, restore and rehabilitate the basement level of the ca. 1809 Jackson Homestead. This phase of work includes hiring a preservation consultant to develop plans which address the water infiltration and moisture issues which are damaging the foundation and endangering the collections stored in the basement. The ultimate goal of this project is to develop plans that address the water infiltration and humidity problems in a manner which meets the Secretary of the Interior’s Standards for the historic structure, while also addressing the need for the appropriate climate controls and systems in the space for the protection and storage of the City’s historic collections and archive materials.

The project is eligible for CPA funding for the preservation, rehabilitation and restoration of one of the City’s most significant historic resources.

**RECOMMENDED FUNDING** At its monthly meeting on Tuesday, July 12, the Community Preservation Committee unanimously recommended, with a vote of 6 to 0, that \$75,000 in Community Preservation Act funding be appropriated from the FY23 Historic Resource Reserve Fund to the control of the Planning & Development Department to complete the first phase of the Jackson Homestead Basement Restoration Project by hiring a preservation consultant to develop plans to remediate the existing water and humidity issues in order to preserve the historic structure and protect its important collections.

<b>Proposed CPA Funding Accounts for the Jackson Homestead Basement Renovation, Phase I</b>			
<b>Account Name</b>	<b>Account Number</b>	<b>Amount Currently Available</b>	<b>Proposed Amount for the JH Basement Renovation</b>
Historic Resource FY23 Reserve Account	#58R10498 57900B	\$556,588	\$75,000
<b>Total Project Funds</b>			<b>\$75,000</b>

[www.newtonma.gov/cpa](http://www.newtonma.gov/cpa)

Lara Kritzer, Community Preservation Program Manager  
[lkritzer@newtonma.gov](mailto:lkritzer@newtonma.gov) 617.796.1144



### **SPECIAL ISSUES CONSIDERED BY THE CPC**

**Community Needs:** The Jackson Homestead is one of the City's most important historic structures and the home of its historic collections and archives. The Jackson Homestead is the history institution for all of Newton and the proposal considers it to be one of the City's "special public resources" which are called out in the Community Preservation Plan as a priority for support. The building is also listed as being of High Significance in the Newton Public Buildings Survey Phase II Analysis of Historical Significance.

This project has been on the City's to-do list for several years and is listed as Priority #211 on the City's Capital Improvement Plan(CIP) for FY23-FY27. The humidity and moisture problems have been ongoing, compounded recently by ductwork that generates condensation that has dripped on artifacts and walls and has raised the need for this work to a higher level of priority.

**Historic Significance:** The ca. 1809 Jackson Homestead is highly significant as the historically and architecturally intact home of an early Newton settler. The house was occupied and maintained by the Jackson family for nearly 300 years before it was given to the City in 1949. Since that time, the City has owned and maintained the property. Today it is the home of Historic Newton and houses the City's history museum and archive facilities. The property was originally listed on the National Register in 1973 and the individual listing was updated in 2003 to reflect its history as a stop on the Underground Railroad. The Jackson Homestead is also listed on the State Register of Historic Places, protected by a preservation restriction which was placed on the property in 1997, and considered to be of "High Significance" in City historic surveys.

Additional information on the history of the Jackson Homestead is available on Historic Newton's website at <https://www.newtonma.gov/government/historic-newton/visit-museum/jackson-homestead-and-museum/history-of-the-jackson-homestead> and on the CPA project page at: <https://www.newtonma.gov/home/showpublisheddocument/39723/637341404152600000>

**Funding Uses and Sources:** The project requests CPA funding for the first phase of a multi-phase project to restore the basement of the Jackson Homestead, preserve the building and the collections it houses, and restore the basement space to meet current museum requirements. The initial funds requested will be used to hire a consultant to study the current conditions and develop the plans, designs, and budget information necessary to address them. A draft Scope of Work for the project is included with the proposal materials.

This phase of the project is proposed to be primarily funded through CPA historic resource funds with matching funds to come from Public Buildings and Historic Newton staff time. Part of the consultant's work during this phase will be to develop a construction budget for the next phase of the project. This work will be completed in coordination with the Public Buildings Department, which will also be involved in the development of the project's construction budget.

**Project Finances:** The Jackson Homestead is a City property which is operated by Historic Newton. Maintenance of the site is conducted by Historic Newton with assistance from other City Departments, including the Public Buildings and Parks, Recreation, and Culture Departments. The regular maintenance costs for the site are included in the City's annual budget and the work included in this proposal is included in the City's CIP for FY23-FY27.

**CPC Funding Recommendation for Jackson Homestead Basement  
Restoration Project, Phase I**

**Accessibility:** Historic Newton has also discussed the need to make this space and the overall building more accessible in the future. Accessibility may be added to the scope of the project in the future.

**ADDITIONAL RECOMMENDATIONS** *(funding conditions)*

1. CPA funding is limited to the hiring of consultants to assess the current condition of the Jackson Homestead’s foundation and basement space and develop plans and designs which remediate the water problems and rehabilitate the space to meet current museum standards.
2. The funding must be used within one year of the City Council’s approval of this recommendation. If this funding deadline cannot be met, the Applicants must submit a written request to extend that deadline to the CPC.
3. Any periodic reports or interim deliverables prepared as part of this project must be shared with the CPC for online posting.
4. A copy of the final report from the consultants must be submitted to the CPC for posting online.
5. Any CPA funds which are unused at the completion of Phase I of this project will be returned to the Newton Community Preservation Fund.

**KEY OUTCOMES**

The Community Preservation Committee will evaluate this project based on its success in developing a clear strategy for addressing the existing water infiltration and humidity issues which meet the Secretary of the Interior’s Stands for Rehabilitation while also meeting the climate control needs of its historic collections.

**ATTACHMENTS**

- June 2022 Proposal and selected attachments submitted to the CPC for the July 12, 2022 public hearing

Additional information not attached to this recommendation, including petitions and letters of support, are available on the CPC’s website at:

<https://www.newtonma.gov/government/planning/community-preservation-program/proposals-projects/museum/-fsiteid-1#!/>

City of Newton

Ruthanne Fuller  
Mayor

## Newton, Massachusetts Community Preservation Program FUNDING REQUEST

 PRE-PROPOSAL

 PROPOSAL

 (For staff use)  
date rec'd:

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](http://www.newtonma.gov/cpa) or contact:

Lara Kritzer, Community Preservation Program Manager

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

[lkritzer@newtonma.gov](mailto:lkritzer@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>Jackson Homestead Basement Rehabilitation</b>		
<b>Project LOCATION</b>	Full street address (with zip code), or other precise location. 527 Washington Street Newton, MA 02458		
<b>Project CONTACTS</b>	Name & title or organization	Email	Phone
<b>Project Manager</b>	Lisa Dady, Director, Jackson Homestead, Historic Newton	<a href="mailto:ldady@newtonma.gov">ldady@newtonma.gov</a>	617-796-1451
<b>Other Contacts</b>	Josh Morse, Commissioner of Public Buildings, City of Newton	<a href="mailto:jmorse@newtonma.gov">jmorse@newtonma.gov</a>	617-796-1608
<b>Project FUNDING</b>	A. CPA funds requested: \$1,000,000	B. Other funds to be used: \$44,107	C. Total project cost (A+B): \$1,044,107
<b>Project SUMMARY</b>	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>The intent of this project is to stabilize and rehabilitate the basement of the Jackson Homestead, a Newton historical treasure. The end-goal is to achieve a space that is safe for artifacts, enjoyable for visitors, and structurally sound in support of the building for generations to come.</p> <p>The basement needs to be renovated to eliminate or control water infiltration in order to stabilize and protect the structure. The gallery is obsolete and requires redesign and renewal to meet contemporary standards of collection preservation, museum display, and public engagement.</p> <p>The space is inadequately conditioned resulting in wide swings in relative humidity during winter and summer seasons. The museum has closed the basement to the public as it works to remove the City's collections from the space to avoid continuing damage. The lack of public access and the high-humidity and moisture damage to the artifacts put our national accreditation at risk. Jackson Homestead serves as the history institution for the entire city and its exhibits and programming draw thousands of people from the region. It is not only important to have a well-kept appearance for the public but also, we must make this area safe and pleasant for visitors.</p> <p>Jackson Homestead is truly an Historic Landmark, but with a deteriorating foundation it is at great risk. Community Preservation Act funds are critical for the preservation of the entire building through its foundational structures.</p> <p><i>See attached narrative regarding the existing conditions, project organization, and scope of construction.</i></p>			

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>Jackson Homestead</b>	
<b>USE of CPA FUNDS</b>		<b>HISTORIC RESOURCES</b>	
<b>CHECK ALL THAT APPLY</b>	Preserve	X	
	Rehabilitate/ Restore	X	
<b>COMMUNITY NEEDS</b>	<p>From each of at least 2 plans linked to the <u>Guidelines &amp; Forms</u> page of <a href="http://www.newtonma.gov/cpa">www.newtonma.gov/cpa</a>, 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>The CPA plan calls out "special public resources and public-private partnerships: publicly or privately owned assets that benefit all Newton residents &amp; neighborhoods," as a priority. As <i>the</i> history institution for all of Newton this site is a special public resource.</p> <p><i>Capital Improvement Plan (CIP)</i> – Requires that projects on City-owned sites, or that involve work by City staff, must be sponsored by the appropriate City department. In this case the project is sponsored by the City department of Historic Newton.</p> <p>The NEWTON PUBLIC BUILDINGS SURVEY PHASE II – ANALYSIS OF HISTORICAL SIGNIFICANCE lists Jackson Homestead with a Level of Significance of High. [Individually listed building on the National Register of Historic Places, 1973 ... Preservation Phase II: Analysis of Historically Significant City Buildings, Newton, Massachusetts Jackson Homestead DRAFT 2/17/2012 PART 1 – Analysis].</p> <p>This project has been on the City's to-do list for several years. The humidity and moisture problems have been ongoing, compounded recently by ductwork that has generated condensation that dripped on artifacts and walls. Thus, this project has a high level of priority.</p>		
<b>COMMUNITY CONTACTS</b>	<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>		
<b>Name &amp; title or organization</b>		<b>Email</b>	<b>Phone</b>
Josh Morse Commissioner of Public Buildings City of Newton		<a href="mailto:jmorse@newtonma.gov">jmorse@newtonma.gov</a>	617-796-1608 52 Elliot St. Newton MA 02461
Russel Feldman, AIA, NCARB Principal Emeritus TBA Architects, Inc.		<a href="mailto:RFeldman@tbaarchitects.com">RFeldman@tbaarchitects.com</a>	617 429-5033 9 Damonmill Square, Suite 5C Concord, MA 01742
Lawrence Bauer, AIA Schwartz / Silver Architects		<a href="mailto:lbauer@sbgarch.com">lbauer@sbgarch.com</a>	617-542-6650 x240 75 Kneeland Street Boston, MA 02111



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.

<b>Project TITLE</b>	<b>Jackson Homestead Basement Rehabilitation</b>	
<b>SUMMARY CAPITAL/DEVELOPMENT BUDGET</b>		
<b>Uses of Funds</b>		
Design & Engineering (17% of construction cost)		\$145,300
Construction		\$854,700
Public Buildings project management		\$33,070
Jackson Homestead / Historic Newton project management		\$11,037
<b>D. TOTAL USES (should equal C. on page 1 and E. below)</b>		<b>\$1,044,107</b>
<b>Sources of Funds</b>	<b>Status</b> (requested, expected, confirmed)	
CPA funding	Requested	\$1,000,000
In-kind salaries: Josh Morse and other Public Buildings staff	Confirmed	\$33,070
In-kind salaries: Lisa Dady (assisted by pro-bono expertise from Historic Newton's Buildings & Grounds Committee)	Confirmed	\$11,037
<b>E. TOTAL SOURCES (should equal C. on page 1 and D. above)</b>		<b>\$1,044,107</b>
<b>SUMMARY ANNUAL OPERATIONS &amp; MAINTENANCE BUDGET (cannot use CPA funds)</b>		
<b>Uses of Funds</b>		
		\${amount}
		\${amount}
		\${amount}
		\${amount}
<b>F. TOTAL ANNUAL COST (should equal G. below)</b>		<b>\${amount}</b>
<b>Sources of Funds</b>		
		\${amount}
		\${amount}
<b>G. TOTAL ANNUAL FUNDING (should equal F. above)</b>		<b>\${amount}</b>
<b>Project TIMELINE</b>	<b>Phase or Task</b>	<b>Season &amp; Year</b>
See Attachment		



Project TITLE			
↓ Check off submitted attachments here.			
REQUIRED.	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)
Pre-proposals: separate attachments not required, just use page 3 of form.  Full proposals: separate, detailed budget attachments REQUIRED.	<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>Maintenance budget, projected separately for each of the next 10 years</b> (CPA funds may not be used for operations or maintenance)	
		<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> briefly summarize sponsor's understanding of applicable state statutes and City policies	
Pre-proposals: recommended. Full proposals: REQUIRED.	X	<b>HISTORIC SIGNIFICANCE</b>	<b>ATTACHMENT 1:</b> Analysis of Historical Significance (narrative; maximum 1 page)
			<b>ATTACHMENT 2:</b> Description of Historically Significant Features (maximum 1 page)
			<b>ATTACHMENT 3.</b> Summary & Justification of Proposed Treatment (maximum 1 page)
			<b>ATTACHMENT 4.</b> Newton Historical Commission Review (based on attachments 1-3 above)
REQUIRED for all full proposals.	<b>SPONSOR FINANCES &amp; QUALIFICATIONS, INSTITUTIONAL SUPPORT</b>		
		<b>For sponsoring 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	
	<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	
		<b>Environmental mitigation plans (if applicable):</b> incl. lead paint, asbestos, etc. (including disposal of existing fence elements that cannot be repaired or restored)	
OPTIONAL for all proposals.		<b>LETTERS of SUPPORT</b>	from Newton residents, organizations, or businesses

The intent of this project is to stabilize and rehabilitate the basement of the Jackson Homestead, a Newton historical treasure. The end-goal is to achieve a space that is safe for artifacts, enjoyable for visitors, and structurally sound in support of the building for generations to come.

### **Existing Conditions**

The existing space is used for whole building heating, air conditioning and ventilation (HVAC), electrical service, water service, main sprinkler system supply piping and valves, and a small non accessible bathroom. Most of its area is used for museum gallery space, created in the 1980's.

The below-grade space is relatively high-ceilinged and has fieldstone walls, brick structural piers and an unsealed concrete slab on grade. There is a compliant accessible entrance along the north wall. The basement space suffers from water infiltration through the foundation walls and floor. The brick structural piers show damage from creeping damp due to the infiltration. Water infiltration is also damaging the stone mortar, as well as the wood windows and frames.

The space is inadequately conditioned resulting in wide swings in relative humidity during winter and summer seasons. The Museum has closed the basement to the public as it works to remove the City's collections from the space to avoid continuing damage.

The basement needs to be renovated to eliminate or control water infiltration in order to stabilize and protect the structure. The gallery is obsolete and requires redesign and renewal to meet contemporary standards of collection preservation, museum display, and public engagement.

### **Project Organization**

We propose to complete the project through two design and engineering contracts. The first contract, commissioned by the City and supported largely by the City's CPC funds, will provide detailed analysis of the existing conditions and result in structural repairs and stabilization, new interior structure and wall, floor and ceiling finishes, lighting, power and HVAC. The second contract, commissioned by the non-profit Newton Historical Society, will include gallery interior and exhibit design and installation. The redesign will also result in a small storage space to replace to replace three awkward, damp, and underutilized closets as well as allow for collection storage in exhibit furniture and elsewhere. The two design contracts will be roughly concurrent and coordinated by Public Buildings and Jackson

Homestead staff, Historic Newton's Buildings and Grounds Committee, and supported by members of the Historic Newton community.

### **Scope of Construction**

Although the final design approach has yet to be determined, our current expectation is that most of the construction work will be largely on the building interior. The fieldstone walls and floor will be sealed on the interior by a continuous membrane. New wall and floor framing, and interior wall surfaces and flooring will create a sealed interior gallery space as well as enclosures for the various utilities. Access stairs from the main floor of the Museum will be modified as required to adjust for the new floor level. We will also install new sealed windows and properly flashed frames.

The space between the new membrane and the interior face of the fieldstone walls and concrete floor will be configured to actively drain away any water that infiltrates the structure. Related site work will include modification of window wells to assure proper drainage and examination of the condition of previous infiltration efforts. Existing catch basins will be inspected, cleaned, and repaired if necessary.

The building's overall HVAC system will be assessed, upgraded or an additional unit installed to achieve museum-quality climate control. Additional capacity will be designed in light of the City's "green" goals, including increased efficiency and reduction of fossil fuel consumption. New ceilings and gallery lighting will be coordinated with the gallery design. While not a part of the Community Preservation Act funding, the new Newton history exhibit will replace a sorely outdated (both in content and design) display with a more engaging presentation of artifacts, audiovisual media, and other interactives; ultimately being a history experience that will make this community proud.

Jackson Homestead is truly an Historic Landmark, but with a deteriorating foundation it is at great risk. Community Preservation Act funds are critical for the preservation of the entire building through its foundational structures.

Project

**Historic Newton - Jackson Homestead Basement Rehabilitation**

TITLE

275 Washington Street, Newton, MA 02458

**Supplemental Attachments for HISTORIC RESOURCES PROPOSALS**

26 March 2022

**1. Analysis of Historical Significance (narrative; min. 1 paragraph - max. 1 page)**

Jackson Homestead, built in 1809, is a National Register of Historic Places property Its significance is well described in the National Register nomination form:

"The Jackson Homestead is significant as an example of a property acquired by an early Newton settler, and occupied and maintained by his descendants for nearly 300 years.

Edward Jackson (1602-1681) was the fourth settler in Cambridge Village, now called Newton. He built a salt box house on the Homestead property in 1670 for his son, Sebas, and owned about 1600 acres at his death. An Indian trail crossed his land. He was "constantly present with the Rev. John Eliot at his lectures to the Indians, taking notes and answering questions". He owned two menservants and was probably the first slave owner in Newton. Forty-four of his Newton descendants were in the Revolutionary army.

Major Timothy Jackson (1756-1814) built the present house in 1809, using boards, hand-hewn beams and bricks from the old house where possible. He joined the Militia when 15 years old and became a Corporal two years later. While serving in the Revolution, he spent three years on the high seas aboard privateers and other war vessels, was captured several times and escaped after suffering severe hardships, including seven months in a British Army prison in New York. He settled down to farming in Newton at the age of 24. Later, he became a successful candle and soap manufacturer \* and was able to leave a fine estate to his children. His civic activities included such positions as school teacher, member of the School Board, Selectman for six years. Moderator at town meetings. Justice of the Peace, and Deputy Sheriff.

William Jackson (1783-1855) was Timothy's son. In 1806 he married Hannah Woodward of Newton, who died in 1814 leaving five children. William later married Mary Bennett, moving to the Homestead in 1820. There were 14 children when Mr. Whipple of Boston took a remarkable Daguerreotype of the entire family in 1846. William's impressive public career included the following: Head of Temperance Society, first member and Deacon of Eliot Church, member of the 22nd and 23rd Congress, General Agent for the Boston and Worcester Railroad, member of the Newton School Board, President of the j Newton National Bank, owner of the soap and candle factory already established on this property, member of a real estate board dedicated to the development of Auburndale in 1848, member of the Liberal Party, and an Abolitionist who made his house an Underground Station for runaway slaves."

During the history of the Jackson Homestead, at least twelve brides were married in the parlour, and the dining room held as many as forty-two at Thanksgiving dinner. Bunk beds lined the wall of the first-floor nursery where the young Jacksons slept.

Jackson relatives lived here until about 1930. In 1949, a ninth-generation descendant gave the Homestead to the City of Newton. The furnishings represent those of a house of the early 1800's, including many things that belonged to the Jackson family. The house is relatively unchanged and is a good example of hip roofed Federal style with its original outbuildings. The Homestead is now used as a museum, where lectures are given and tours conducted as part of an active educational program.

## **2. Description of Historically Significant Features (keyed to attachment 1; max. 1 page)**

Also from the National Register nomination form:

"The Jackson Homestead, on the corner of Washington Street and Jackson Road, has wide lawns on the front (south) and west sides, with about one half acre of fields to the rear (north); one-story outbuildings extend to the east. Large trees surround the house. In front the property is bounded by an elaborate wooden fence which is terminated at both ends by paneled square posts topped with urns; posts of the same design mark the center entrance. On Jackson Road the land is enclosed by a simple picket fence.

The 1809 house was built on a foundation of granite blocks brought from Quincy by oxcart. Inside are six fireplaces with hand carved mantel and a kitchen fireplace and oven used for cooking; hand-hewn beams, bricks and boards from the 1670 house; a 300-year-old well in the first floor laundry room; [and] the original front door..."

These features remain today.

## **3. Summary & Justification of Proposed Treatment (keyed to attachment 2; max. 1 page)**

To be submitted with full proposal.

## **4. Newton Historical Commission confirmation of local historic significance, if the resource is not already on the National register of Historic Places.**

N/A. The resource is on the National Register of Historic Places.

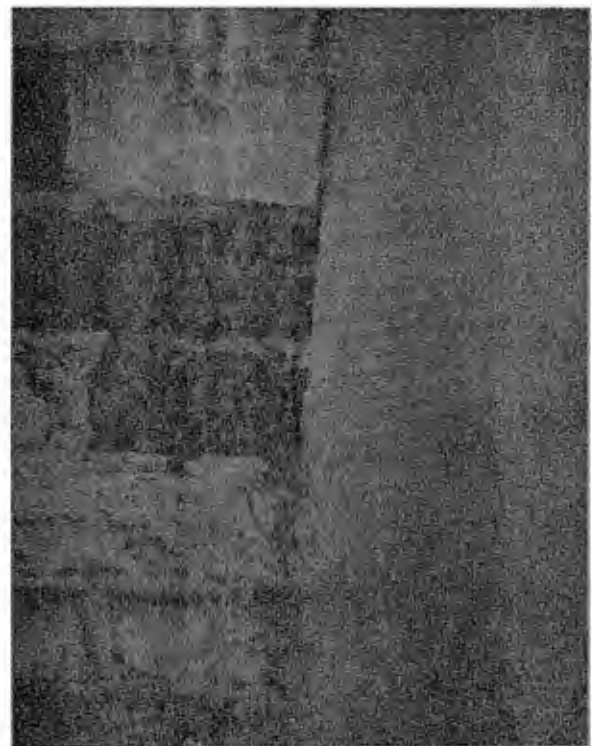
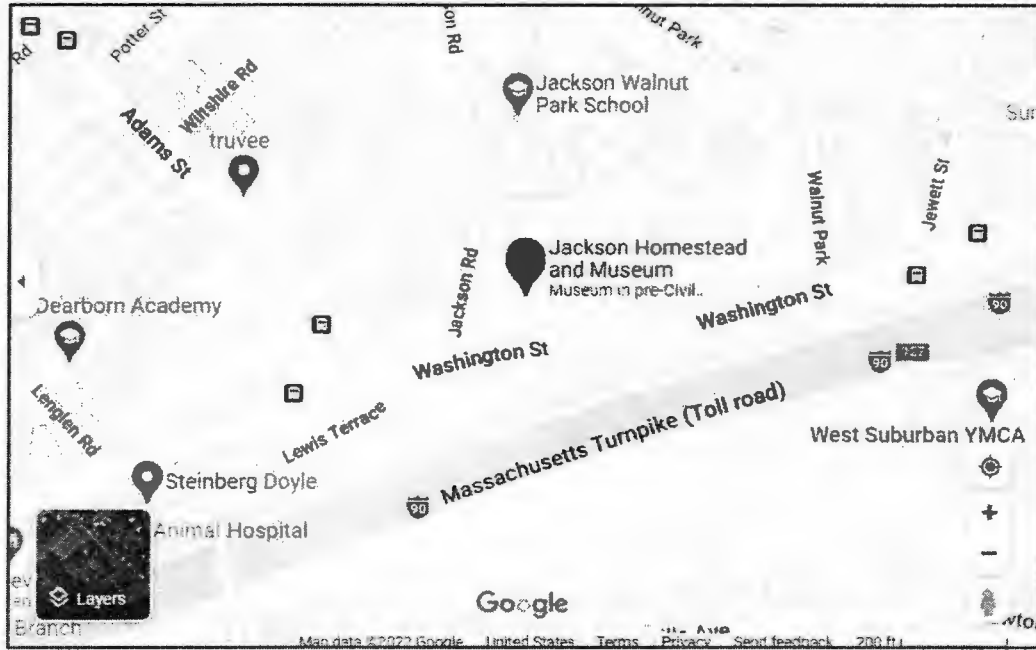
**Project****Historic Newton - Jackson Homestead Basement Rehabilitation****TITLE**

275 Washington Street, Newton, MA 02458

**Attachment - Timeline**

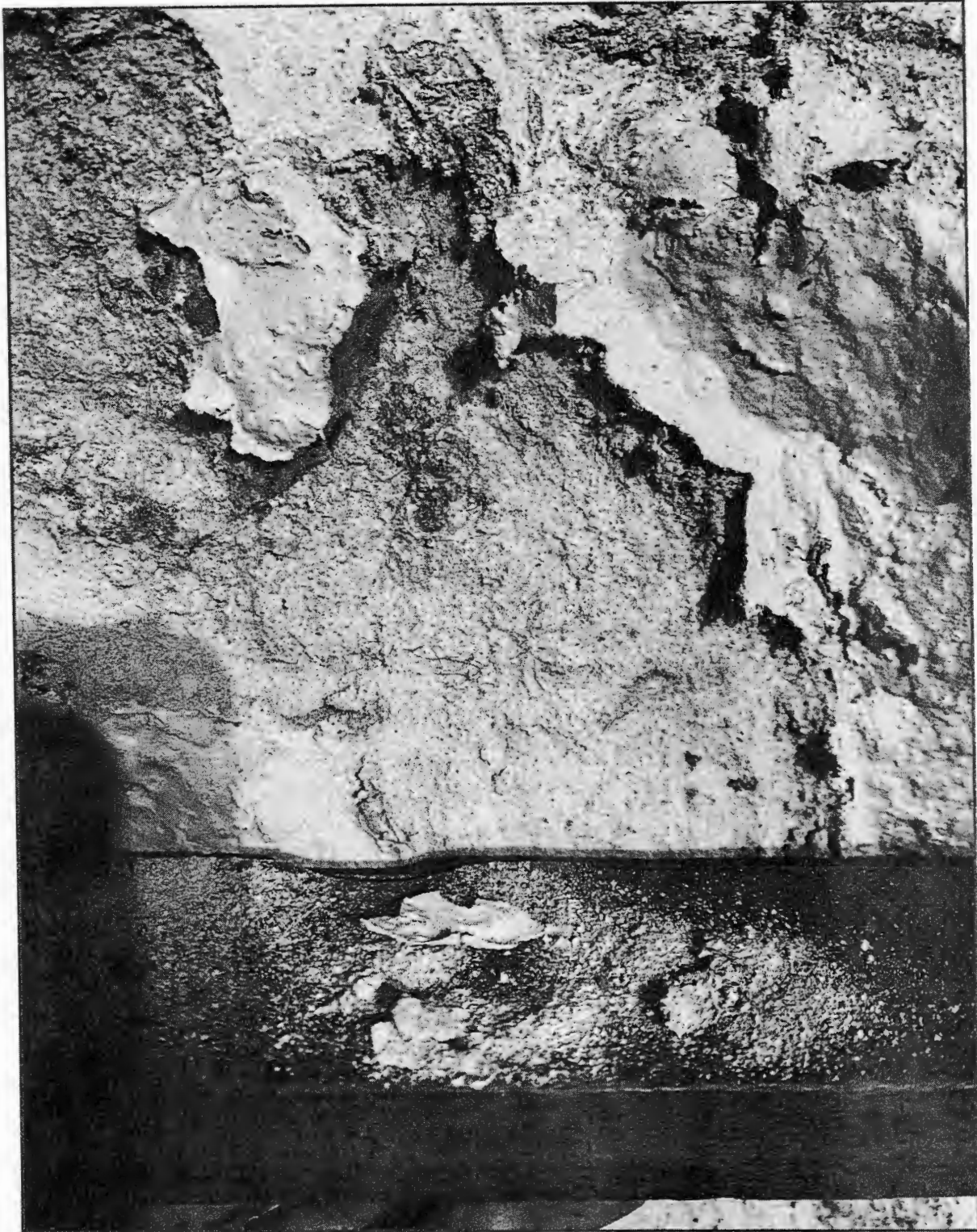
<u>Activity</u>	<u>Months</u>	
Preapplication Approval, Design & Engineering	1	
Application, Design & Engineering	3	
Application Approval, Award of Funds	2	
Contract Design Solicitation (including RFQ preparation)	4	
Contract Award, Signed	1	
Preliminary Design & Engineering	5	
CPC Application, Construction	2	
CPC Approval, Award of Funds, Construction	1	
Construction Contract Solicitation	3	
Construction Contract Award	1	
Mobilization	1	
Construction Phase	8	
Substantial Completion	10	months from date of award
Gallery Installation	3	
Occupancy	14	months from start of construction
<b>Total Project Timeline, from start to finish:</b>	<b>37</b>	<b>months</b>

<b>Project</b>	<b>Historic Newton - Jackson Homestead Basement Rehabilitation</b>
<b>TITLE</b>	275 Washington Street, Newton, MA 02458

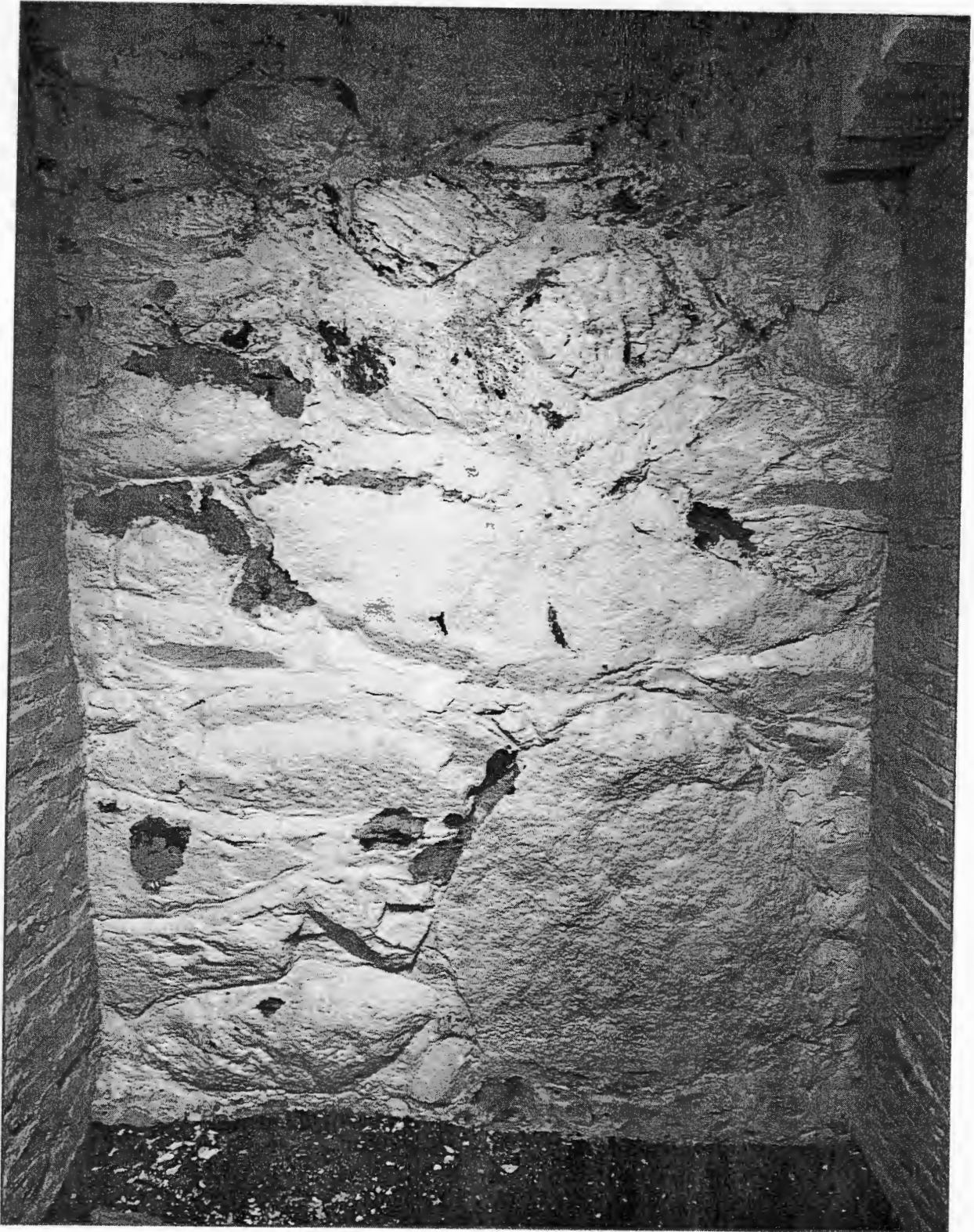


**Foundation wall NE closet**





**Fieldstone foundation wall, west. Mortar is crumbling and during rainy weather it is thoroughly wet (muddy).**

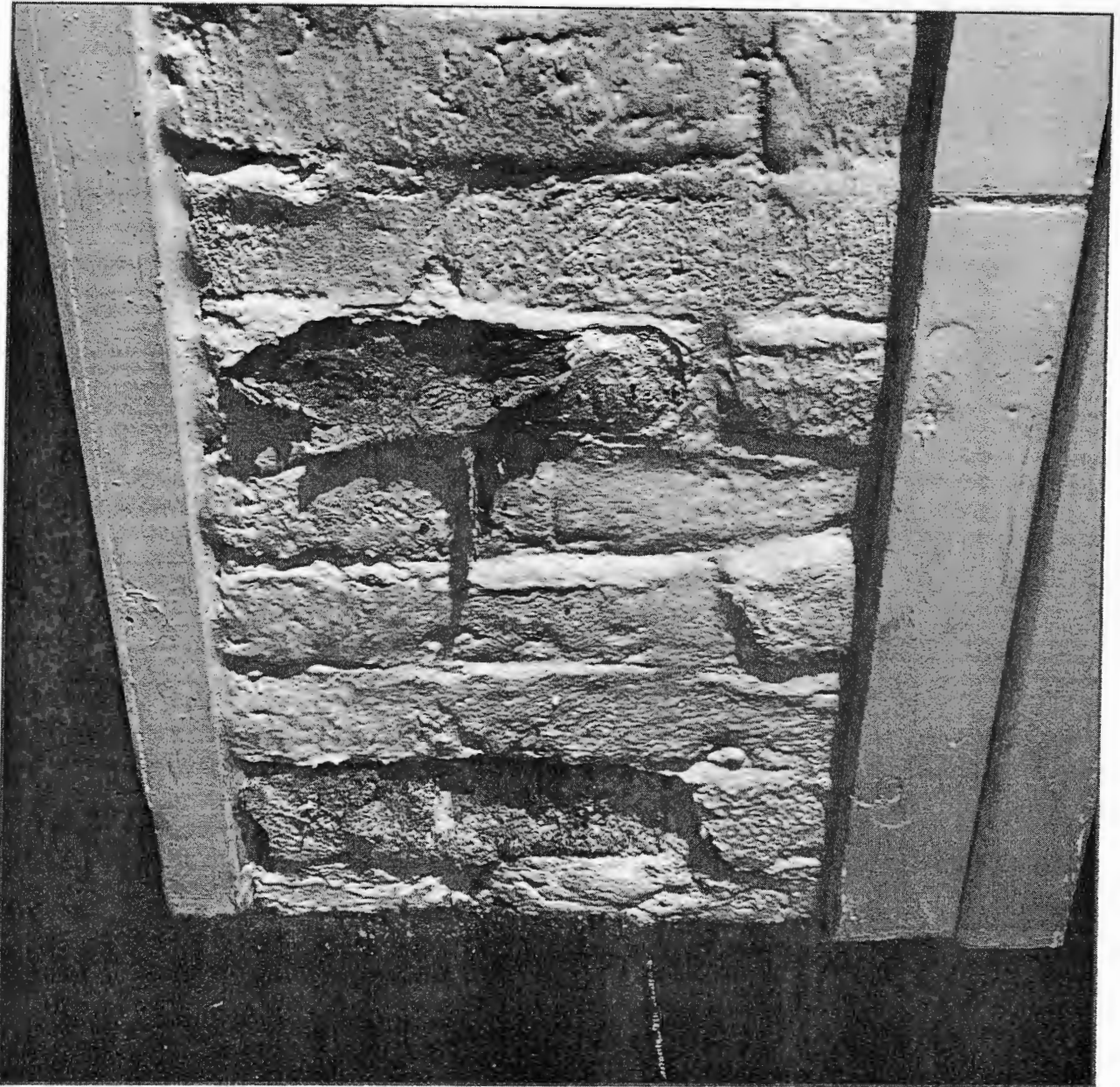


Fieldstone foundation wall, west.



Foundation wall south





Foundation wall northwest

# DRAFT consulting scope for Jackson Homestead Basement Rehabilitation Project

## Phase 1: Feasibility Study

### Qualifications

The prime consultant is to be experienced in the preservation of historic structures including wood-frame structures similar to the Jackson Homestead. The consultant team must be experienced in design and construction of museum spaces in buildings similar to the Jackson Homestead and able to propose high-performance mechanical solutions with estimates of associated temperature and humidity ranges that can be achieved in light of the proposed renovations.

### Project Organization

The City of Newton will administer this contract through the Public Buildings Department (PBD), as managed by their project manager. The operating agency is the Historic Newton Department which operates the Museum and is directed by the Director. The Director will create a Review Committee of museum staff and members of the Joint Board of Historic Newton, along with PBD's Project Manager, which will provide information and review materials submitted by the Consultant. In addition, the Director, on behalf of the Owner's Review Committee, will commission a museum designer to develop a program and performance specifications for the exhibit on Newton History that will be housed in the proposed gallery.

### Consultant Scope of Work

Task 1: Review of existing material, both historical information on the structure and information gathered as part of renovations and repair. Material to include:

1. HABS drawings of site, building plans, elevations and details, 1935
2. Photographs and drawings of the building and grounds
3. Plans and specifications of renovation of the building exterior performed by the city including:
  - a. Exterior and foundation prepared by TBA Architects, Inc., 1997
  - b. Renovation of the Jackson Room prepared by TBA Architects, Inc., **date**
  - c. Renovation of archive and access and safety system improvements to exterior prepared by Durkee, Brown, Viveiros & Werenfels Architects (D,B,V&W), 2011
  - d. HVAC repair and equipment most-recent replacement prepared by PBD's Contractor
  - e. Exterior envelope repair and repainting prepared by PBD, **date**
  - f. Record of relevant work orders performed recently

4. Prior master plans for JH reconfiguration and expansion
  - a. Space Needs Program Study for the Newton History Museum, prepared by Solomon+Bauer Architects, Inc., 2005
  - b. Long Range Plans for Maintenance and Operations of the Durant-Kenrick House and Jackson Homestead, 2017
  - c. Schematic studies by D,B,V&W, , date
5. Update/confirmation of existing conditions documents to assure that recommendations are based on the installed and dimensionally accurate conditions.

Task 2: Review of proposed program: work is to be coordinated with the consultant and Owner's Review Committee.

1. Building Stabilization
  - a. The building shows evidence of water infiltration from the fieldstone foundation walls and rising damp from below the existing concrete slab on grade, resulting in deterioration of the foundation wall, and of wood windows, frames and sills of the structure above. Brick walls and piers are deteriorating with spalling and crumbling due to rising damp. This has required exhibit materials be relocated to the main level, severely restricting the museum use of the lower level. Additionally, high humidity levels are migrating to the building above, damaging wood structural elements and compromising the museum's ability to properly store and preserve its collections.
  - b. Consultant is to recommend building system solutions to control water infiltration to the structure and building interior.
2. Exhibit Space
  - a. House a new exhibit on Newton history. Work will be coordinated with HN staff and an independent exhibit design consultant commissioned by the Newton Historical Society.
  - b. A goal of this aspect of the study is to maximize exhibit area and configure it to maintain flexibility. Reconfiguring existing utilities and service spaces can be considered.
  - c. Temperature and humidity control are critical components of the study. We recognize that the area under consideration is largely below grade with a fieldstone foundation and wood structure above. Alternative scopes of construction are to be considered in light of estimated temperature and humidity ranges that can be achieved.
3. Accessibility
  - a. Currently, the lower level is accessed from the back through a separate entrance, requiring either separate (street) parking or long walkway access. Main level access is provided by a ramp to the main entrance and reception. The building's upper level is currently not accessible.

- b. Explore options for providing access between two or three building levels. Options to consider include an interior lift, or a new lift constructed outside the historic building envelope. Reconfiguration of the existing lower-level stair access may be considered.
- 4. Storage
  - a. Identify areas for storage. Storage is to be configured for efficiency and flexibility. Consultant will identify the estimated range of temperature and humidity control for each proposed alternative.
- 5. Restroom
  - a. An existing, noncompliant restroom exists in the lower level (with a compliant restroom on the main floor). Consultant to consider building-wide compliance to determine whether this is required in the lower level.
- 6. Mechanical and Service
  - a. Currently, an existing mechanical closet houses a gas-fired boiler (installed **date**). Other utilities in the basement include an electrical panel, sprinkler valves and controls, and \_\_\_\_\_. Consultant to review existing systems and identify opportunities for higher performance to meet or advance the museum's goals for temperature and humidity control.

Task 3: Concept Plans and Outline Specifications: Consultant team is to provide draft conceptual plans and specifications and details sufficient to establish the parameters of a solution for final design and engineering.

1. Draft recommendations to include estimated costs for final design services and construction, with recommended spending priorities.
2. Meetings to discuss recommendations.
3. Revisions as required.
4. Final Report.

#### Schedule

Work on the feasibility study will commence immediately on award with progress milestones as follows:

Month	Scope	Deliverable
1	Contract Award	
2	Task 1	Confirmation Memo
3	Task 2	Draft Program Submitted
5	Task 3	Draft Plans and Cost Estimates
6		Final Report



## Preapplication text on the project

The intent of this project is to stabilize and rehabilitate the basement of the Jackson Homestead, a Newton historical treasure. The end-goal is to achieve a space that is safe for artifacts, enjoyable for visitors, and structurally sound in support of the building for generations to come.

### Existing Conditions

The existing space is used for whole building heating, air conditioning and ventilation (HVAC), electrical service, water service, main sprinkler system supply piping and valves, and a small non-accessible bathroom. Most of its area is used for museum gallery space, created in the 1980's. The below-grade space is relatively high-ceilinged and has fieldstone walls, brick structural piers and an unsealed concrete slab on grade. There is a compliant accessible entrance (but arguably sub-standard entrance from a Universal Design perspective) along the north wall. The basement space suffers from water infiltration through the foundation walls and floor. The brick structural piers show damage from creeping damp due to the infiltration. Water infiltration is also damaging the stone mortar, as well as the wood windows and frames. The space is inadequately conditioned resulting in wide swings in relative humidity during winter and summer seasons. The Museum has closed the basement to the public as it works to remove the City's collections from the space to avoid continuing damage. The basement needs to be renovated to eliminate or control water infiltration in order to stabilize and protect the structure. The gallery is obsolete and requires redesign and renewal to meet contemporary standards of collection preservation, museum display, and public engagement.

### Project Organization

We propose to complete the project through two design and engineering contracts. The first contract, commissioned by the City and supported largely by the City's CPC funds, will provide detailed analysis of the existing conditions and result in structural repairs and stabilization, new interior structure and wall, floor and ceiling finishes, lighting, power and HVAC. The second contract, commissioned by the non-profit Newton Historical Society (NHS), will include gallery interior and exhibit design and installation. The redesign will also result in a small storage space to replace to replace three awkward, damp, and underutilized closets as well as allow for collection storage in exhibit furniture and elsewhere. The two design contracts will overlap in schedule and be coordinated by Public Buildings and Jackson Homestead staff, Historic Newton's Buildings and Grounds Committee, and supported by members of the Historic Newton community.

### Scope of Construction

Although the final design approach has yet to be determined, our current expectation is that most of the construction work will be largely on the building interior. The fieldstone walls

and floor will be sealed on the interior by a continuous membrane. New wall and floor framing, and interior wall surfaces and flooring will create a sealed interior gallery space as well as enclosures for the various utilities. Access stairs from the main floor of the Museum will be modified as required to adjust for the new floor level. We will also install new sealed windows and properly flashed frames. The space between the new membrane and the interior face of the fieldstone walls and concrete floor will be configured to actively drain away any water that infiltrates the structure. Related site work will include modification of window wells to assure proper drainage and examination of the condition of previous infiltration efforts. Existing catch basins will be inspected, cleaned, and repaired if necessary. The building's overall HVAC system will be assessed, upgraded or an additional unit installed to achieve museum-quality climate control. Additional capacity will be designed with regard to the City's "green" goals, including increased efficiency and reduction of fossil fuel consumption. New ceilings and gallery lighting will be coordinated with the gallery design.

Jackson Homestead is truly an Historic Landmark, but with a deteriorating foundation it is at great risk. The main Newton history exhibit is sorely outdated (both in content and design). However, when this project is finalized, the entire building will be preserved through its foundational structures and new climate control, and the public will be served by an exhibit with more modern, diverse, and engaging presentations, for years to come.



**Ruthanne Fuller**  
Mayor

## PUBLIC BUILDINGS DEPARTMENT

Joshua R. Morse, Commissioner  
Telephone (617) 796-1600  
FAX (617) 796-1601  
TTY: (617) 796-1089  
52 ELLIOT STREET  
NEWTON HIGHLANDS, MA 02461-1605

I understand there were some questions from the City Council with respect to the Jackson Homestead Basement Waterproofing and Improvement Project. This letter is intended to clarify the general project scope and provide some context for the rough project budget estimate.

The \$75,000 design funding request will help confirm the approach to the waterproofing, but it will also further define, and refine, the project scope for general improvements to the basement level of the Jackson Homestead.

In general, the basement waterproofing is a means to an end. Once the basement is waterproofed and water and moisture infiltration is stopped, the goal is to have a museum-level climate control system installed. The current forced air handling unit is gas-fired and serves the basement and the rest of the house. I am assuming that we will want to electrify and replace this unit with a heat pump that can both heat, cool, and dehumidify the basement and the rest of the house. This will likely require rebuilding the current very small mechanical room. Once the basement is waterproofed and humidity controlled, the desire as I understood it was to make upgrades to the finishes and systems within the basement. This includes the floors, walls, and ceiling finishes. Electrical and lighting improvements will be required. The current basement restroom is inaccessible, and I assumed this would need to be corrected, so new water, sewer, fixtures, finishes, framing, walls, ceilings, and exhaust would be needed. Displays, display cases, and layout would likely all be modified. I assumed that to make these changes, we would likely need to adjust and rework systems such as fire protection, security, fire alarm, and data. I also assumed that to complete this work we would need to professionally move and store the museum materials in the basement while the space is under construction.

The \$1M budget works out to \$666/sf. Renovation projects are almost always more expensive per square foot than new construction. At \$666/sf, I'm not assuming a full gut renovation of the basement, but rather about half that scope. Based on the current and projected market, a full gut reno of the basement would be closer to \$2,000/sf escalated out to ~2025. For reference, The Durant Kenrick project cost was \$4,915,911, the house is 4,164sf, which yielded a \$1,180/sf cost in 2012, which would be \$1,809/sf in 2022 when adjusted for escalation.

The design money in this case will help refine the project scope for the waterproofing, climate control, and interior renovations.

Regards,

Josh Morse

CITY OF NEWTON

IN CITY COUNCIL

DRAFT

ORDERED:

That, in accordance with the recommendation of the Community Preservation Committee through its Chair, Jennifer Molinsky , the Public Facilities Committee through its Chair Alison Leary and the Finance Committee through its Chair Rebecca Walker Grossman, appropriation of seventy five thousand dollars (\$75,000) in Community Preservation Act funding from the FY23 Historic Resource Reserve Fund to the control of the Planning & Development Department to complete the first phase of the Jackson Homestead Basement Restoration Project by hiring a preservation consultant to develop plans to remediate the existing water and humidity issues in order to preserve the historic structure and protect its important collections be and is hereby approved as follows:

FROM:	CPA Historic Budgeted Reserve (58B10498-57900B) .....	\$75,000
	Jackson Homestead Basement Renovation Phase 1 (58B11417-530100) .....	\$75,000

Under Suspension of Rules  
Readings Waived and Approved  
DRAFT

(SGD) NADIA H KHAN

Acting City Clerk

(SGD) RUTHANNE FULLER

Mayor

Date: \_\_\_\_\_

CITY OF NEWTON

DOCKET REQUEST FORM

**DEADLINE NOTICE: Council Rules require items to be docketed with the Clerk of the Council NO LATER THAN 7:45 P.M. ON THE MONDAY PRIOR TO A FULL COUNCIL MEETING.**

To: Clerk of the City Council

Date: August 24, 2022

From (Docketer): Lara Kritzer, Community Preservation Program Manager

Address: Planning Department, Newton City Hall, 1000 Commonwealth Avenue Newton MA 02459

Phone: 617-796-1144

E-mail: lkritzer@newtonma.gov

Additional sponsors: Community Preservation Committee

1. Please docket the following item (it will be edited for length if necessary):

Recommendation from the Community Preservation Committee that \$1,948,056 in Community Preservation Act funding, which represents 35% of the Community Preservation Program’s FY23 annual funds, be appropriated, with \$556,588 to come from the FY23 Community Housing Reserve Account and \$1,391,468 to come from FY23 Unrestricted Funding Account, to the control of the Planning & Development Department to provide funding to the Newton Affordable Housing Trust for future projects that meet one or more of the CPA’s eligible funding categories for Community Housing projects.

2. The purpose and intended outcome of this item is:

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Fact-finding & discussion          | <input type="checkbox"/> Ordinance change         |
| <input checked="" type="checkbox"/> Appropriation, transfer,           | <input type="checkbox"/> Resolution               |
| <input checked="" type="checkbox"/> Expenditure, or bond authorization | <input type="checkbox"/> License or renewal       |
| <input type="checkbox"/> Special permit, site plan approval,           | <input type="checkbox"/> Appointment confirmation |
| <input type="checkbox"/> Zone change (public hearing required)         | <input type="checkbox"/> Other: _____             |

3. I recommend that this item be assigned to the following committees:

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Programs & Services          | <input checked="" type="checkbox"/> Finance | <input type="checkbox"/> Real Property     |
| <input checked="" type="checkbox"/> Zoning & Planning | <input type="checkbox"/> Public Safety      | <input type="checkbox"/> Special Committee |
| <input type="checkbox"/> Public Facilities            | <input type="checkbox"/> Land Use           | <input type="checkbox"/> No Opinion        |

4. This item should be taken up in committee:

Immediately (Emergency only, please). Please state nature of emergency:

- As soon as possible, preferably within a month
- In due course, at discretion of Committee Chair
- When certain materials are made available, as noted in 7 & 8 on reverse
- Following public hearing

5. I estimate that consideration of this item will require approximately:

- One half hour or less
- More than one hour
- More than one meeting
- Up to one hour
- An entire meeting
- Extended deliberation by subcommittee

6. The following people should be notified and asked to attend deliberations on this item. (Please check those with whom you have already discussed the issue, especially relevant Department Heads):

City personnel

Citizens (include telephone numbers/email please)

Lara Kritzer

Ann Houston - ahouston.houston@gmail.com

Barney Heath

Peter Sargent - peterbsargent68@gmail.com

Amanda Berman

\_\_\_\_\_

Eamon Bencivengo

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

7. The following background materials and/or drafts should be obtained or prepared by the Clerk's office prior to scheduling this item for discussion:

8. I  have or  intend to provide additional materials and/or undertake the following research independently prior to scheduling the item for discussion. \*

CPC Funding Recommendation and the Newton Affordable Housing Trust Proposal

(\*Note to docketer: Please provide any additional materials beyond the foregoing to the Clerk's office by 2 p.m. on Friday before the upcoming Committee meeting when the item is scheduled to be discussed so that Councilors have a chance to review all relevant materials before a scheduled discussion.)

Please check the following:

- 9.  I would like to discuss this item with the Chairman before any decision is made on how and when to proceed.
- 10.  I would like the Clerk's office to contact me to confirm that this item has been docketed. My daytime phone number is:
- 11.  I would like the Clerk's office to notify me when the Chairman has scheduled the item for discussion.

Thank you.

Lara Kritzer  
Signature of person docketing the item

[Please retain a copy for your own records]





Ruthanne Fuller  
Mayor

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

**436-22**  
Telephone  
(617) 796-1120  
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(617) 796-1142  
TDD/TTY  
(617) 796-1089  
www.newtonma.gov

Barney S. Heath  
Director

## Community Preservation Committee Funding Recommendation for the Newton Affordable Housing Trust Fund

**Date:** August 19, 2022  
**From:** Community Preservation Committee  
**To:** The Honorable City Council  
**CC:** Her Honor Mayor Ruthanne Fuller

### PROJECT GOALS & ELIGIBILITY

CPA Community Housing funding is requested to provide the initial funding for the newly established Newton Affordable Housing Trust (NAHT). The Trust was created in December 2021 to provide a more efficient and streamlined process for funding new affordable housing projects in Newton. This funding will be used by the Trust to fund future affordable housing projects which acquire, create, preserve, restore, rehabilitate or support affordable housing in Newton.

The project is eligible for CPA funding as the funds will be used in the future for CPA eligible projects which further the City's existing and future affordable housing goals.

**RECOMMENDED FUNDING** At its monthly meeting on Tuesday, August 9, the Community Preservation Committee unanimously recommended, with a vote of 9 to 0, that \$1,948,056, which represents 35% of the Community Preservation Program's FY23 annual funds, in Community Preservation Act funding be appropriated, with \$556,588 to come from the FY23 Community Housing Reserve Account and \$1,391,468 to come from FY23 Unrestricted Funding Account, to the control of the Planning & Development Department to provide funding to the Newton Affordable Housing Trust for future projects that meet one or more of the CPA's eligible funding categories for Community Housing projects.

Proposed CPA Funding Accounts for the Newton Affordable Housing Trust			
Account Name	Account Number	Amount Currently Available	Proposed Amount for the NAHT
Community Housing FY23 Reserve Account	#58R10498 57900B	\$556,588	\$556,588
FY23 Unrestricted Funding Account	#58R10498 579000	\$3,092,471	\$1,391,468
<b>Total Project Funds</b>			<b>\$1,948,056</b>

[www.newtonma.gov/cpa](http://www.newtonma.gov/cpa)

Lara Kritzer, Community Preservation Program Manager  
[lkritzer@newtonma.gov](mailto:lkritzer@newtonma.gov) 617.796.1144

## SPECIAL ISSUES CONSIDERED BY THE CPC

**Community Needs:** City Council passed the enabling ordinance to create the new municipal affordable housing trust in December 2021 after several years of studying the potential benefits and requirements of these programs. The new Trust will assist the City in meeting its affordable housing goals by creating a streamlined process for funding new projects and developments. This proposal for initial funding of the Trust meets multiple goals listed in the Comprehensive Plan by creating a resource for preserving and creating affordable housing while also strengthening the City's financial resources for these affordable housing goals. Funding of the Trust also addresses the goals of the City's Consolidated Plan for FY21-FY25 by providing a funding resource for projects that produce new units, preserve existing units, support affordable housing, and further Newton's Fair Housing goals.

**Development Uses and Sources:** This proposal will use CPA funds to establish the Affordable Housing Trust Fund and build a reserve fund for future affordable housing projects. Any future project requesting this funding from the Trust will still be required to meet all of the requirements of the Community Preservation Act.

**Project Finances:** CPA funding was noted to be the primary funding source for the Trust Fund during the review process for the enabling ordinance. As part of these discussions, the CPC agreed to set aside its annual target amount for affordable housing, currently 35% of the program's annual funding, to the Trust once it was established. This recommendation is only for FY23 funding and the Trust is required to apply on an annual basis for any future CPA funds. While 35% of annual funding is the CPC's current target for Community Housing funding, a future Committee may choose to change its category funding targets at any time and would adjust future funding recommendations to the Trust accordingly. The Trust may also receive Inclusionary Zoning funds from time to time, but this is not anticipated to be a regular or reliable funding source.

## ADDITIONAL RECOMMENDATIONS *(funding conditions)*

1. Funding is to be used at the discretion of the Newton Affordable Housing Trust (NAHT) for any project which acquires, creates, preserves, rehabilitates/restores, or supports affordable housing as defined in the Community Preservation Act.
2. The CPC shall receive copies of all relevant plans, drawings, schematics, budget and marketing materials, etc. associated with the use of the CPA funding.
3. The CPC shall receive regular updates from the NAHT on the status of the Trust funds, how they are being used, and any plans for future projects or initiatives which might involve CPA funding.
4. Any CPA funds appropriated but not used for the purposes stated herein shall be returned to the Newton Community Preservation Fund.

## KEY OUTCOMES

The Community Preservation Committee will evaluate this project based on its success in furthering the City's goals for affordable housing and in completing projects eligible for community housing funding as defined by the Community Preservation Act.

## ATTACHMENTS

- July 2022 Proposal submitted to the CPC for the July 12, 2022 public hearing

Additional information not attached to this recommendation, including petitions and letters of support, are available on the CPC's website at: <https://www.newtonma.gov/government/planning/community-preservation-program/proposals-projects/newton-affordable-housing-trust-funding>

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

**436-22**

City of Newton



Ruthanne Fuller  
Mayor

PRE-PROPOSAL

PROPOSAL

(For staff use)  
date rec'd:

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

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

Lara Kritzer, Community Preservation Program Manager,  
City of Newton Planning & Development Department, 1000 Commonwealth Ave., Newton, MA 02459  
[lkritzer@newtonma.gov](mailto:lkritzer@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>	Newton Affordable Housing Trust Funding		
<b>Project LOCATION</b>	Full street address (with zip code), or other precise location. Citywide		
<b>Project CONTACTS</b>	Name & title or organization	Email	Phone
<b>Project Manager</b>	Ann Houston, Chair Newton Affordable Housing Trust	<a href="mailto:lkritzer@newtonma.gov">lkritzer@newtonma.gov</a>	617-796-1144
<b>Other Contacts</b>	Lara Kritzer, Community Preservation Program Manager	<a href="mailto:lkritzer@newtonma.gov">lkritzer@newtonma.gov</a>	617-796-1144
<b>Project FUNDING</b>	<b>A. CPA funds requested:</b> \$1,948,056	<b>B. Other funds to be used:</b> \$0	<b>C. Total project cost (A+B):</b> \$1,948,056
<b>USES OF FUNDS</b>	<input checked="" type="checkbox"/> Rental Assistance		<input checked="" type="checkbox"/> Mortgage Assistance
<b>TARGET POPULATION, TYPE OF HOUSING, SPECIAL FEATURES</b>			
Individuals <input checked="" type="checkbox"/>	Families <input checked="" type="checkbox"/>	Seniors <input checked="" type="checkbox"/>	Homeless/At Risk of Homelessness <input checked="" type="checkbox"/>
Rental <input checked="" type="checkbox"/>	Ownership (including condominiums) <input checked="" type="checkbox"/>	% Area Median Income:	Up to 100% AMI
<b>Project SUMMARY</b>	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.		
<p>In December 2021, the City of Newton established its first Affordable Housing Trust for the purposes of preserving the City's existing affordable housing units and creating new units that are affordable to low and moderate income households. During the review process for the ordinance, the Community Preservation Committee expressed its support for the creation of the new affordable housing tool and agreed to support the allocation of 35% of the City's annual CPA funding to the Trust for use in any affordable housing project that is allowable under the Community Preservation Act. This proposal is the Newton Affordable Housing Trust's first application for CPA funding to provide the initial funds to establish the Affordable Housing Trust Fund and begin the work of developing and furthering projects that further the City's affordable housing goals.</p> <p>The Trust is anticipated to be ready to accept new proposals for the use of its funding as soon as the CPA funding is in place. The goal of the Trust is to establish a simplified process for the allocation of these funds so that the funds can be quickly put to use to meet the affordable housing needs of the community. While the Trust has a stated goal of focusing funding on low and very low income households, the current proposal is for the use of the funding up to the 100% AMI allowed by the Community Preservation Act to allow the Trust with the greatest flexibility in using the funds to meet the affordable housing goals.</p>			

<b>Project TITLE</b>	<b>Newton Affordable Housing Trust</b>		
<b>USE of CPA FUNDS</b>		<b>COMMUNITY HOUSING</b>	
<b>(To be completed by CPC staff.)</b>	<b>Acquire</b>	X	
	<b>Create</b>	X	
	<b>Preserve</b>	X	
	<b>Rehabilitate/ Restore</b>	X	
	<b>Support</b>	X	
<b>COMMUNITY NEEDS</b>	From each of at least 2 plans linked to the <a href="#">Guidelines &amp; Forms</a> page of <a href="http://www.newtonma.gov/cpa">www.newtonma.gov/cpa</a> , 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.		
The NAHT supports affordable housing as recognized in the following plans:			
<p><b>Comprehensive Plan:</b> Funding of the NAHT meets the goals of the Comprehensive Plan for affordable housing by consolidating the City's available funding resources in a single location which provides affordable housing advocates and developers with a simplified, one-stop process for future funding. The Comprehensive Plan called for CPA funding to be a leading resource in the preservation of existing and creation of new affordable housing (Page 5-9) and the Trust provides the City with opportunities to work with the Plan's Strategic Action for Strengthening Financial Resources (Page 5-16).</p>			
<p><b>Consolidated Plan FY21-FY25:</b> Funding of the NAHT will assist the City in meeting the Strategic Plan Goals for Newton (Page 182) by providing funding for the production of new units and the preservation and rehabilitation of existing units. Trust funding can also be used to support affordable housing units and programs and to further the goals of Fair Housing in Newton.</p>			
<p><b>Community Outreach:</b> The Mayor, City Councilors, and numerous City residents and affordable housing advocates took part in the discussions surrounding the development of the Affordable Housing Trust Ordinance in 2020 and 2021 and its approval in December 2021.</p>			
<b>COMMUNITY CONTACTS</b>	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.		
<b>Name &amp; title or organization</b>	<b>Email</b>	<b>Phone</b>	<b>Mailing Address</b>
Fran Godine, Engine 6	<a href="mailto:godine@comcast.net">godine@comcast.net</a>	617-969-2625	
Jeanne Strickland, Exec. Director Newton Community Development Foundation	<a href="mailto:jstrickland@ncdfinc.org">jstrickland@ncdfinc.org</a>	617-244-4035	
Lizabeth Heyer, Chair Newton Housing Partnership	<a href="mailto:lheyer@2lifecommunities.org">lheyer@2lifecommunities.org</a>	617-912-8400	

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	Newton Affordable Housing Trust	
<b>SUMMARY CAPITAL/DEVELOPMENT BUDGET</b>		
<b>Uses of Funds</b>		
To fund future affordable housing projects that acquire, create, preserve, restore, rehabilitate, and support affordable housing in Newton as allowed in the Community Preservation Act Legislation.		\$1,948,056
<b>D. TOTAL USES</b> (should equal C. on page 1 and E. below)		<b>\$1,948,056</b>
<b>Sources of Funds</b>	<b>Status</b> (requested, expected, confirmed)	
CPA funding	Requested	\$1,948,056
<b>E. TOTAL SOURCES</b> (should equal C. on page 1 and D. above)		<b>\$1,948,056</b>
<b>SUMMARY ANNUAL OPERATIONS &amp; MAINTENANCE BUDGET (cannot use CPA funds)</b>		
<b>Uses of Funds</b>		
Not Applicable - Staff Support to come from Community Preservation Act Administrative Funds (Community Preservation Program Manager Position)		\$0
<b>F. TOTAL PROGRAM ADMINISTRATION COST</b> (should equal G. below)		<b>\$0</b>
<b>Sources of Funds</b>		
		\$0
		\$0
<b>G. TOTAL ANNUAL FUNDING</b> (should equal F. above)		<b>\$ 0</b>
Project TIMELINE	Phase or Task	Season & Year
	Application submitted for CPC Public Hearing	August 2022
	CPC and City Council review and approval process	August – October 2022
	City Council vote	September – October 2022
	Funding available for use by Trust	November 2022

CITY OF NEWTON

IN CITY COUNCIL

DRAFT

ORDERED:

That, in accordance with the recommendation of the Community Preservation Committee through its Chair, Jennifer Molinsky , the Zoning & Planning Committee through its Chair Alison Leary and the Finance Committee through its Chair Rebecca Walker Grossman, appropriation of one million nine hundred forty eight thousand fifty six dollars (\$1,948,056) in Community Preservation Act funding, with \$556,588 to come from the FY23 Community Housing Reserve Account and \$1,391,468 to come from FY23 Unrestricted Funding Account, to the control of the Planning & Development Department to provide funding to the Newton Affordable Housing Trust for future projects that meet one or more of the CPA’s eligible funding categories for Community Housing projects be and is hereby approved as follows:

FROM:	CPA Housing Budgeted Reserve (58C10498-57900C) .....	\$556,588
	CPA unrestricted Budgeted Reserve (58C10498-57900C) .....	\$1,391,468
TO:	Newton Affordable Housing Trust (5714P114-579700) .....	\$1,948,056

Under Suspension of Rules  
Readings Waived and Approved  
DRAFT



(SGD) NADIA H KHAN

Acting City Clerk

(SGD) RUTHANNE FULLER

Mayor

Date: \_\_\_\_\_