



JOSEPH A. CURTATONE
MAYOR



**CITY OF SOMERVILLE, MASSACHUSETTS
COMMUNITY PRESERVATION COMMITTEE
FY20 FUNDING CYCLE
APPLICATION COVER PAGE**

1. PROJECT INFORMATION

PROJECT NAME: Somerville Museum: Access for All (part 2)
 PROJECT LOCATION: Somerville Museum (1 Westwood Rd, Somerville, MA 02143)
 LEGAL PROPERTY OWNER OF RECORD: Somerville Historical Society
 ONE SENTENCE DESCRIPTION OF PROJECT: This renovation will increase the overall accessibility of the Museum and the historic collection to the public via an addition that includes an elevator.

Please indicate (X) all categories that apply to this project (minimum of one) in the chart.

	Open Space	Recreational Land	Historic Resources	Community Housing (blended projects only)
Acquisition				
Creation				
Preservation			X	
Support				
Rehabilitation/Restoration			X	



ESTIMATED START DATE: July 2020
 ESTIMATED COMPLETION DATE: July 2021
 CPA FUNDING REQUEST: \$292,737
 TOTAL BUDGET FOR PROJECT: \$1,588,548

2. APPLICANT INFORMATION

APPLICATION NAME / ORGANIZATION: The Somerville Historical Society dba the Somerville Museum
 CO-APPLICATION NAME / ORGANIZATION: _____
 CONTACT PERSON: Barbara Mangum
 MAILING ADDRESS: 9 Josephine Ave, Somerville, MA
 PHONE: 617-625-5809 (H); 617-331-7726 (C) EMAIL: bmangum411@aol.com; info@somervillemuseum.org

3. SIGNATURES

I (we) certify that all information provided in this entire submission is true and correct to the best of my (our) knowledge and that no information which might reasonably affect funding has been excluded. I (we) authorize the Community Preservation Committee and/or the City of Somerville to obtain verification from any source provided.

Name (printed) Barbara Mangum (President) Signature  Date 9/23/19
 Name (printed) Alison Drasner (Asst. Director) Signature  Date 9/22/19



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CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE FY20 FUNDING CYCLE SUBMISSION REQUIREMENTS CHECKLIST

Please check (✓) each item included in your submission, which should include the applicable items in the order listed below.

GENERAL:

- Application Cover Page (form provided)
- Submission Requirements Checklist (this form)
- Narratives (prompts provided in instruction packet)
- Project timeline: a project schedule showing all major milestones (i.e., study, design, environmental, permitting, construction, etc.), including receipt of other funding sources
- Grant and Trust Funds Disclosure Form (form provided)
- Campaign Contribution Mandatory Disclosure and Certification Form (form provided- only needed if requesting \$50,000 or more in CPA funds)
- Ordinance to Safeguard Vulnerable Road Users Acknowledgement (form provided)

Eligibility Determination

FINANCIAL:

- Budget Summary (form provided- construction projects must include cost for permanent CPA dedication sign)
- Itemized budget of all project costs, including the proposed source for each cost
- Three written quotes for project costs. If quotes cannot be secured, detailed cost estimates may be used if a thorough explanation of the estimates is included.
- Proof of secured funding (e.g., commitment letters or bank statements), if applicable. If providing bank statements, please redact identifying information such as account numbers.

VISUAL:

- Map of the property location showing all features pertinent to the project, including current or future rapid transit stations
- Photos of the project site (not more than 4 views per site); include digital copies

OWNERSHIP/OPERATION (NON-CITY):

- N/A; owner is the applicant Documentation of site control or written consent of the property owner to undertake the project, if the owner is not the applicant
- N/A; owner is the applicant City has signed on as a co-applicant for community projects proposed on City land.
- Certificates of Good Standing from the [City](#) and the [State](#), if applicable
- 501(c)(3) certification, if operating as a non-profit
- Purchase and sale agreement or copy of current recorded deed, if applicable

COMMUNITY SUPPORT (RECOMMENDED):

- Letters of support from residents, community groups, other City boards, commissions, or departments, or from City, state, or federal officials

The project hasn't changed since the last application cycle; all letters and support are still relevant

HISTORIC RESOURCES PROJECTS:

- Documentation that the project is listed on the State Register of Historic Places or a written determination from the Somerville Historic Preservation Commission that the resource is significant in the history, archeology, architecture, or culture of Somerville.
- Photos documenting the condition of the property
- Report or condition assessment by a qualified professional describing the current condition of the property, if available.

PLANS AND REPORTS (IF AVAILABLE; SUBMIT DIGITAL COPIES ONLY)

- Renderings, site plans, engineering plans, design and bidding plans, specifications, and any MAAB variance requests
- Applicable reports (e.g., 21E, historic structure report, appraisals, survey plans, feasibility studies).

Materials

Addendum

SHPC Project Notification Approval

ZBA Project Notification Approval

MCH Project Notification Approval

**Somerville Museum
Request to the Community Preservation Committee
for Somerville Museum: Access for All (part 2)**

Submitted to Kristen Stelljes
Community Preservation Act Manager/ SomerStat
City of Somerville
93 Highland Avenue
Somerville, MA 02143

by Barbara Mangum and Alison Drasner
Officers of the Somerville Museum
One Westwood Road
Somerville, MA 02143

September 24, 2019

PROJECT DESCRIPTION

1. Describe the project, including the project location and the property involved.

The Somerville Museum requests \$292,737 from the fund of the Community Preservation Act (CPA) FY20 to make this historic building accessible by installing an addition enclosing an elevator onto the Westwood Road entrance. The elevator will bring visitors into the Museum on all three floors: the basement, the first floor exhibition areas, and the second floor conference room and library. This has been mandated by the Massachusetts Architectural Access Board. The introduction of the elevator has required further broadening of the scope of the project to include strengthening of the foundation under the entryway through the addition of a steel beam and adding a moisture barrier to the west end of the Museum's basement. Beyond the elevator, other changes must happen to give access to all throughout the three floors to make our space accessible to all: i.e., reconfiguring the height of the reception area desk, rebuilding of the restrooms and providing greater space in the kitchen for a wheelchair. In addition, the project includes the conservation and installation of a Palladian window, which was removed from the building in a 1980s renovation, to be reinstalled into the rear of the Museum's façade per a Massachusetts Historical Commission deed restriction whenever an elevator addition was to be constructed.

The Museum's historic building is located at One Westwood Road in Somerville and is part of the Westwood Road Historic District. This project was awarded \$327,573 in CPA funds in 2016 and another \$300,000 in emergency funds in June of this year to carry out this project; however the design of the addition was in flux in the 2016 application and the award was contingent upon working with the Somerville Historic Preservation Commission (SHPC) to develop a design that would receive a Certificate of Appropriateness. The final design was approved in March of 2016 and was re-estimated. The work was also approved by the Zoning Board of Appeals. A three-year delay in construction was incurred due to an unfortunate and unsuccessful lawsuit against the Museum. Once resolved, specifications were completed and the project was bid out in May of this year. The lowest bidder came in at \$1,264,000, significantly more than the Museum had anticipated from the earlier estimate, however the scope had increased as outlined above. Adding management costs and other related costs, the project is now estimated to cost \$1,588,548.

2a. Why is this project needed?

Making the Museum accessible is required to fulfill the mission of the Somerville Museum as a community service organization and by law. The Code of Massachusetts Regulations (CMR) 521 requires that buildings that surpass 30% of their fair market value in expenditures on capital improvements over a three-year period become accessible, where "accessible" is defined as:

"A site, building, facility or portion thereof that complies with 521 CMR and that can be approached, entered, and used by persons with disabilities. "

In 2012 and 2013 the Museum undertook capital projects to replace the slate roof in kind to and repair and paint the exterior windows, triggering the 30% rule.

The current request for funds will supplement the \$1,045,811 that the Museum has in hand or in pledges to cover the costs of construction. These funds are needed to meet the higher costs

associated with the SHPC's approved design and the escalation in the cost of construction projects in Somerville since 2016. The original design upon which the CPA FY16 funds were conditionally awarded was an attempt by the architects, Peter Quinn Architects, to create an addition that did not compete with the original building and that was affordable. The final SHPC-approved design is a very different but historically empathetic design that requires significantly more expensive materials and labor. Changes in the design include building a slate-covered gable roof on the addition, using brick and mortar construction to match the original building material, and adding carefully crafted decorative wooden dentils and molding to the addition.

Undertaking the ADA project will address the most important need of the Museum. This cannot be stressed enough. Since 2012, organizations including the Somerville Bike Path, the Committee for a Stronger Somerville, the Somerville Arts Council and the City's Historic Preservation Commission have been forced to look elsewhere for their meeting space, due to the Museum's lack of handicapped-visitor accessibility. As a community organization dedicated to encouraging dialogue between the various cultural groups of Somerville, it is difficult to operate as a service institution without proper ADA access.

This project is timely(!) In 1986, the Trustees renovated the Museum building and planned to add an elevator addition in much the same location as now. Two wheelchair-accessible restrooms were built in the museum's basement. Unfortunately, the Museum was unable to raise the funds for the elevator at that time and the plan was abandoned. In the meantime, rules have changed and the restrooms no longer meet the building code. We now have a chance to return to the project and finish it.

Why The Palladian Window and Why now?

During the 1980s building renovations, a cast stone Palladian window on the Westwood Road façade was removed. The Palladian window was crated and stored in the Museum's basement for future installation on the rear of the building, whenever an elevator was built. The Massachusetts Historical Commission (MHC), a funder of the renovations, placed this preservation restriction on the Museum's deed in 1986. Therefore, the window will be installed on the west (formerly "rear") side of the building as part of the overall construction of the elevator addition.

The cost of reinstallation of the Palladian window is based on undertaking this project in conjunction with the construction of the addition. It was approved in the CPA award in 2016.

2b. How does it preserve and enhance the character of Somerville?

The Museum as a whole:

The Museum is a jewel within the City and enhances the area's reputation as a center for the arts. Not every city has a Museum, let alone an historic building with an elegant interior and a 1792 Bulfinch staircase. In fact, this is the only Museum in the country that can boast this. Somerville is a city that encourages community, innovation and the sharing of the benefits of prosperity throughout the population. The Museum is essentially this: an historic and cultural institution, which preserves the legacy of Somerville through its building and collections and offers artists, musicians, historians, philosophers and all people of Somerville a venue and voice for contributing to the cultural landscape. It is run by volunteers with the exception of one part-

time assistant director and exists only because of the love of the people of Somerville for it as a cultural institution. To fulfill its promise, it must be made fully accessible to all.

The Handsome Design of the Entrance on Westwood Road:

The City's preservationists, Sarah White and Kristenna Chase, as well as two preservation architects from the Somerville Historic Preservation Commission worked with Peter Quinn Architects (PQA), Richard Graf, RA, the Museum's architectural consultant, the Trustees and neighbors to develop the final design of the addition. The Museum was built between 1925 and 1933 in the Federal Revival style. The design of the elevator addition was in part inspired by the late 18th c. Federal architecture of Charles Bulfinch's Tontine Crescent and Samuel McIntyre's Derby Summer House.

After two public hearings, the Somerville Historic Preservation Commission granted the Museum a Certificate of Appropriateness on June 23, 2016, finding the plan "appropriate for, or compatible with the preservation of the historic district."

2c. How does the project benefit the public?

As the project supports accessibility to the Museum and collections, it supports the purpose of the Museum in its entirety. Specifically, the mission of the Somerville Museum is to bring to the public programming, which enhances understanding and appreciation of the history, arts and culture of Somerville, Massachusetts, through:

- collecting, preserving and exhibiting to the public objects and other material pertaining to the history, arts and culture of Somerville;
- initiating and administering related educational programs, including concerts, lectures, readings, gallery tours and demonstrations, tours of the city, workshops and school programs;
- providing and maintaining a facility, the Somerville Museum, in which programming and community activities take place;
- establishing relationships and collaborations with other, like-minded organizations, including the Somerville public and private schools, the public library, agencies of the city government, the universities and other public and private arts, humanities, educational and social service organizations.

For Somerville to have such a professional cultural facility in an historic building, which can be accessed by all, where concerts are played, where artwork is exhibited, where lectures are given, where the people of Somerville can know that their heritage is represented and that relevant works of art, documents and other artifacts are preserved for generations to come, is something of which all people of Somerville can be proud.

2d. What population(s) will it serve?

Visitors and Residents:

Fifty thousand Somerville residents live within one mile of the Museum, at least half of the City's public and private school students live within walking distance, and three bus routes

spanning the City include stops within three blocks of the Museum. The new ADA compliant entrance will enable the Museum to host a new subset of the public that until now, has found it difficult to gain entry. As our population ages, it will be more important than ever to make the building and collections easily navigated.

The Museum's visitation rate averages several thousand visitors per year. Scholars and researchers use the collection by appointment. Numerous community organizations such as Somerville Open Studios, Books of Hope, Historic Somerville and the Visiting Nurses Association utilize the building for events, meetings, exhibitions and receptions throughout the year as well (provided they do not need to be ADA compliant at present.)

Requests for archival information are made each month to the Museum and vary from several per week to many more depending on the scale and scholarship of the project. The bulk of these are for information on homes in Somerville. The Museum works closely with the City of Somerville Historic Preservation Commission, Parks Department, Archives and Library on interpretive issues of history. Both the sculptures at Powder House Park and the historical information signage at Conway Park were a result of collaboration between City agencies and the Museum.

Artists, Musicians, Historians, Cultural Organizations throughout the City:

The Museum provides a service to visual artists in the City through exhibitions providing visual exposure and by hosting the annual "First Look" exhibition of Somerville Open Studios (SOS) in May. This event has been held at the Museum since 2002. By providing an elegant, well-lit, single focus for the city-wide event, the show helps prospective studio-goers determine which studios they would like to visit. The Museum also provides city-wide maps locating the studios and offers other information and help to visitors and exhibiting artists alike.

One of the board members of SOS, Peter Belford, spoke recently to the Museum Trustees about the importance of another aspect of the Museum exhibition to SOS members: it brings the artists of the City together to enjoy each other's company and to learn from each other. The life of an artist can be isolating. The exhibition, installation, de-installation, the reception and close out event help artists to connect with each other and see themselves as part of the larger creative community.

The Community Curatorial Program began in 1994 and has continued on an annual basis from 2003 to present. The project starts from the grassroots with an individual or organization (the Community Curator), who approaches the Director of the Museum with an idea for an exhibition. This idea is taken to the Director of Exhibitions and worked through to see if it has potential to become a significant and high-quality exhibition. If accepted, the Museum provides the exhibition space, helps shape the design, maintain Museum standards of exhibition and supports fundraising efforts on the part of the Curator to undertake the show.

In 2016, the Museum launched a seed grant program to enhance the Community Curatorial Program called Community Curators. Two competitively selected Community Curators have been awarded \$2,500 each since 2017 to develop great exhibitions for the public in the following years. The goal of the program is to secure exhibitions and programming two years in advance to allow for more time to meet the required high standards of the Museum and for fundraising. This program has been a resounding success and is bringing national and internationally known artists into the Museum to work with the collection.

The Museum is known for its wonderful acoustics and the annual concerts of the Duo Maresienne and Friends are a wonderfully intimate way to experience early music, some only

meant for the chambers of the Kings and Queens of Europe. Olav Chris Henriksen and Carol Lewis are renowned internationally for their performances and the Museum is honored to be able to present their concerts to the public for the 29th straight year.

Historic Somerville holds their monthly meetings at the Museum and hosts 4 lectures each year through its well-regarded Local History Lecture Series. The goal of this series is not only to entertain and enlighten audience members, but also to promote investigation into the history of Somerville and bring new research to light. This history often finds its way into City resources such as the walking tours, trolley tours and celebratory events, such as First Flag. The great majority of lecturers allow their talks to be recorded to create a public archive, that is shown regularly on the City's cable TV.

Students and Educators:

Museum volunteers collaborate with Historic Somerville and the City's Historic Preservation Commission to involve high school students in various programs. In 2012, Adda Santos, history teacher at the Somerville High School, formed the Local History Club with 16 students. Each year members of the club, many of whom are first generation Americans or immigrants, are introduced to the rich history of Somerville by participating in the Colonial Fair at Foss Park on Patriots' Day and in the Ghosts of Somerville at Milk Row Cemetery. These events are popular public activities and help raise the awareness of all citizens of Somerville and others to the importance of this land in American history. The Somerville Museum is the venue where the students meet outside of class and where the extensive collection of authentic costumes and props are stored.

3. How does the project meet the general and category-specific priorities outlined in the Community Preservation Plan, including how the project incorporates sustainable practices and design?

Funds are used to maintain the character that makes Somerville a great city in which to live, work, play and raise a family. The general CPA priorities that the Somerville Museum's project addresses are 1) improving accessibility for all member of the community and 2) incorporating sustainable practices in the design of the addition. Examples are the incorporation of energy saving measures such as the use of historically appropriate storm windows and manually operated shades throughout new construction to retain heat during the winter and lessen sunlight during the summer months. The west end of the Museum will be waterproofed which will also help to create a better environment for collections and people by the elimination of high humidity and mold. Stack + Co is LEED certified and is well aware of the energy conservation needs of museums and of keeping the operating costs as affordable as possible.

3) This project has received endorsements from the Massachusetts Architectural Access Board, the Massachusetts Historic Commission, the SHPC, the Somerville ZBA, and state officials including House Representatives Denise Provost and Christine Barber, former State Representative Tim Toomey, and State Senator, Pat Jehlen.

4) Another area that is prioritized by the CPC is the support given to Somerville's diverse population and immigrants. This priority is also central to the Museum's mission. The Museum strives to record and involve Somerville's diverse community through its many cultural events, community curator exhibitions, concerts, and as a venue for celebratory occasions for organizations that support immigrants, such as the Welcome

Project. In addition, the Museum annually awards certificates of recognition to local businesses for their contributions to the culture and history of the City. Certificates have been given to many diverse community business owners. Charan Devereaux's exhibition "Union Square at Work" specifically involved recording this current period of change in Union Square as the Green Line Extension has pushed out numerous older businesses from the area.

II: Regarding the Strategic use of funds, the Museum 1) continues to work toward leveraging other funding sources, in this case private donations, the Wallace Fund and the Massachusetts Cultural Facility Fund to match the CPA contributions. 2) This project also addresses a long-standing need in the community for venues available to the public which meet ADA requirements. 3) This is certainly a time-sensitive opportunity as this project is required by law and needed to fulfill the Museum's mission. Delay has only served to escalate costs. 4) The Museum has two quite small but important endowments at present, which will help with future maintenance; however, any capital funds needed to meet rising costs must be raised on a case by case basis. As the Museum is primarily run by volunteers, this is in itself a lengthy process and keeps the volunteers away from their primary focus, which is the Museum as a cultural institution.

Finally, 5) this project is not just about adding an elevator to the Museum. This project is about transformative change that allows access not just to an historic and beautiful building, but to the cultural events and local history that is stored within the collections in the building. Access will be for the public's current and longterm physical, intellectual and emotional enjoyment.

MEASURING SUCCESS

1. What are the goals of this project?

The goal is to make the Somerville Museum building, events, exhibitions, and other cultural offerings accessible to all. In addition, the project will install the Palladian window removed in 1986 from the Westwood Road entrance to the West façade of the building as required by a Massachusetts Historical Commission deed restriction.

2. How will the success of this project be measured?

The success of the ADA project will be physically evident when visitors in wheelchairs are able to access the building's cultural events and with the increased number of public organizations that can hold their cultural events at the Museum. Once the Palladian window is installed as described, it will be a success.

FINANCIAL

1. Describe all successful and unsuccessful attempts to secure funding and/or in-kind contributions, donations, or volunteer labor for the project.

Since 2011, the Museum Trustees have raised funds for the ADA project from multiple sources. Other than the CPC awards and the most recent private donation of \$250,000, these are:

- \$85,000 from the Wallace Foundation in 2013

- \$40,000 from the Massachusetts Cultural Facilities Fund (MCFF) in 2014
- \$1000 from Tufts University
- \$5000 from East Cambridge Bank
- \$5000 from Winter Hill Bank
- \$1000 from Central Bank
- \$500 from the Lions Club
- \$45,000 from private donations, including the Trustees

Of these funds, only \$22,684 remain in the Wallace Fund and \$40,000 is still to be requested from the MCFF. The remainder of the money was spent on various building code reports, plans for ADA access in general, the schematic design and construction drawings for the Portico project (a one story lift), a plot plan survey, and \$93,000 on the schematic design, permitting assistance, construction drawings and bid review for the 4 stop elevator addition.

Trustees also applied to the Amelia Peabody Foundation, American Express, Copeland Family Foundation, Geoffrey C. Hughes Foundation, George Frederick Jewett Foundation, Lowes Co., Richard and Susan Smith Family Foundation and the Richard Saltonstall Foundation for support of the accessibility project and were unsuccessful in these.

The Museum is currently ineligible to receive grants from organizations such as the Fidelity Foundation, which is a source of capital funds for many organizations in the arts in the Boston area, as it does not meet the requirement of \$1,000,000 in annual revenue. Other granting agencies such as the Boston Foundation do not fund capital projects for nonprofits. Finally, federal programs that fund the museums such as the National Endowment for the Humanities, the National Endowment for the Arts and the Institute for Museum and Library Services do not fund ADA projects, but do require that grant recipients are compliant with ADA standards. The Museum may be eligible for these grants by showing that it is working toward this goal; however, national grants are generally very competitive and are difficult for small historic and artistic cultural organizations to receive. Barbara Mangum, President of the Museum, has applied twice to the Institute of Museum and Library Services, most recently in 2018, and once to the National Endowment for the Humanities to improve collection care for the Somerville Museum and the applications have been rejected each time.

The Trustees are very grateful to the Community Preservation Act Committee and people of Somerville to have received an award in 2016 that included \$327,573 toward making the Museum accessible and installing the original Palladian window in the building's façade per an MHC deed restriction. At the time of the grant request deadline for that year (December 2015), the Museum based the cost estimates on the most recent plan that had been brought before the Somerville Historic Preservation Commission (SHPC). That was in November of 2015 and the costs had been estimated by Chip Sheehan, a good contractor with a small shop. With architectural fees added, the cost was estimated as \$419,175. Although this design was ultimately not approved by the SHPC, the CPC was confident in the Museum's ability to work with the SHPC to develop a suitable design in the future; therefore, the award was made conditional on developing this approved design. As a result, it was understood that the cost of the ADA project would likely increase and that the Museum would come back to the CPC to request additional funds.

Once the design of the elevator addition was approved by the SPHC in the Spring of 2016, construction costs were estimated by Highland Development Company, a larger company. Due to many changes in the project design the cost estimate rose to \$703,328. As a result, the Museum requested funds from the CPC in the FY17 round of grants for \$235,296.

Unfortunately, the Museum was not awarded the requested funds as the Museum's abutter sued the Museum in September of 2016 for adverse possession and prescriptive easement of the driveway at the west end of the Museum's property. This meant that the requested funds could not be used within the year and therefore, funds were awarded to those applicants who could use the monies sooner.

Earlier this year, once the bid quotes had come in, the Museum Trustees discovered that costs had escalated greatly in the intervening 2.5 years of the lawsuit and appeal. After the bid in May 2019, the Museum requested emergency funds from the CPC in the amount of \$600,000 to bridge the gap in funding and encourage other donations. The CPC generously awarded the Museum \$300,000 toward the goal. In addition, these funds encouraged a private donor to come forward with a pledge of a matching gift of \$250,000. The stipulation of the match has not yet been decided but will be between a 1:1 or 1:2 match with the funds available after the match has been raised.

In an effort to further reduce the gap between costs and revenue, the architects met with the contractor at Stack+ Co. to determine some ways that costs could be reduced without reducing the quality of the project beyond what would be acceptable to the SHPC. The following are considered reasonable ways of limiting costs:

- The contractor will use Pella Architect Series windows rather than the higher end Kolbe.
- Decorative columns on the exterior will be made of polystone rather than cast stone. (The other stone-like elements on the building such as the Palladian window and window sills are cast stone)
- The Museum will forego air-conditioning in the west end of the Museum at this time
- Masonry flashing details will be changed to a membrane with a stainless steel drip edge rather than stainless steel throughout.

Together, these changes will save the Museum \$60,742 in construction costs and more in added contingency costs and architect and contractor mobilization fees.

Cost saving measures to be implemented:

PQA has given the Museum a 10% discount on his fee for architectural services to nonprofits for the ADA project. Graf has limited his fee to less than 4% of the total construction cost, a significant savings over his normal fee. Barbara Mangum, Project Manager, is charging a minimal fee of 1% of the total project costs to cover her involvement in order to keep the cost of the project down. Evelyn Battinelli, the Museum's Director and Dyan Blewett, the Museum's Treasurer are donating their time to the project, as are other members of the Trustee Board. The Palladian window installation is being coupled with the construction of the elevator addition to save on project mobilization and scaffolding costs.

2. How was the total CPA funding request determined?

Construction Costs:

The costs of the ADA project are based on the lowest bid received on May 11, 2019 for the Accessibility Project. This bid was from Stack + Co., a highly respected construction firm. On the advice of our architect, Peter Quinn, we have applied an inflation factor of 5% to the construction costs to cover the delay in the project from 2019 to 2020.

Management Costs:

PQA's cost estimate for construction oversight is based on a factor of 10% of the construction costs minus \$88,000 in schematic, permitting and specification costs paid to date. This figure was reviewed by both Richard Graf and Peter Quinn and was acceptable. The cost of Graf's oversight of the project was calculated on the basis of 4% of construction costs with a further reduction of \$5000 that Graf felt should be applied to the architect's fees. Mangum's fee as project manager was limited to 1%, although her contribution is expected to exceed this. The remainder will be a pro bono contribution.

Administrative and Indirect Costs:

\$2500 has been added to the administration of the project to have a certified public accountant review the Museum's financials. The Museum works with an accountant, Thomas Pilleri of Medford, to file the annually required federal 990 tax form and the state's public charities form when the Museum's income from grants and donations exceed \$200,000. The \$2,500 is based on the figure that the Museum has paid in the past year with a small increase to reflect the increasing complexity of the filings expected to be associated with this larger project.

Indirect Costs are based on the average New England Museum salaries that a Museum Director and Treasurer would make if paid. These are considered pro bono contributions. The overhead costs reflect the monthly costs of utilities and incidentals required to maintain the Museum as an ongoing public facility during the period of construction.

Sources of Funds:

The Massachusetts Cultural Facility Fund (MCFF) awarded the Somerville Museum funds in 2015 toward an accessibility project that was limited to the first floor of the Museum ("the portico project"). The amount of the award was half of that requested at the time, \$40,000. As the project evolved into the addition of an elevator and other changes to the building, the cost of the project is now many more times the amount than was initially assessed. Therefore, the Museum has proposed to the MCFF to close out the design and construction document portion of the accessibility project (about \$93,000) and request the \$40,000 as reimbursement. This would close out the FY2016 project, clearing the way for the Museum to request construction funds for the elevator addition from the MCFF in the FY2020 round of funding. Although the MCFF cannot guarantee that the project will be funded in 2020, the Museum has several strong points in its favor: the Museum has completed the design of the addition, all required approvals have been granted from the Massachusetts Architectural Access Board, the Somerville Historic Preservation Commission, the Somerville Zoning Board of Appeals, and the Massachusetts Historical Commission, the Museum already has the match in hand, the bid has been completed, the contractor chosen and the project is ready to go, the Museum has historically successfully completed MHC and MCFF grants in the past, the installation of the Palladian window is a Massachusetts Historical Commission requirement and there is sympathy for the Museum's present circumstances as a result of the delay due to the unfounded lawsuit against the Museum by abutters.

Charitable Contributions:

As a result of the CPC's generosity in funding the access project with emergency funds in the amount of \$300,000 in June of this year, an anonymous donation was made to the Museum of \$250,000 with the stipulation, that it is to be matched 1:2 with new funds to bring the Museum

into the realm of enough funds to complete the project. This further grant from the CPC of \$290,267 along with the anticipated contribution from the MHC of \$250,000 would bring us to this point.

Included in the Museum's charitable contributions section of funding sources is another \$50,000 that the Trustees believe can be raised from a capital campaign, based on the amount that was raised in the 2011 campaign to match the \$104,000 grant from the MCFE for the replacement of the slate roof and other work on the gutters and trim. Hopefully more will be raised, but this is considered a conservative number.

3. Will the project require funding over multiple years? If so, please provide annual funding requirements.

The Museum plans to apply to the MCFE in January of 2020 and should hear in June whether or not it has been awarded funds to complete the project. Provided the award is forthcoming, and with the CPA funds requested herein in hand, the project should commence immediately. Construction is anticipated to begin July 1 of 2020 and to continue for a period of 11 months. After the end of construction, another two months is anticipated to cover the time for final payments to be concluded, check list items to be finished, and the final report with photographs to be submitted to both the MHC and the CPC. Therefore, the schedule shows the project closing out at the end of July 2021.

4. How will the project be affected if it does not receive CPA funds or the full amount of the CPA funds requested?

If the Museum does not receive the CPA funds requested, the project will be delayed until funds are found to cover the costs of construction in full. The Museum Trustees are now beginning work on a capital campaign that should strengthen the Museum for years to come. Campaigns are a general requirement of all museums in this day and age, but often take several years to come to fruition. Any funds from the CPC will be a welcome addition to the capital campaign to complete this project in the near future.

PROJECT MANAGEMENT

1. Describe the applicant.

Somerville Museum is a private non-profit and is classified as a 501(c)(3) of the Internal Revenue code.

The Museum was founded in 1897 as the Somerville Historical Society. The construction of the Museum's brick Federal Revival style building was begun in the 1920's to house the growing collections of the Society. In the 1980's, a handful of committed individuals raised the funds to restore and fully renovate the building. The result was the opening in 1988 of the Somerville Museum.

The Somerville Museum seeks to engage audience(s) in an on-going dialogue with local artists, scholars, and educators with the larger aim of fostering cultural education and understanding, through innovative programming. In the context of neighborhoods and community, the Somerville Museum exhibits local visual arts, history and culture, musical and dramatic performances; develops hands-on history learning projects in collaboration with the Somerville Public School Department; and is available as a meeting place for local historical and cultural organizations.

2. If a community organization is applying with a government entity as a co-applicant, describe how the two organizations will work together, how finances will be managed, and how the work will be continued after the conclusion of CPA funding.

This does not apply.

3. Demonstrate that the applicant has successfully completed projects of similar type and scale or has the ability to complete the project as proposed.

The Museum successfully carried out projects to weatherize the Museum and protect historic collections funded by a CPA grant in FY15. Activities included adding insulation above the Museum's tin ceiling in the large exhibition hall, installation of storm windows and provision of remotely controlled shades on the upper tier of windows and shades on all windows in exhibition areas. These measures have made a demonstrable improvement in the interior climate of the spaces. Expenditures were approximately \$150,000.

In 2012, the MHC awarded the Museum a \$13,000 grant in matching funds to repair and repaint the building's windows, trim and front door. Museum donors raised the matching funds for a total project cost of \$48,012. The project was successfully completed in 2013.

In 2008, the Massachusetts Cultural Council awarded the Museum \$104,500 from the MCFE toward the replacement of the Museum's historic slate roof and repair of the wooden gutters, drain spouts, fascia, snow guards and copper flashing. Despite the economic downturn, the Museum was able to raise the matching funds from over 400 supporters – a testament to the beloved nature of the institution. The roof was completed in December of 2012, but required an additional \$50,000 worth of work: - masonry pointing, painting of the roof trim, and stiffening of the roof beams among other needs. The total project cost was \$224,447 when completed.

In addition to the Museum's demonstrated ability to undertake this project successfully, both Barbara Mangum and Richard Graf have extensive experience in managing large projects. In short, the Museum has the capability to complete this project with all of its complexity, successfully.

4. Identify and describe the roles of all known participants, including the project manager.

The project team includes:

Barbara Mangum, Project Manager

Mangum is an objects conservator with over 30 years of experience in the preservation of works of art. She will be responsible for meeting the requirements and goals of the grant and the overall success of the project. She and the collection care committee members will work to protect the historic documents and artifacts during construction and to make certain that collection pieces such as the Bulfinch staircase are protected after wheelchair access. She currently serves on the Trustee Board as President.

Richard Graf, RA and Owners' Representative

Graf has worked with the Museum for many years and is a licensed architect specializing in the design, construction, development, management and ownership of historic properties. He received his Bachelor of Architecture from The Cooper Union, NY, NY in 1975, and his Master of Architecture in Urban Design in 1983 from Harvard University. He has been a practicing architect working in the historic rehabilitation of properties for over thirty years.

Graf will act as the Museum's representative in terms of reviewing the work of construction in conjunction with PQA, signing off on successful completion of the projects prior to payment, working through change orders as necessary, monitoring insurance and other requirements of the contract, and making sure that all project specifications are met. He will document the changes in the Museum's appearance before and after completion and submit the required forms to the MHC.

Evelyn Battinelli, Museum's Executive Director and Trustee

Battinelli will work with the Assistant Director, Alison Drasner, and the Museum's Chair of the Security Committee, Lawrence Willwerth, to make sure that the Museum is covered during the time when contractors are on site and will generally help with logistics and matters pertaining to the Museum.

Dyan Blewett, Trustee and Treasurer

Blewett is a specialist in computer programming at MGH and was elected to the post of Treasurer at the Museum in 2011. She will administrate the grant financially and is responsible for the accounts. She will work with the Museum's accountant, Thomas Pilleri, to make certain that the Museum's finances are accurate, transparent and filed responsibly.

Peter Quinn, Architect

Peter Quinn of Peter Quinn Architects is based in Davis Square. He received his undergraduate and master's degree in architecture from the University of Pennsylvania and has over 30 years of architectural experience. He founded Peter Quinn Architects in 1997 and has grown it into a mid-size architectural firm specializing in adaptive reuse of existing buildings, historic preservation, educational facilities, multifamily housing, mixed use commercial/ residential buildings, community center facilities and site planning. Richard Graf has worked with him closely over a number of years and highly recommended his firm to the Museum Trustee Board.

Stack + Co., Joshua Brandt, Founder and Principal, LEED certified

This company's work has been celebrated in Architectural Record, Dwell, Design New England, Boston Home, and Green Building & Design and the Firm was awarded the "Best of Boston Home, Custom Home Design/Build" from Boston Home in 2019, New England Home magazine's "Rising Stars" in 2019, and "Best Design Build Firm" by Boston Architects in 2018. They have experience in working with the Institute of Contemporary Art in Boston as well and are highly recommended by Peter Quinn.

5. Describe the feasibility of the project and how it can be implemented within the timeline and budget included in this application.

The construction drawings for the new addition are now at 99% completion. Several details, such as exterior lighting still need to be reviewed by the SHPC for final approval, however these do not need to go before the full board. They can be reviewed by SHPC staff, which is a less formal procedure.

Once all funds have been awarded or pledged, the Museum will contract with Stack + Co. to begin the work of demolition and excavation. This will be followed by upgrades to the foundation to support the weight of the addition. The elevator shaft will be constructed and the elevator installed. The elevator is a four-stop elevator, with stops on each of the three floors of

the Museum and a half stop for those in wheelchairs who need to get from the ground level up to the first floor. It is expected that the work will be completed between 11 and 13 months. The installation of the Palladian window on the West side of the building will occur during this period.

The Museum Trustees have decided to remain open as much as possible throughout this construction, using the Central St. door and the main exhibition hall for events and shows.

6. Describe any known or potential barriers to the successful on-time commencement and completion of the project, including any permits or inspections required.

At this time, the only barrier to successful on-time commencement and completion is related to raising the funds required. Once under contract, the contractor will pull the building permit. Otherwise, all permits and approvals are in place to proceed.

7. Describe any ongoing maintenance required and who will be responsible for it.

The Museum will maintain the elevator manufacturer's warranty and will contract with a LU/LA elevator service provider for preventive maintenance as often as recommended by the manufacturer.

Aesthetically, acceptable barriers will be created and placed around the central columns of the important Bulfinch staircase to protect them from contact with wheelchairs.

8. Describe any permits, approvals, MAAB variance requests, or restrictions that are required for the project to go forward and the status for each.

The MAAB granted the Museum specific variances to the requirements of accessibility in December 2015 with a further request to submit designs for the handicapped toilets and improving clearances around doorways, as requested. This submission was overlooked due to the lawsuit and the subsequent halting of the architectural design work on the project. Once the lawsuit was resolved in the Museum's favor, the submissions were made and the MAAB approved the plan to reduce doorway clearance and work toward the construction of the new code approve toilets. (See MAAB decision letters 2015, 2019).

Paul Holz of the Massachusetts Historical Commission has approved the Museum's Project notification form as of 9/17/19.

The SHPC granted the Museum a Certificate of Appropriateness for the plans for the new elevator addition on June 21, 2016.

The Zoning Board of Appeals approved a special permit for the Museum on August 18, 2016.

9. Note if the applicant has previously received CPA funds and if so, a concise summary of the impact of the previous CPA project.

The Museum was awarded CPA funds in FY15 to undertake a series of improvements to the building envelope to improve the Museum's environment. The tin ceiling of the great hall has been insulated from the attic, reducing heat loss. Relative humidity and temperature recorders were procured and placed on each of the three floors of the Museum, allowing volunteers to monitor the environment. Storm windows have been installed in most of the windows of the building and have significantly cut down heat loss and noise, as well as reducing the levels of ultraviolet light entering the galleries. The large windows at the upper level of the great hall have been outfitted with remotely controlled blackout shades and the lower level windows in the great hall and small gallery have manually operated blackout shades to prevent light exposure to

historic materials when exhibited during non-open hours. The Museum's basement has been protected from flooding due to malfunction of the sump pump by installing a battery backup system.

Funds to improve security at the Museum were part of the CPC award in FY16. The Museum's fire alarm panel and alarm system have been upgraded and the Museum is working closely with a highly recommended alarm company to protect the collections. The Museum's historic wood paneled Central St. doors were conserved by Sean Fisher of Mussey Conservation and were outfitted with a panic bar system to conform to building code. A wrought iron handrail was added to the center of the stairs at the Central St. entrance to aid visitors getting in and out of the Museum, when this door is open. The Museum is very grateful to the CPA for the funding to undertake all of this work.

HISTORIC RESOURCES REHABILITATION PROJECTS

1. Describe how the proposed project complies with the U.S. Secretary of the Interior's Standards for Rehabilitation, as required by the CPA legislation under the definition of rehabilitation.

The sections of the Secretary of the Interior's Standards for Rehabilitation that pertain to the proposed new ADA entryway are:

RE: Work done to meet accessibility requirements and health and safety code requirements; or retrofitting measures to conserve energy.

Although this work is quite often an important aspect of rehabilitation projects, it is usually not a part of the overall process of protecting or repairing character-defining features; rather, such work is assessed for its potential negative impact on the building's historic character. For this reason, particular care must be taken not to radically change, obscure, damage, or destroy character-defining materials or features in the process of rehabilitation work to meet code and energy requirements.

When the Museum sought to build an elevator addition onto the Museum in 1986, it removed the Palladian window from the Westwood Road entrance with the intent to place it on the rear of the building, thereby protecting and preserving this aspect of the building's character. Funds ran short and the elevator was not built; however, the MHC required that the Museum sign a preservation restriction on its deed to replace the Palladian window whenever an elevator was built. This will happen during this project.

Other character defining aspects of the original building, including the choice of traditional materials and Federal style design elements have been incorporated into the addition in a sensitive manner that meets the Secretary of the Interior's Standards for Rehabilitation.

2. Describe how the applicant will ensure compliance with these standards as the project is ongoing, including an identification of who will make historic preservation determinations.

Barbara Mangum, a conservator of objects by training, is the project manager and with the architect, who is the Owner's representative, Richard Graf, will ensure compliance with the Secretary of the Interior's Standards for Rehabilitation of Historic Properties. Both will be involved with historic preservation determinations as they arise and are very familiar with the standards. Graf was in fact part of a select group that met in San Francisco and advised on changes to the Secretary's of the Interiors National Standards for Historic Preservation in 2005.

Graf will photo-document changes to the building before and after completion of the proposed work. He will also update the historic preservation form and send this to the Massachusetts Historical Commission on conclusion of the project.

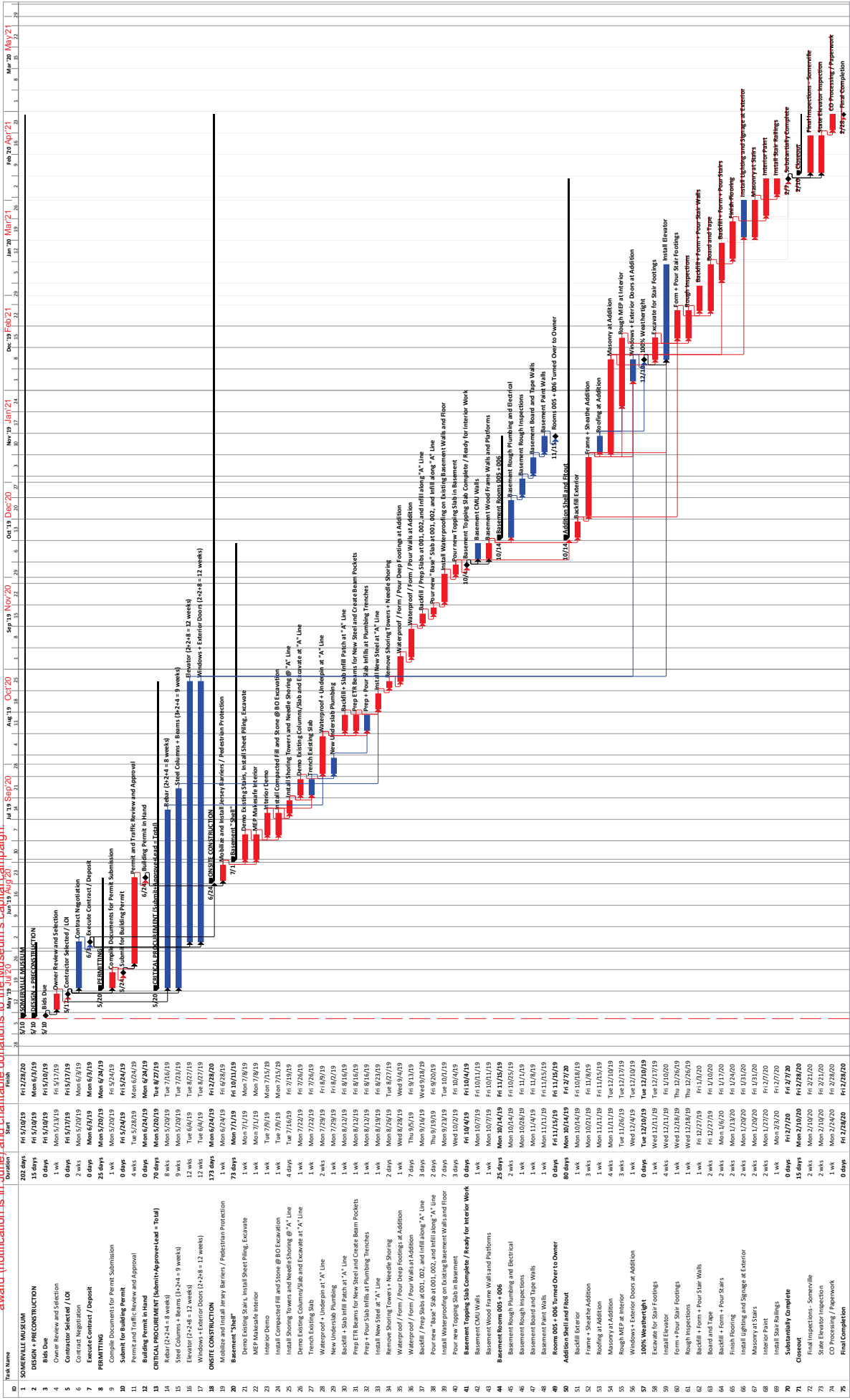
ACCESSIBILITY REQUIREMENTS

1. Describe how the proposed project complies with all ADA/MAAB Regulations.

The goal of this project is to meet the requirements of the American with Disabilities Act and the Code of Massachusetts Regulations, (CMR) 521 of the MAAB, which was established through Massachusetts General Law, Part I, Title II, Chapter 22, Section 13A.

Quinn, Graf and Mangum met with Thomas Hopkins, Executive Director of the MAAB in August and November of 2015 and were informed that the Museum had to make all three floors available to people with disabilities to meet the current accessibility standard, given that volunteers work in all parts of the building. Other code upgrades required include: creating a wheelchair friendly reception desk, changing out certain hardware and widening non-historic doorways. (See Vernon Woodworth's Building Code Survey (2011) and Updated Memo (2015). The Museum asked for and was granted relief from the CMR 521 for the lack of compliance at the Bulfinch staircase, the historic Central St. vestibule and entry, clearance widths at existing historic doors, lack of compliant handrails at existing stairs, and lack of compliant signage. The Museum was given time to submit a plan for providing accessible toilets and additional clearance maneuverability at doorways. The plan was submitted in July of 2019 and approved shortly thereafter. When completed, the Museum building will comply with all ADA/MAAB regulations.

Note: the timeline for the CPA FY20 request is based on this schedule provided by Stack+Co. in their bid. The project is estimated to take 202 days beginning once the funds for the project are in hand and the contract has been officially awarded. Tentatively, the start date is July 1st, 2020. This assumes that the Museum raises the required funds through a combination of CPA FY20 funds, an MCFF grant award (notification is in June), and charitable donations to the Museum's capital campaign.



SM (Stack) Report completion and submission to the CPC and MHC



GRANT AND TRUST FUNDS DISCLOSURE FORM
PURSUANT TO CITY OF SOMERVILLE CODE OR ORDINANCES SEC. 15

(copies of the Ordinance are available upon request)

Instructions: All applicants for grant and/or trust funds administered by the City must complete this form as part of its application submission to the City of Somerville. Complete all sections of this form.

Section 1

Legal Name of Applicant: **Somerville Historical Society dba the Somerville Museum**

Indicate whether the applicant had any grant, contract, or agreement with a federal, state or local agency terminated within the last three (3) years.

Check One:

Yes

(If yes, please identify the grant, contract, or agreement including parties, term, and cause of termination on an additional page.)

No

Section 2

Applicants are required to disclose any circumstances constituting a conflict of interest or potential conflict of interest arising from or relating to the proposed grant or trust disbursement, whether real or apparent.

Conflict of Interest Prohibited. No employee, officer or agent of the grantee shall participate in any particular matter, including but not limited to, the selection, or in the award or administration of a contract, grant or subgrant, or employment agreement administered by way of funds received by the City of Somerville if a conflict of interest, real or apparent, would arise. Such a conflict would arise when:

- 1) an employee, officer or agent, or
- 2) any member of his or her immediate family, or
- 3) a business organization in which he or she is serving as officer, director, trustee, partner, or employee; or
- 4) any person or organization with whom he or she is negotiating or has any arrangement concerning prospective employment,

has a financial or other interest in the person or entity selected for an award, or a contract, grant, subgrant, or employment agreement of the grantee or the funds for which originate from or are awarded through the city.

Check One:

No Conflict Of Interest

Potential or Actual Conflict of Interest (If checked, disclose in detail all relevant facts, including names of individuals or organizations, relevant contract, grant, subgrant or employment agreement, and source of funding on an additional page.)

Section 3

Attach a copy of applicant’s policy addressing conflicts of interest that may arise involving management, employees and the members of its board of directors or other governing body. See the *City of Somerville Code of Ordinances Section 15-42(c)* for complete requirements. Should the policy be revised during the grant term, a copy of the revised policy must be submitted to the City within thirty (30) days of being revised.

See attached

Section 4

Identify all officers, employees, contractors, subgrantees or other persons providing any type of service in relation to the proposed grant activity, in the following format. Use additional page(s) as necessary.

Name (Individual or Entity)	Association	Service Provided	Value of Service (\$)	Amount of City Funds Supporting Service (\$)	Mark “X” if individual or entity has had any grant, contract, or agreement with a federal, state or local agency terminated within the last 3 years.*
See attached					

*If yes, please identify the grant, contract, or agreement including parties, term, and cause of termination on an additional page.

Section 5

This form is hereby completed on behalf of the applicant named above. Through the undersigned individual, the applicant hereby certifies that the completed form is true and accurate. The applicant acknowledges that it has read, understands, and agrees to comply with, the requirements of *City of Somerville Code of Ordinances Section 15*.

During the term of any grant, grantees have a continuing obligation to submit an updated Disclosure Form to the City of Somerville immediately as to any circumstances which constitute a potential or actual conflict of interest.

Signature: 

Print Name of Authorized Individual: Barbara Mangum

Title: President

Date: 9/23/19

SOMERVILLE MUSEUM
One Westwood Road
Somerville, MA 02143

SOMERVILLE HISTORICAL SOCIETY

CONSTITUTION
(Excerpt From)
(As Amended and Restated)

ARTICLE XI
CONFLICTS OF INTEREST

No Trustee of the corporation shall vote on any action or transaction contemplated or undertaken by the corporation in which such Trustee has a financial or other business or personal interest, even if that interest has been acknowledged to and approved by the Board of Trustees or its designated Executive Committee; provided, however, that such Trustee shall, if present at the meeting at which such action or transaction is considered, be counted for purposes of a quorum. The abstention of such Trustee from voting and the reason or reasons therefor shall be recorded in the minutes of the meeting at which said vote is taken.

DISCLOSURE FORM (additional sheet)

Identify all officers, employees, contractors, subgrantees or other persons providing any type of service in relation to the proposed grant activity, in the following format. Use additional page(s) if necessary.

Name (Individual or Entity)	Association	Service Provided	Value of Service (\$)	Actual Value (\$)	Amount of City Funds Supporting Service (\$)	Mark "X" if individual or entity has had any grant, contract, or agreement with a federal, state or local agency terminated within the last 3 years*
Richard Graf	Fort Point Consulting, Inc.	Consulting and Architectural Advisor (includes 10% contingency)	\$40,000	\$40,000	\$0	
ADA Accessibility Project						
Peter Quinn	Peter Quinn Architects	Elevator design project (includes 10% contingency)	\$54,295	\$54,295	\$0	<i>payout included CPA FY16 funds for design</i>
Vernon Woodworth	AKF Group LLC	Code Consultant	\$6,720	\$6,720	\$0	
Joshua Brandt	Stack + Co. (Stack Design Build, LLC)	General Contractor	\$1,401,959	\$1,401,959	\$920,310	
Palladian Window						
TBD	TBD	Conservation	\$21,000	\$21,000	\$0	
Accountant						
Tom Pilleri	Pillero Romano, P.C.	Accountant	\$2,500	\$2,500	\$0	
TOTALS			\$1,526,474	\$1,526,474	\$920,310	
Officers + Employees						
Evelyn Battinelli	Somerville Museum	Executive Director + Trustee	\$21,344	\$0	\$0	
Dyan Blewett	Somerville Museum	Trustee + Treasurer	\$12,000	\$0	\$0	
Eugene Brune	Somerville Museum	Trustee	\$0	\$0	\$0	
Dr. David Guss	Somerville Museum	Trustee	\$0	\$0	\$0	
Stephen Mackey	Somerville Museum	Vice President + Trustee	\$0	\$0	\$0	
Barbara Mangum	Somerville Museum	Trustee	\$14,230	\$14,230	\$0	
Regina Pisa	Somerville Museum	Trustee	\$0	\$0	\$0	
William White	Somerville Museum	Executive Committee + Trustee	\$0	\$0	\$0	
Lawrence Willwerth III	Somerville Museum	Secretary + Trustee	\$0	\$0	\$0	
Mike Dacey	Somerville Museum	Trustee	\$0	\$0	\$0	
Alison Drasner	Somerville Museum	Asst. Director	paid hourly	paid hourly	\$0	



**CITY OF SOMERVILLE CAMPAIGN CONTRIBUTION ORDINANCE SEC. 15-72*
MANDATORY DISCLOSURE AND CERTIFICATION FORM**

INSTRUCTIONS: APPLICANTS, PLEASE COMPLETE THE ENTIRE FORM AND FILE WITH THE SAME CITY OFFICE OR AGENCY WITH WHOM YOU FILED OR WILL FILE BELOW APPLICATION.

PART I. APPLICATION FOR ITEM

Describe the item you have, or will apply for, relating to this disclosure:

ITEM:	
TYPE (X):	<input type="checkbox"/> Contract <input checked="" type="checkbox"/> Zoning Relief <input checked="" type="checkbox"/> Real Estate <input checked="" type="checkbox"/> Financial Assistance
CITY DEPT. OR AGENCY:	

PART II. APPLICANT INFORMATION

Provide the following information for the Applicant:

NAME:	The Somerville Historical Society dba the Somerville Museum
ADDRESS:	1 Westwood Road, Somerville, MA 02143
TELEPHONE NO.:	617-666-9810
E-MAIL:	bmangum411@aol.com; info@somervillemuseum.org

On Schedule A, you must also provide the same information for the Applicant’s principals, chief executive officer, president, chief financial officer, treasurer, chief operating officer, chief procurement officer, directors, or persons performing similar functions, or shareholders in excess of ten percent and managing agent to the extent applicable. **Please complete Schedule A. If not applicable, please check N/A on Schedule A.**

PART III. CAMPAIGN CONTRIBUTION DISCLOSURE

On Schedule B, Applicants must disclose all contributions made by the applicant during the 12 months prior to the application (identified in Part I), to any person who was a candidate for elective office of the City of Somerville (mayor, board of aldermen, and school committee). The attribution rules in Section 15-73 of the Somerville Code of Ordinances shall apply to the contributions that must be disclosed. **On Schedule B**, applicants must also disclose such contributions made by persons attributed to the applicant under the ordinance. If the applicant is an individual, any such contributions made by the individual, any spouse of the individual, and any children of the individual must be disclosed. If the applicant is not an individual but a corporation, partnership or limited liability corporation, then any contributions made by any of its chief executive officer, president, chief financial officer, treasurer, chief operating officer, chief procurement officer, directors, members, managers, principals, or persons performing similar functions, or shareholders in excess of ten percent, and their spouses and children, must be disclosed. **Please complete Schedule B. If disclosure is not required, please check N/A on Schedule B.** *Note: Contributions made before January 1, 2017 are not required to be disclosed.*

* Please see the Pay to Play and Campaign Contribution Ordinance for definitions and all requirements.

PART IV. SUBCONTRACTOR INFORMATION

Have you applied for a Contract and intend to use a subcontractor on this Contract? Yes No

If "Yes", complete Schedule C. If "No", proceed to Part V.

PART V. SIGNATURE, CERTIFICATION, AND ATTESTATION:

I, the undersigned applicant, hereby further certify as follows: If awarded the item that is applied for (as identified above) under subsections (a), (b), (c), or (d) in Section 15-72 of the Somerville Code of Ordinances, the Applicant, and anyone attributed to the Applicant, and if the application is for a contract any subcontractor used on the contract, will not make any contribution in any calendar year in an amount in excess of \$500.00 to any individual incumbent or to any individual candidate for elective office of the City of Somerville for the next four (4) calendar years following the award of the item, or for the duration of the term of the contract, whichever is longer.

Signed under the pains and penalties of perjury:

Signature of Affiant: Barbara Mangum *Barbara Mangum* Title: President

Printed Name of Affiant: Barbara Mangum Date: 9/24/19

Subscribed and sworn before me this 24 day of Sept, 2019

My Commission expires: 10/16/2020



Nilofar Shaikh

THIS FORM SHALL BE OPEN TO PUBLIC INSPECTION

SCHEDULE A – APPLICANT INFORMATION

INSTRUCTIONS: FOR EACH OF APPLICANT’S PRINCIPALS, CHIEF EXECUTIVE OFFICER, PRESIDENT, CHIEF FINANCIAL OFFICER, TREASURER, CHIEF OPERATING OFFICER, CHIEF PROCUREMENT OFFICER, DIRECTORS, OR PERSONS PERFORMING SIMILAR FUNCTIONS, OR SHAREHOLDERS IN EXCESS OF TEN PERCENT AND MANAGING AGENT TO THE EXTENT APPLICABLE, COMPLETE THE FOLLOWING. ATTACH ADDITIONAL PAGES IF REQUIRED.

IF NOT APPLICABLE, CHECK HERE: .

<u>NAME</u>	<u>POSITION</u>	<u>E-MAIL ADDRESS</u>	<u>PHONE NO.</u>	<u>ADDRESS</u>
Evelyn Battinelli	Exec. Dir., Secretary + Trustee	evelyn.battinelli@gmail.com	617-710-7453	24 Hudson Street Somerville, MA 02143
Dyan Blewett	Treasurer + Trustee	drblewett@comcast.net	617-776-6734	48 Tennyson Street Somerville, MA 02145
Eugene Brune	Trustee	eugeneC79@comcast.net	617-628-5835	25 Lowden Ave Somerville, MA 02144
Dr. David Guss	Trustee	David.Guss@Tufts.edu	617-666-8165	75 Properzi Way Somerville, MA 02143
Stephen Mackey	Vice President + Trustee	smackey@somervillechamber.org	617-623-8730	95 Lexington Ave, Somerville, MA 02144
Barbara Mangum	President + Trustee	bmangum411@aol.com	617-331-7726	9 Josephine Ave Somerville, MA 02143
Regina Pisa	Trustee	RPisa@goodwinlaw.com	617-730-9919	399 Hammond Street Chestnut Hill, MA 02467
William White	Exec. Committee + Trustee	william.a.white@verizon.net	617-627-9667	259 Lowell Street, #128 Somerville, MA 02144
Lawrence Willwerth III	Asst. Secretary + Trustee	lwillwerth3@yahoo.com	617-625-7800	PO Box 45235 Somerville, MA 02145
Mike Dacey	Trustee	michael.dacey@gmail.com	781-962-4834	1 Fitchburg Street, #F193 Somerville, MA 02143
Alison Drasner	Asst. Director	alison@somervillemuseum.org	202-302-2995	98 Central Street Somerville, MA 02143

SCHEDULE B– CONTRIBUTION DISCLOSURE INFORMATION (Cont'd)

Name of Contributor	Relationship to Applicant	Name of Recipient	Date of Contribution (mm/dd/yyyy)	Amount of Contribution
Eugene Brune	Trustee	Com to Elect Mark Niedergang	3/27/17	\$50
		Com to Elect Tara DeChristaforo	3/29/18	\$100
		Com to Elect Pat Jehlen	8/22/18	\$50
		Com to Elect Marion Ryan	4/11/18	\$100
		Com to Elect Marion Ryan	7/26/18	\$100
		Com to Elect Christine Barbara	4/29/18	\$50
		Com to Elect Jimmy Tingle	8/22/18	\$50
		Com to Elect Paul Donato	9/24/18	\$60
		Com to Elect Will Mbar	4/24/18	\$50
Dyan Blewett	Treasurer + Trustee	Bill White Campaign	5/17/18	\$100
		Denise Provost Campaign	4/29/18	\$100
		Mike Capuano Campaign	10/1/18	\$100



SOMERVILLE ORDINANCE TO SAFEGUARD VULNERABLE ROAD USERS
CITY OF SOMERVILLE CODE OF ORDINANCES ARTICLE VIII, SEC. 12-117 et seq.

Prospective contractors must familiarize themselves with the City of Somerville’s Ordinance to Protect Vulnerable Road Users. The full text of this local law can be found [here](#).

1. **Request for Inspection:** Inspections are conducted on Thursdays from 4pm-7pm at the Somerville Department of Public Works, located at 1 Franey Road. Each inspection takes approximately 20 minutes.
 - a. Any vendor covered by this Ordinance shall complete an inspection request form and email it to fleetinspections@somervillema.gov.
 - b. Please submit request form no later than 3pm on the Tuesday before the requested inspection date.
2. **Fee:** The fee for the initial inspection is \$100. The fee for a renewal inspection (every two years) is \$50.
 - a. Payment of the fee is due upon scheduling of the inspection. The fee can be paid via check or credit card. Checks should be made out to the City of Somerville and include the vendor’s phone number.
3. **Approval:** Vehicles inspected and approved by the Fleet Division will have an inspection approval sticker affixed to the windshield of the vehicle. A copy of the inspection report and certificate of inspection shall be issued to the vendor.
 - a. Inspection stickers are not transferable.
 - b. Any major overhaul of safe guard equipment shall be required to be re-inspected.
4. **Rejection:** If a vehicle is rejected for failing to comply with any of the technical specifications outlined in the ordinance, it shall be corrected and henceforth re-inspected within 30 days at no additional fee.
 - a. If a second inspection results in a rejection, a fee of \$50 will be required for any subsequent inspections.
 - b. Any vendor who fails to comply within 60 days of their first inspection may be subject to having their contract cancelled.
5. **Questions:** Please direct questions about vehicle inspections to Fleet Superintendent Ron Bonney at rbonney@somervillema.gov or at (617) 625-6600, ext. 5524.

Acknowledgement

In accordance with Sec. 12-119 “Requirements” in the Ordinance, bidders must sign the following:

Unless certified that the Ordinance is not applicable to this contract or otherwise waived by the City, I acknowledge that my company has installed (or will install prior to commencing work for the contract) side guards, cross-over mirrors or equivalent blind spot countermeasures, convex mirrors or equivalent blind spot countermeasures, side-visible turn signals, and appropriate warning signage, in accordance with SCO Chapter 12, Article VII on all large vehicles it uses or will use within the City of Somerville in connection with any contract.

Authorized Signatory’s Name

Date

Company Name

I certify that the Ordinance does not apply to this contract for the following:

- Vehicles do not meet or exceed Class 3 GVWR Vehicles do not exceed 15 MPH No vehicles on project
 Other: _____



JOSEPH A. CURTATONE
MAYOR



CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE FY20 FUNDING CYCLE ELIGIBILITY DETERMINATION FORM

Submit an electronic copy (fillable PDF available at www.somervillema.gov/CPA) no later than **4:30pm Wednesday, July 10, 2019** to: Kristen Stelljes, kstelljes@somervillema.gov. [Download and save file before you begin typing to ensure work is saved.]

PROJECT NAME: Somerville Museum: Access for All (part 2)

PROJECT LOCATION: Somerville Museum (1 Westwood Rd, Somerville, MA 02143)

APPLICANT(S) NAME / ORGANIZATION: Somerville Historical Association dba the Somerville Museum

CONTACT PERSON: Barbara Mangum

MAILING ADDRESS: 9 Josephine Ave, Somerville, MA

PHONE: 617-625-5809 (H); 617-331-7726 (C)

EMAIL: bmangum411@aol.com; info@somervillemuseum.org

Interested in collaborating with local artist on your project? Yes No

Please indicate (X) all categories that apply to this project (at least one). For more detailed information on these categories, refer to the "Community Preservation Act Funding Allowable Uses" chart on the next page.

	Open Space	Recreational Land	Historic Resources	Community Housing (blended projects only)
Acquisition				
Creation				
Preservation			X	
Support				
Rehabilitation/Restoration			X	

PROPERTY OWNERSHIP:

Legal Property Owner of Record (if applicable):
Somerville Historical Association dba the Somerville Museum

Is the owner the applicant? Yes No

If No, does the applicant have site control or written consent of the property owner to submit an application? City of Somerville must be co-applicant on all projects on City property.

Yes (Attach documentation)

No (Project will be deemed ineligible for this applicant)

FOR HISTORIC RESOURCES PROJECTS:

Is the resource in a Local Historic District and/or listed on the State Register of Historic Places? Yes No

(you can check designation at mhc-macris.net)

If no, has the Somerville Historic Preservation Commission made a determination that the resource is significant? Yes No

PROJECT SUMMARY:

The Somerville Museum requests funds, should they become available in FY2020 for historic preservation projects, to complete a capital improvement plan that includes construction of an elevator to make the building accessible to all in the community.

The Somerville Museum was awarded \$300,000 in CPA FY2020 funds via an application for emergency funds in May of 2019. These funds are gratefully received and the Museum only plans to apply for further funds if the Historic Preservation section of the CPA FY2020 receives more funds than were anticipated in the earlier estimate. If further funds were to become available, the Museum requires another \$543,000 on a slightly reduced scope of an elevator construction budget of \$1,491,000. The Trustees are actively, though quietly pursuing funds through private donations at present to meet this goal. However, any contribution, would be greatly welcomed and would help to alleviate the burden of raising such funds on this worthy historic cultural resource established 121 years ago.



JOSEPH A. CURTATONE
MAYOR



PROJECT STATUS (What community need is this trying to address and what level of planning has already been undertaken to inform the proposed project?):

Construction costs have increased greatly in the Somerville area since this project was first proposed in 2015. It was estimated in 2015 and again in 2016 by contractors familiar with projects such as this. However, in 2019, as the specifications were further developed and certain structural issues became known, the costs of the project doubled. Although some cost savings have been found by reducing the scope, the project is still essentially intact. When completed, it will be a game-changer for the organization. It will bring the Museum into the 21st c. and allow it to fulfill its mission to preserve the past, reflect the present and shape the future of our community.

The community need is accessibility. Right now, the Museum is not accessible and many members with mobility disabilities cannot visit and those that can are challenged to access the restrooms in the basement. The point of this project is not the elevator as an end in itself, but rather to “unlock” the Museum’s potential for use by the community for now and future generations.

The Board of Trustees has been working with our architectural consultant, Richard Graf of Fort Point Consulting, Inc., Peter Quinn of Peter Quinn Architects, LLC and the Somerville Historic Preservation Commission since 2015 on the design of this project. It has been approved by the Massachusetts Architectural Access Board, the Massachusetts Historical Commission and financially supported by the Wallace Foundation, and the Massachusetts Cultural Facility Fund as well as with private donations. With additional funds to meet our goal, the elevator construction will be completed in 2020.

FOR CPC USE: Date Received _____ Date Reviewed _____ Date Applicant Notified _____

Eligible

Potentially Eligible

Not Eligible

More Information Needed

COMMENTS:

FINANCIAL

- Budget Summary*
- Itemized budget of all project costs
- Three (3) written quotes**
- Proof of secured funding: bank statement
(more proof available upon request)

*The Museum is currently designing a banner for the front of the Museum to include the CPA logo

**We're just including the written quote from Stack + Co.



**CITY OF SOMERVILLE, MASSACHUSETTS
COMMUNITY PRESERVATION COMMITTEE
FY20 FUNDING CYCLE
BUDGET SUMMARY**

JOSEPH A. CURTATONE
MAYOR

PROJECT NAME: Somerville Museum: Access for All (part 2)

APPLICANT: Somerville Historical Society dba the Somerville Museum

SUMMARY OF PROJECT COSTS

Please include a complete itemized budget of all project expenses, including the proposed funding source for each expense, in your submission. Budget needs to include cost of permanent CPA dedication sign if requesting construction funds.

PROPOSED SOURCE	EXPENSES				TOTAL
	STUDY	SOFT COSTS*	ACQUISITION	CONSTRUCTION**	
1 Somerville CPA FY20					\$292,737
2 MCFF FY15		\$40,000			\$40,000
3 Wallace Foundation		\$22,684			\$22,684
4 CPA FY15				\$17,710	\$17,710
5 CPA FY16				\$327,573	\$327,573
6 CPA FY 20 emergency funds				\$300,000	\$300,000
7 Charitable Donations		\$152,356		\$147,644	\$300,000
8 MCFF FY20				\$250,000	\$250,000
9 Museum Indirect Costs		\$37,844			\$37,844
TOTAL PROJECT COSTS		\$252,884			\$1,588,548

*Soft costs include design, professional services, permitting fees, closing costs, legal, etc.

** Construction includes new construction, preservation, rehabilitation, restoration work, and/or accessibility related expenses

EXPLANATION OF FUNDING SOURCES

Please explain the status of each funding source (i.e., submitting application on X date, applied on X date, received award notification on X date, funds on hand, etc.). For sources where funding has been awarded or funds are on hand, please include documentation from the funding source (e.g., commitment letter, bank statement) in application packet

	SOURCE	SECURED? (YES/NO)	STATUS OF FUNDING SOURCE
1	MCFF 15	Yes*	Awarded, contract pending, closure expected in 2019
2	Wallace Foundation	Yes	Funds on hand
3	CPA funds FY15,16 and emergency funds 20	Yes	Secured, funds may be requested
4	Charitable Donations	No	The donation of \$250k is pledged but requires a \$500k match. \$50,000 minimum is expected from a Capital Campaign
5	MCFF 20	No	The MCFF FY15 grant will be closed out by the end of the year. The deadline for new applications is Jan. 10, 2020; awards are announced in June 2020.
6	Museum contribution (indirect costs)	Yes	Secure

Budget Summary

CPA FY20

ITEM	COST	NOTES
Bid received on May 10, 2019		
Stack+Co. Construction Contract	\$1,264,143.00	
Palladian window installation	\$18,901.00	
Substitution of Pella Architect Series Wood Windows in lieu of Kolbe	-\$21,642.00	
Palladian window conservation	\$21,000.00	
Use of Polystone columns in lieu of cast stone	-\$10,500.00	
Eliminate AC in westend of basement	-\$24,000.00	
Change Masonry Flashing detail to membrane with S.S. drip edge in lieu of S.S. through wall flashing:	-\$4,600.00	
Subtotal	\$1,243,302.00	
Inflation factor for delay to 2020-21 (5%)	\$62,165	PQA recommendation to cover escalating costs
new total	\$1,305,467	
construction contingency at 6%	\$78,328	
Mobilization, Protection - Owner at 3%	\$39,164	
Total construction cost	\$1,422,959	
R Graf, Owner's Representative (4%)	\$40,000	This figure was calculated on the basis of 4% of the project cost minus the amount that Graf has been paid to date and what he has negotiated with the Museum. It represents a cost savings over his usual fee.
P. Quinn, Architect and firm (10%)	\$54,295	This figure was calculated on the basis of 10% of the project cost minus the amount that Quinn has been paid to date for work on the building addition. Quinn has also given the Museum a 10% discount on his labor as a good will gesture.
B.Mangum, Project Manager (1%)	\$14,230	
V. Woodworth, ADA code consultant	\$6,720	fee for consultation
Builder's Risk Insurance	\$10,000	recommended by Richard Graf
Certified public accountant	\$2,500	required for projects over \$200,000 by the IRS.
Subtotal	\$127,745	
Administration and Oversight		
Evelyn Battinelli, Executive Director 1.5%	\$21,344	
Dyan Blewett, Treasurer \$40/hr x 6 hrs/wk x 50 weeks	\$12,000	
Overhead 15% of operating expenses of circa \$30,000	\$4,500	
Total Indirect Costs	\$37,844	
Grand Total	\$1,588,548	
Available Funding for Access project		
Wallace Foundation	\$22,684	
MCFE	\$40,000	

ITEM	COST	NOTES
Somerville CPA FY16 elevator addition grant	\$327,573	
CPA FY15 re-purposed funds for water proofing	\$17,710	
CPA FY20 emergency funds award	\$300,000	
donor matching award (1:2)	\$300,000	
indirect contribution	\$37,844	
Total	\$1,045,811	
Amount needed:	\$542,737	
Request from MCFF - January 10, 2020 deadline, notification: June 2020	\$250,000	will ask for the amount of funds required to complete the project, but expect to receive only half if funded. This is typical of MCFF awards.
Remainder required:	\$292,737	Amount we are requesting from the CPA for FY20

Somerville Museum

Elevator Addition

Construction Services Proposal
May 10, 2019

Stack + Co.
555 East 2nd Street
Boston, MA 02127
www.stackac.com



Bid Form

Proposal

Assumptions and Quals

Schedule

Proposed Site Logistics Plan

Firm Profile and Case Studies

Project Team

References

D. Alternates

For Alternate No. 1: Add \$ \$18,901

Description – Add for the field assembly and installation of the historic Palladian Window Set in the Attic level existing brick wall, as described in the Drawings and Specifications

See budget summary for Alternates 2 and 3

E. Bidder understands that the Owner reserves the right to reject any or all bids and to waive any formalities in the bidding process.

F. The undersigned agrees that if selected as General Contractor, within Twenty-One (21) days, weekends and legal holidays excluded, after presentation thereof by the Owner, execute a Construction Contract in accordance with the terms of this Bid.

G. The bidder agrees that this bid shall be good and may not be withdrawn for a period of 30 days (excluding weekends and holidays) after the scheduled closing time for receiving bids.


H. The undersigned certifies that this bid is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this subsection the word “person” shall mean any natural person, joint venture, partnership, corporation or other business or legal entity.

I. The undersigned agrees to commence work on the Contract within seven (30) calendar days from receipt of written notice to proceed issued by the Owner and to thereafter diligently and continuously carry on the work. He agrees to Substantially Complete the work of this Contract on or before the date of Substantial Completion set forth in the Contract Agreement.

J. The undersigned shall include with the Bid a Proposed Construction Schedule.

K. The undersigned shall include with the Bid a Schedule of Values of Construction Costs based on CSI divisions. Please note that Contractor General Conditions, Profit and Overhead, Project Requirements, Insurances, and Contractor Fee shall be listed as separate line items.

H. The Bid shall include the following information:

Date:	5/10/19
Submitted By (Company):	Stack Design Build, LLC (Stack + Co.)
Signature	
Name	Joshua Brandt
Title	Managing Member
Business Type	LLC

END OF SECTION 00 21 13



Somerville Museum
Stack Project #19026

BUDGET SUMMARY

May 10, 2019

Scope	Budget Amount
01000 - Project Requirements	\$ 50,270
02050 - Demolition + Shoring	\$ 54,920
02200 - Site Prep & Utilities	\$ 106,900
02950 - Landscaping	\$ -
03300 - Concrete	\$ 119,696
04200 - Masonry	\$ 137,500
05100 - Structural Steel	\$ 52,750
05500 - Misc. Metals	Inc. in 05100
06100 - Rough Carpentry	\$ 94,271
06400 - Finish Carpentry	\$ 27,650
07200 - Insulation	\$ 3,226
07500 - Roofing	\$ 25,431
07900 - Misc Thermal and Moisture	Inc. in 03300
08100 - Doors, Frames, Hardware	\$ 21,580
08800 - Windows	\$ 26,500
09250 - Walls and Ceilings	\$ 35,250
09300 - Tile	\$ 14,707
09400 - Countertops	Inc. in 06400
09600 - Floor Finishes	\$ 1,377
09900 - Paint	\$ 13,500
10000 - Specialties + Signage	\$ 10,519
11000 - Equipment	\$ -
12000 - Furnishings	\$ -
14000 - Conveying Systems	\$ 99,476
15300 - Fire Protection	\$ -
15400 - Plumbing	\$ 29,150
15500 - HVAC	\$ 39,750
16000 - Electrical	\$ 67,500
30000 - General Conditions	\$ 130,500
01000 - Permit	\$ 23,730
Subtotal	\$ 1,186,153
50000 - Design + Construction Contingency	\$ -
60000 - Insurance	\$ 17,792
70000 - Fee	\$ 60,197
BUDGET TOTAL	\$ 1,264,143



Somerville Museum
Stack Project #19026

BUDGET SUMMARY

May 10, 2019

Scope Alternates	Add/Alternate Amount
Items below are excluded from the Budget but may be added for the all-inclusive amounts as shown.	
Alternate #1 - Installation of Historic Palladiun Window - to be completed within project schedule duration	\$ 18,901
Alternate #2 - Allowance for Garaventa 5 year Preventative Maintenance Plan and Extend Parts Warranty	\$ 11,404
Alternate #3 - Furnish Pella Architect Series Wood Double Hung Windows, in lieu of Kolbe Heritage Windows	\$ (21,642)

ASSUMPTIONS AND QUALIFICATIONS

May 10, 2019

General Qualifications

- This Budget is based on Open Shop Labor.
- This Budget is based upon and subject to all Qualifications noted in the enclosed Budget Detail.
- This Budget excludes any work indicated as an "Exclusion" in the enclosed Budget Detail.
- Costs for hazardous material testing and abatement are excluded.
- Costs for remediating existing non-conforming building conditions at the direction of code officials are excluded.
- Costs associated with unforeseen concealed existing conditions are excluded.
- Costs for all fees to Utilities/Municipalities for new or temporary utility services are excluded.
- Costs for utilities consumed during construction are excluded.
- All work to be performed during normal working hours.
- All Construction Proposals are only good for 30 days.
- Tolerances are +/- 1/8"

Project Specific Qualifications

- This Budget is based on Proposed Elevator Addition Bid Set, dated 04/09/2019
- This Budget is based on MEP Addendum, dated 04/30/2019, Proposed Elevator Addition Demo Plans, received 04/29/2019
- This Budget is based on Proposed Elevator Addition Project Manual, dated 04/09/2019
- This Budget is based on RFI Responses.
- The assumed onsite construction duration is **180** working days (**36** working weeks). See Schedule for specifics.
- This Budget assumes that this project is tax exempt.
- This Budget assumes normal business hours.
- This Budget assumes that the sidewalk along Westwood Road can be fenced in and used during construction.
- We have included waterproofing and topping slab in the Basement per the Architectural plans and sections. However, there are details that will need to be resolved; specifically at slab edge at the step down into the stair, at slab edge at new doors into the east wing, etc. A sump or drain may be desirable.
- This Budget excludes cost for new underslab drain piping or new perimeter foundation drain. These may be desirable for moisture control; however, they would need to discharge somewhere TBD.
- This Budget excludes cost for forming the sump pit or furnishing or installing a sump pump. Based on Stack's experience with Garaventa lifts, we do not believe a sump in the elevator will be required.

Allowances - Certain scopes of work (as described below) have been included as Allowances. If the cost of a specific selection is greater than the Allowance value, the contract value shall be increased accordingly, including markups for Contractor's Overhead + Profit. These Allowances are summarized here and detailed in the enclosed Budget Detail. If values / scope differ between this Summary and the Budget Detail, the value /scope in the Budget Detail shall govern.

- An allowance of \$26,630 is included for Site Logistics. This includes pedestrian barriers and temp fence (\$14,780), remove and replace the City Sidewalk (\$8,100), remove and reinstall pavers at parking spot (\$2,750), and removal of existing hedges along sidewalk on Westwood Road (\$1,000). This is based on the attached proposed Site Logistics plan. This plan will need to be reviewed and approved by all stakeholders including the Owner and Terrence Smith at Somerville Traffic prior to starting construction.
- An Allowance of \$15,000 (\$2,500 per Unit) is included to furnish and install cast stone pilasters
- An Allowance of \$1,500 is included for new beam pockets for the W8x31 beams.
- An Allowance of \$2,400 is included to enlarge the existing star landing
- An Allowance of \$10,500 is included for Kitchenette Casework/Counter and Reception Desk Materials
- An Allowance of \$3,250 is included for interior and exterior door hardware

ASSUMPTIONS AND QUALIFICATIONS

May 10, 2019

- An Allowance of \$2,500 is included to patch and repair existing board and plaster.
- An Allowance of \$6,714 is included to furnish tile and VCT flooring material.
- An Allowance of \$1,842 is included to furnish Bathroom accessories, Fire Extinguishers and Cabinets, and Restroom Signage.
- An Allowance of \$1,500 is included to furnish and install flooring in the elevator.
- An Allowance of \$3,750 is included to trench, patch and repair for underground plumbing.

Exclusions

- Upgrade / Repair existing system scheduled to remain - Masonry, trim Windows and doors, MEPs, etc.
- Quality Control and Testing
- Snow Removal
- Project Utility Usage
- Temporary toilets for Museum employees and visitors
- Remove / relocate furniture, items in storage, etc. Space expected to be cleared prior to construction start.
- Asbestos abatement / Hazardous materials, Unsuitable soils, rock/ledge/boulders
- Dewatering
- File, maintain, prepare SWPP
- Furnish new/replace sidewalk curbs - resuse existing
- Replace plants removed during construction, along Westwood Road
- Soil testing and changes to underpinning design due to results of Geotech Report, Soil treatment and compaction testing
- Concrete testing, Specialty Ad-Mixtures
- 7 day wet cure
- Structural steel testing / inspections, peer review, special inspections
- Radiused Lintels at Wood Shutters and Elevator Vent
- Vapor barrier behind GWB at exterior walls
- Furnish new wood trim for Westwood Road Elevation. Existing trim to be salvaged and reused
- Replace crown throughout - only patch in as necessary
- Spray foam or blown in cellulose insulation
- Furnish and install snow rails or snow guards
- Automatic door opener
- Level 5 finish at new drywall - level 4 finish carried
- Floor prep, self leveler and antifracture below tile, Moisture testing / mitigation, Crack membrane
- Stone Tile - Porcelain carried
- Furnish/install floor in Existing Reading Room, Reference Room, Accession Room, Short-Term Storage, Elevator Machine Room, all Stair Treads & Landings, Existing Gallery Space
- Polish / finish concrete floors not receiving tile
- Provide rubber stair treads, risers & landings, transition strips for VCT flooring
- Paint areas not included in Construction - Existing Gallery Spaces, Existing Reference, Existing Reading Room, Front of Museum, existing wood trim at ext. of building
- Paint stair treads, stringers, wood handrails
- Repair / replace water heater
- Furnish new or replace existing BMS systems
- Shut down fees

Stack + Co.

FIRM PROFILE

At Stack + Co. we utilize our unique and versatile staff to deliver architecture, construction management, and integrated services. We specialize in various forms of hybrid delivery, providing services across the entire project life-cycle in-house, or integrating with industry partners including architects, consulting engineers, and construction managers.

Stack + Co. provides construction management services in concert with top architecture and design firms, and our clients include some of the most successful operators in the hospitality, food and beverage, academic and commercial spaces. Founding Principal Josh Brandt has developed a recognized expertise in delivering high-quality, complex projects resulting in Stack + Co.'s robust referral driven client base.

Stack + Co.'s work has been celebrated in Architectural Record, Dwell, Design New England, Boston Home, and Green Building & Design and the Firm was awarded the "Best of Boston Home, Custom Home Design/Build" from Boston Home in 2019, New England Home magazine's "Rising Stars" in 2019, and "Best Design Build Firm" by Boston Architects in 2018.





CASE STUDY

Norfolk House Residences, Dedham, MA

Project Type: Historic Restoration/Multi-Family

A major restoration and development of 6 high-end condominiums in an 1802 landmark building listed on the National Register of Historic Places. Originally constructed as a country tavern, the building saw significant expansion and improvement in 1905 by renowned Colonial Revival architect Frank Chateau Brown, and again in 2015 when Stack + Co. teamed with developer Oxbow Partners and Horne and Johnson Architects to create 6 stunning residential units featuring period details and modern amenities. This project won a 2017 Adaptive Reuse and Rehabilitation Restoration Award from the Massachusetts Historic Commission.

Architecture: Horne and Johnson

Construction: Stack + Co.





CASE STUDY

Saint Norbert School Lofts, Jamaica Plain, MA
Project Type: Historic Restoration/Multi-Family

Located in Jamaica Plain, MA, Stack turned this former school into a 16,000 SF modern apartment complex. Composed of 21 modern studios and one bedrooms, each apartment is equipped with top of the line climate control systems, tall ceilings, in-unit laundry facilities, and an abundance of natural light. The project required intensive structural modifications and restoration to the projects existing historical conditions.

Architecture: RODE Architects
Construction: Stack + Co.





CASE STUDY

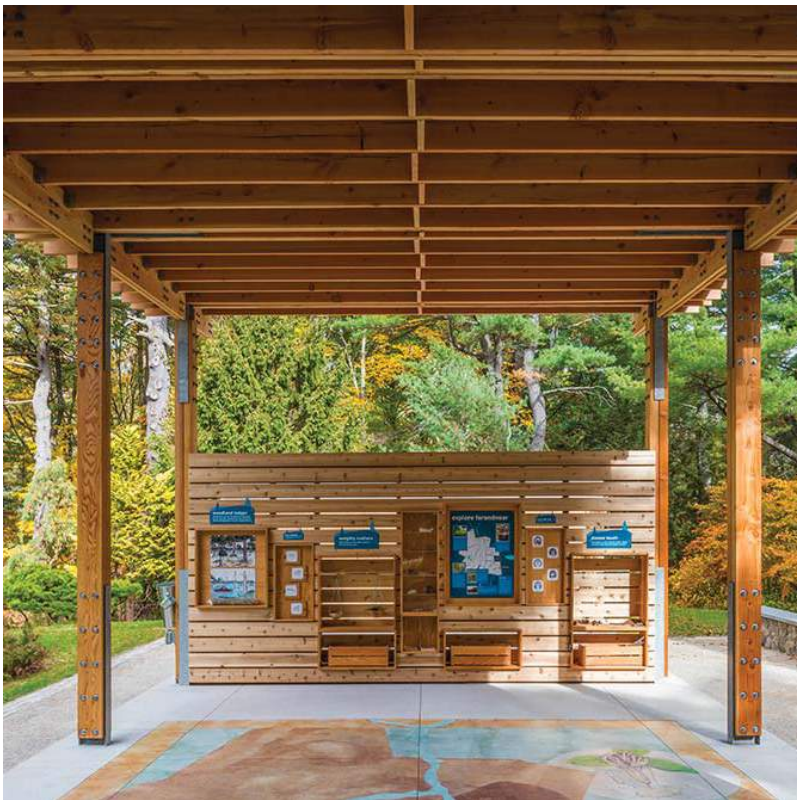
ICA Watershed, East Boston, MA
Project Type: Art Exhibition

Located in the East Boston Shipyard, the ICA Watershed provides 15,000 SF of dedicated installation art exhibition space for the Institute of Contemporary Art. An adaptive reuse of a WW2 era copper pipe factory, the project required the full reconstruction of the condemned building. Nonetheless, the ICA Watershed was executed on an accelerated fast track schedule with all work completed in 28 weeks.

The ICA Watershed is always free and represents the ICA's long term commitment to enriching the Boston arts community.

Architecture: Anmahian Winton Architects
Construction: Stack + Co.





CASE STUDY

Farandnear, Shirley, MA
Project Type: Outdoor Pavilion

Built for the Trustees of Reservations, this new pavilion is a welcoming center for the 89 acre Farandnear reservation in Shirley, MA. Also serving as a gathering area for venue events, the Farandnear Pavilion was constructed using an intricate system of structural steel nodes and exposed douglas fir timbers, features an eco-friendly rain water collection system and a custom painted structural slab that depicts a map of the reservation.

Architecture: designLAB Architects
Construction: Stack + Co.



CASE STUDY

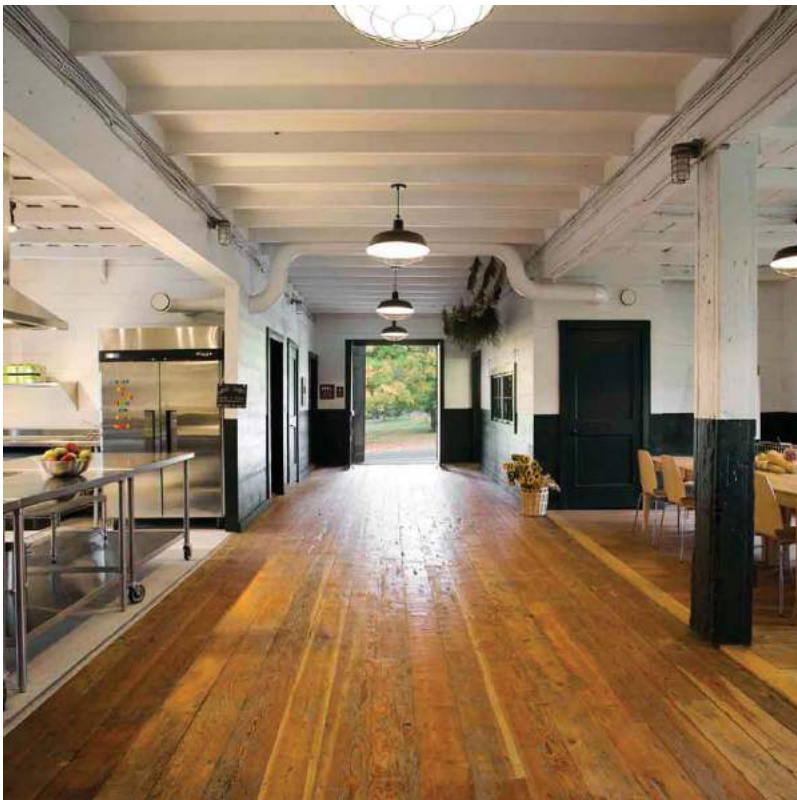
Powisset Farm, Dover, MA

Project Type: Deep Energy Retrofit

A deep-energy retrofit, built for the Trustees of Reservations; which included installation of super insulated walls, roof, and floor assemblies in the existing barn structure. Additionally, Stack installed a photovoltaic array system that ultimately makes the establishment net positive in terms of energy use. In addition to the deep energy retrofit scope, Stack constructed a full new commercial kitchen and classroom, where the staff will be initiating a new “farm to fork” CSA program for visitors.

Architecture: ZeroEnergyDesign

Construction: Stack + Co.



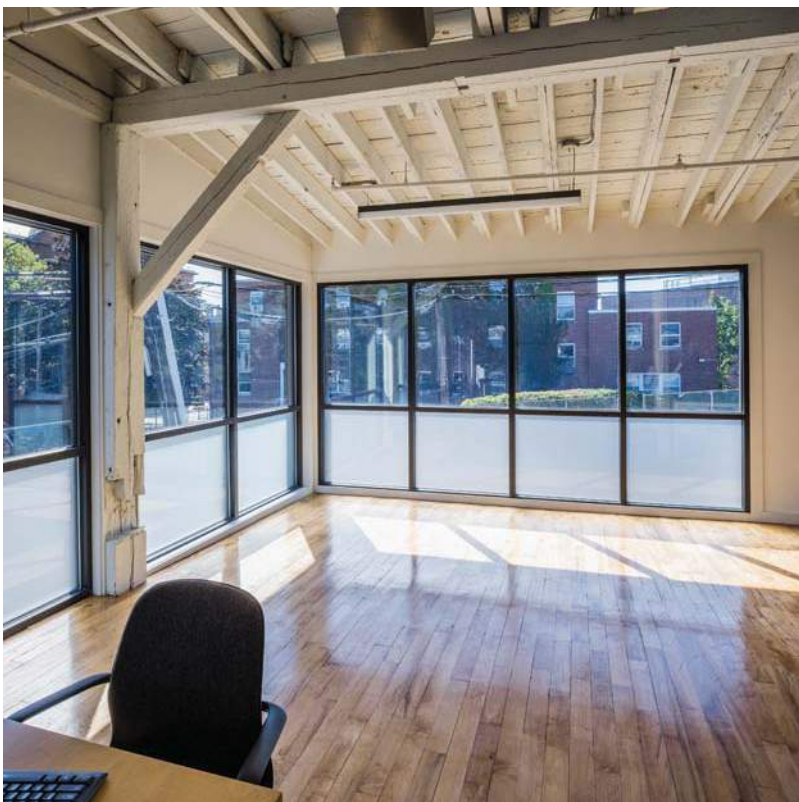


CASE STUDY

285 Washinton Street, Somerville, MA
Project Type: Office Building

The intensive renovation and repositioning of an existing 3 building office complex owned by Riverside Properties in Somerville. A new entry and lobby, bathrooms, windows, and retail storefronts take the building into the 21st century.

Architecture: Peter Quinn Architects
Construction: Stack + Co.





Joshua M. Brandt, LEED AP

Principal

Education

Bachelor of Science in Civil Engineering
Brown University

Registrations and Certifications

LEED Accredited Professional by the US
Green Building Council

Professional Affiliations

US Green Building Council Rhode Island
Chapter, Founding Member, 2009
Construction Rhode Island, Founding
Member, 2009
Urban Land Institute (ULI), East Boston
Development Wave, Speaker and Panelist,
2016
NAIOP (Commercial Real Estate
Development Association), Craft Beer Taps
Commercial Real Estate, Speaker and
Panelist, 2015
Member, Massachusetts Brewers Guild

Josh Brandt founded Stack + Co. in 2009 with Andrew Wade Keating out of the belief that a more cooperative and integrated approach to architecture and construction would deliver a better process and building. He is a recognized leader in the preconstruction and construction management of complex and demanding projects in the institutional, hospitality, commercial, and residential markets.

Josh excels at setting priorities based on each project's unique circumstances and not on previous project precedents as is so commonly done in the industry. He begins each new venture with a rigorous exploration of client needs and individual circumstances to develop a solution that best suits the demands of the project.

Prior to starting Stack + Co., he worked as a Construction Manager with Stonestreet Building Company where he worked on high-end luxury condominiums and as a Project Manager with Shawmut Design and Construction specializing in large institutional projects.

Relevant Experience

- Saint Norbert School Lofts, Jamaica Plain, MA
- Hopkinton Residence, Hopkinton, MA
- Gates Residence, Scituate, RI
- Parmalee Street Apartments, Boston, MA
- Appleton @ Davis, Somerville, MA
- Contemporary South End Townhouse, Boston, MA
- The Box Office, Providence, RI
- ICA Watershed, East Boston, MA



Casey Wilcox

Construction Project Manager

Education

Bachelor of Science in Civil Engineering
Rochester Institute of Technology (RIT)

Registrations

OSHA-30 Certification, Occupational
Safety and Health Administration, U.S.
Department of Labor
Certified Engineer in Training (E.I.T.)

Work History

2016 - Present - Stack + Co.
Project Manager
2013 - 2016 - Stack+ Co.
Assistant Project Manager
2010 - 2013 - The Pike Company, Ithaca, NY
Project Engineer

Casey is an integral member of the team at Stack + Co. and has served as Assistant Project Manager or Project Manager on many of the firm's projects. He has a meticulous attention to detail and excels at the management of highly complex and demanding construction projects. In 2016 Casey was promoted to Project Manager in recognition of his significant professional growth and outstanding contribution to the firm success. Prior to joining Stack, Casey served as a Project Engineer for a firm in upstate New York where he worked on the \$65,000,000 Cornell University Stocking Hall Food Science Laboratory and Production Dairy Facility.

Relevant Experience

- Norfolk House, Dedham, MA
- Saint Norbert School Lofts, Jamaica Plain, MA
- Laconia Lofts, Boston, MA
- ICA Watershed, East Boston, MA
- ICA Exhibition Buildout, East Boston, MA
- BKBX, Allston, MA
- Downeast Cider Preconstruction, East Boston, MA
- Mountain Warehouse, Boston, MA
- Cambridge Spirits, Cambridge, MA



Mike Ramos

Senior Superintendent

Registrations and Certifications

Massachusetts Construction Supervisor (CLS), Massachusetts Board of Building Regulations and Standards
OSHA-30 Certification, Occupational Safety and Health Administration, U.S. Department of Labor

Work History

2014 - Present - Stack + Co.
Project Superintendent
2004 - 2014 - Onyx Construction
Owner

Mike joined Stack + Co. in 2014 after operating his own construction firm for more than 10 years. His wealth of knowledge along with his calm and approachable predisposition has proven to be a tremendous asset to his clients. His reputation as a highly motivated, customer driven, and quality focused Superintendent has led Stack clients to request his involvement in their projects.

His experience includes the 15,000 square foot ICA Watershed which required full reconstruction of the condemned building, was executed on an accelerated fast track schedule and completed in 28-weeks.

Relevant Experience

- ICA Watershed, East Boston, MA
- Pammy's, Cambridge, MA
- Bon Me Fresh Pond, Cambridge, MA
- Bon Me Test Kitchen, Cambridge, MA
- Bon Me Chestnut Hill, Newton, MA
- Bon Me Congress Street, Boston, MA
- Downeast Cider, East Boston, MA
- 17 Caroline, Wellesley, MA

Norfolk House

Mr. Peter Smith
Developer
Peter Smith Associates
Telephone: 617-512-6489
Email: psmith@petersmithassociates.biz

Powisset Farm

Farandnear Pavilion

Mr. James Younger
Former Executive Director, The Trustees of Reservations
Principal
James M. Younger, AIA
Telephone: 978-397-4860
Email: jmy@jamesyoungeraiia.com

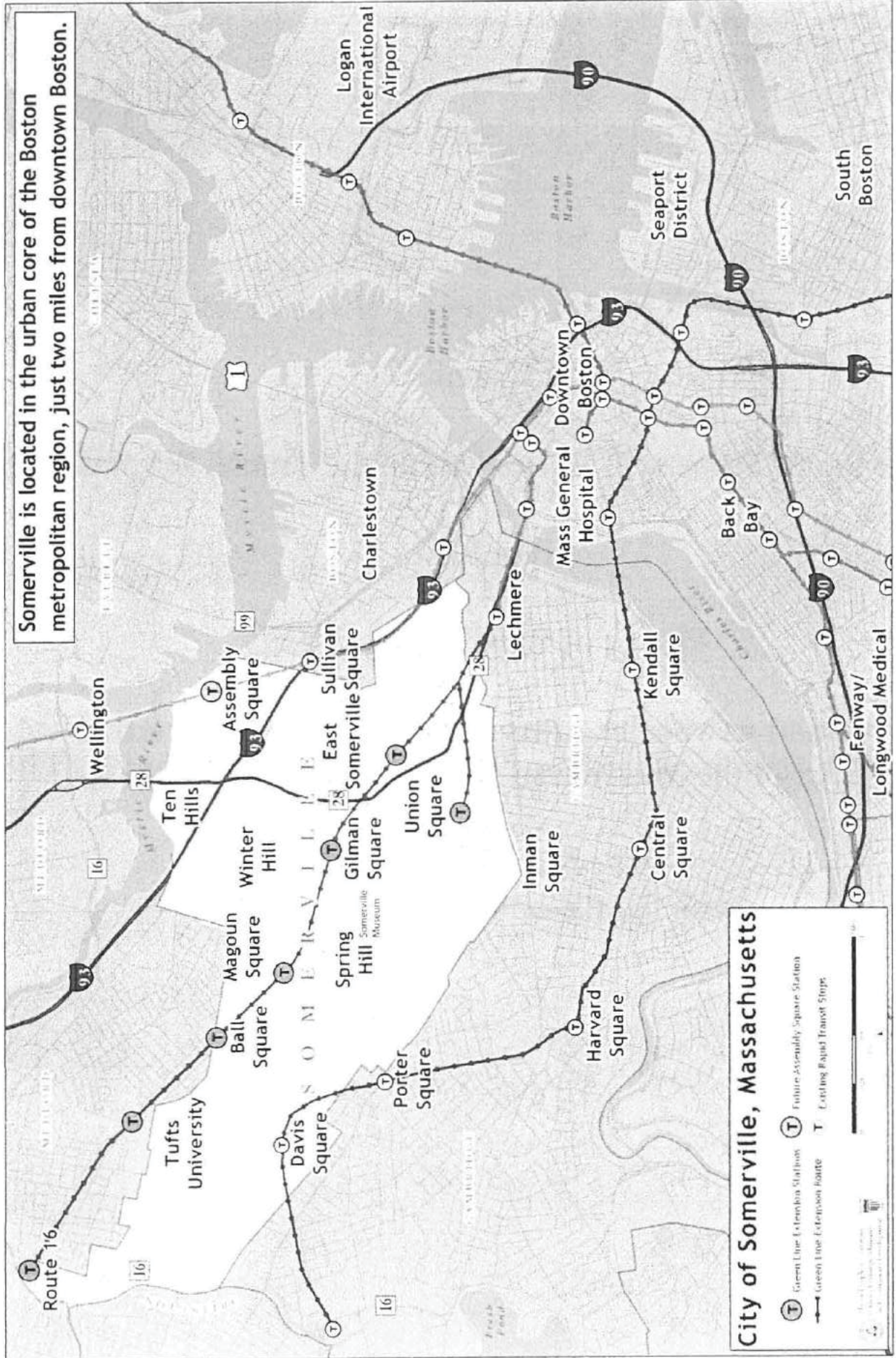
ICA Watershed

Ms. Jill Medvedow
Ellen Matilda Poss Director
Institute of Contemporary Art (ICA)
Telephone: 617-478-3100
Email: jmedvedow@icaboston.org

VISUAL

- Map of property location within the transit system
- Plot plan
- Photos of existing conditions

Somerville is located in the urban core of the Boston metropolitan region, just two miles from downtown Boston.

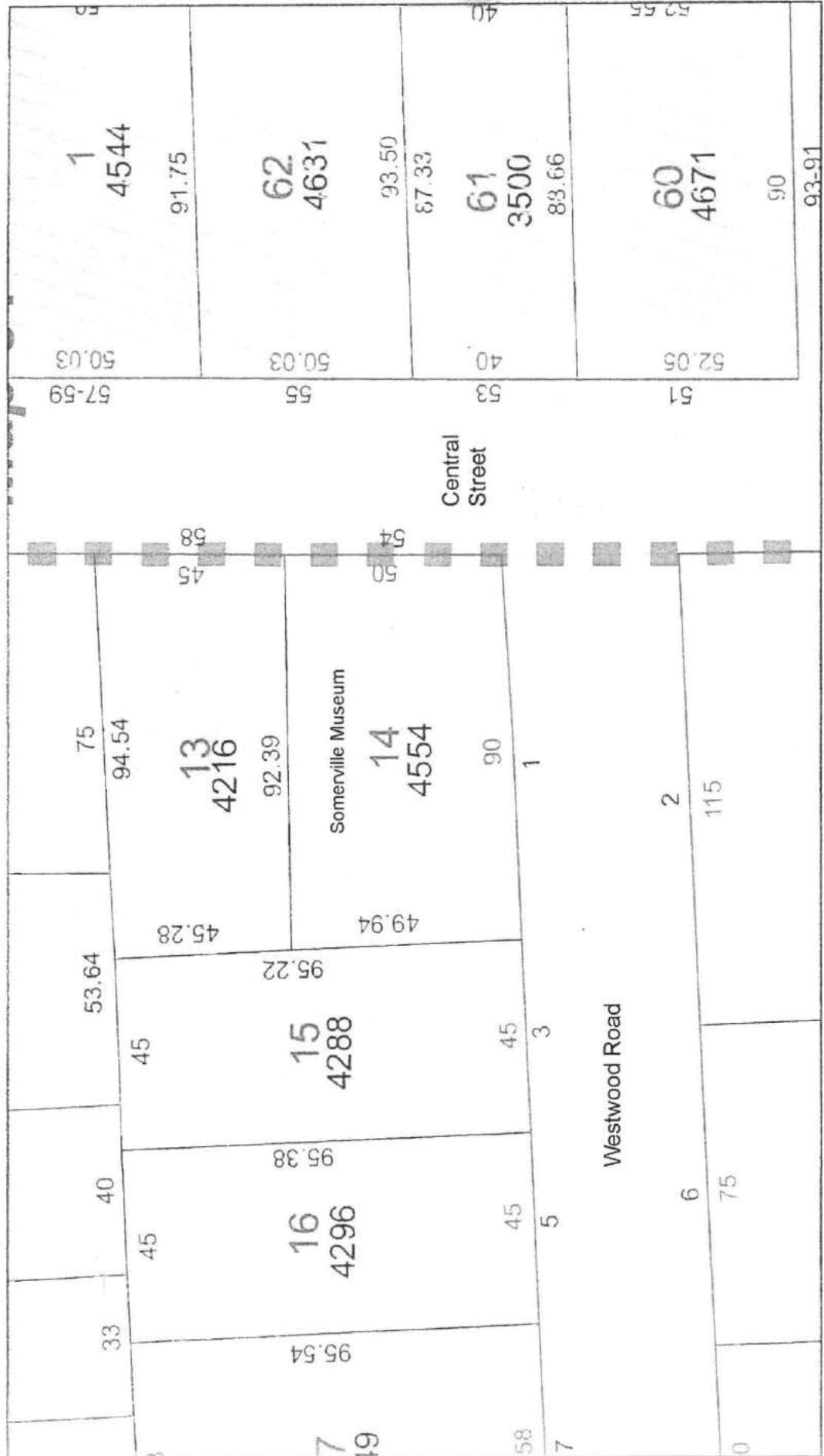


City of Somerville, Massachusetts

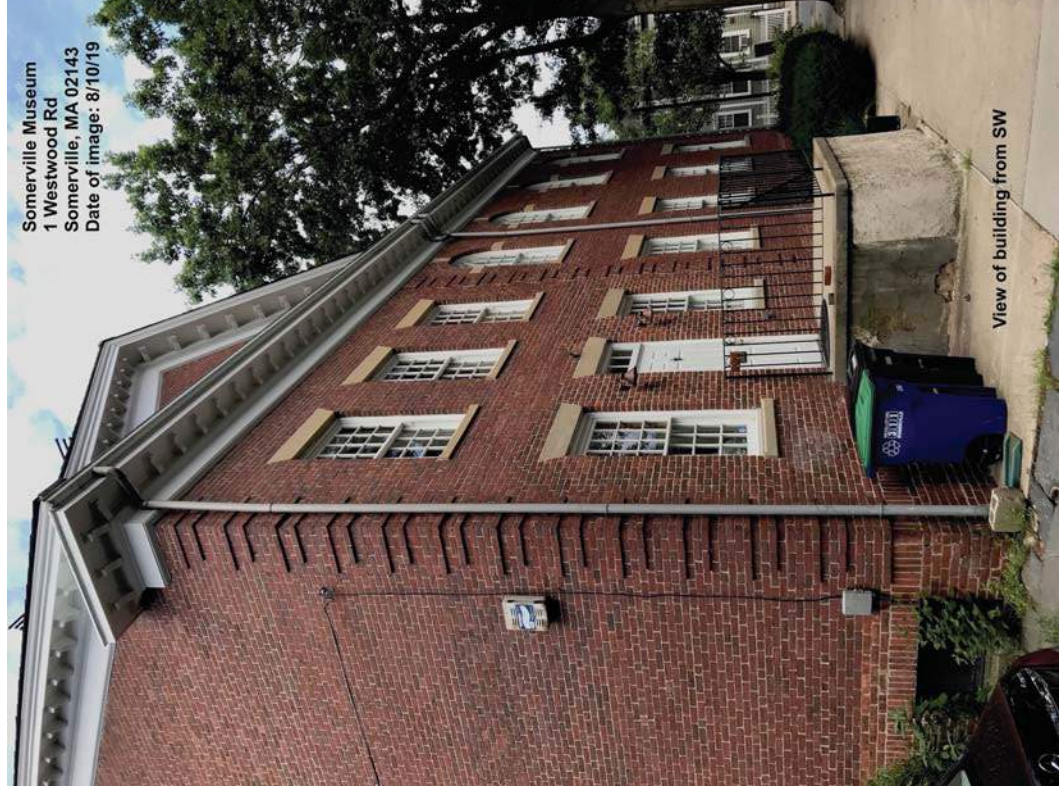
- Green Line Extension Station
- Future Assembly Square Station
- Green Line Extension Route
- Existing Rapid Transit Stops

Scale: 0 to 1/4 mile

Somerville Museum
 Plot Plan
 One Westwood Road, Somerville, MA



EXISTING CONDITIONS



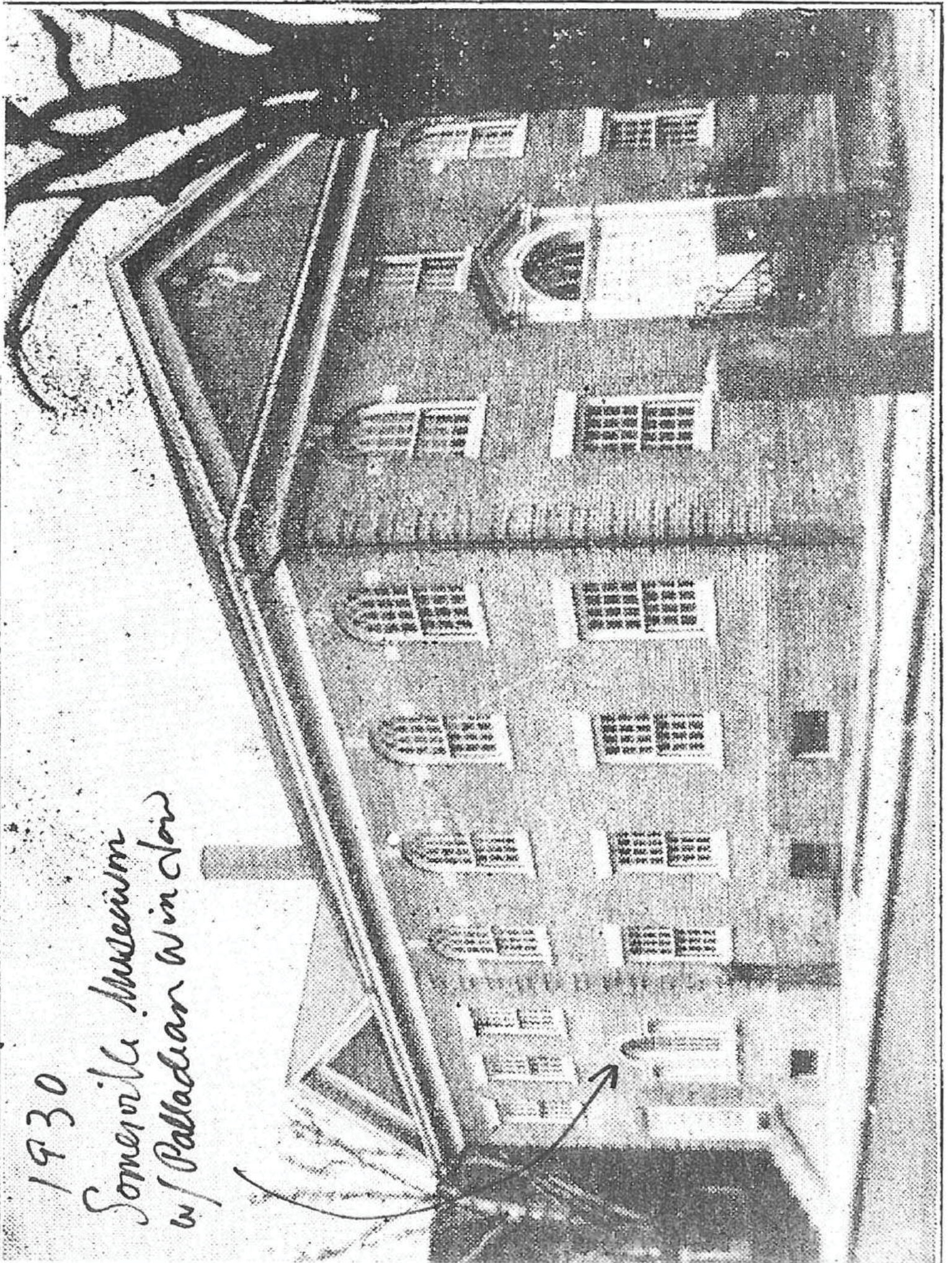


EXISTING CONDITIONS



1930

Somerville Museum
w/ Palladian Window



Proposed Portico

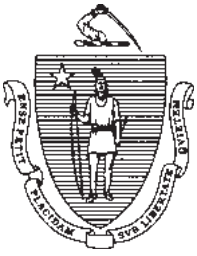


PROPOSED PORTICO



OWNERSHIP/ OPERATION

- Certificate of Good Standing
- 501(c)(3) certification
- Preservation restrictions
- Property deed



The Commonwealth of Massachusetts
Secretary of the Commonwealth
State House, Boston, Massachusetts 02133

William Francis Galvin
Secretary of the
Commonwealth

Date: February 19, 2019

To Whom It May Concern :

I hereby certify that according to the records of this office,

SOMERVILLE HISTORICAL SOCIETY

is a domestic corporation organized on **November 09, 1898**

I further certify that there are no proceedings presently pending under the Massachusetts General Laws Chapter 180 section 26 A, for revocation of the charter of said corporation; that the State Secretary has not received notice of dissolution of the corporation pursuant to Massachusetts General Laws, Chapter 180, Section 11, 11A, or 11B; that said corporation has filed all annual reports, and paid all fees with respect to such reports, and so far as appears of record said corporation has legal existence and is in good standing with this office.



In testimony of which,

I have hereunto affixed the

Great Seal of the Commonwealth

on the date first above written.

William Francis Galvin

Secretary of the Commonwealth

Certificate Number: 19020305220

Verify this Certificate at: <http://corp.sec.state.ma.us/CorpWeb/Certificates/Verify.aspx>

Processed by:

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: FEB 22 2012

SOMERVILLE HISTORICAL SOCIETY
ONE WESTWOOD RD
SOMERVILLE, MA 02143-1517

Employer Identification Number:
04-6079655
DLN:
17053325375001
Contact Person: MAXWELL SULLIVAN ID# 31696
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
March 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
August 15, 2010
Contribution Deductibility:
Yes
Addendum Applies:
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Lois G. Lerner
Director, Exempt Organizations

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

SOMERVILLE HISTORICAL SOCIETY

We considered and approved retroactive reinstatement under Notice 2011-43.



COMMONWEALTH OF MASSACHUSETTS
DEPARTMENT OF REVENUE
 PO BOX 7010
 BOSTON, MA 02204



403C
SOMERVILLE HISTORICAL SOCIETY
 1 WESTWOOD RD
 SOMERVILLE MA 02143-1517

Notice Date:	04/27/13
Taxpayer ID Number:	046 079 655

Dear Taxpayer,

Below please find your Certificate of Exemption (Form ST-2). Please cut along the dotted line and display at your place of business.

Sincerely,

Massachusetts Dept. of Revenue



Form ST-2
Certificate of Exemption

Massachusetts
Department of
Revenue

Certification is hereby made that the organization herein is an exempt purchaser under General Laws, Chapter 64H, section 6(d) or (e). All purchases of tangible personal property by this organization are exempt from taxation under said chapter to the extent that such property is used in the conduct of the business of the purchaser. Any abuse or misuse of this certificate by any tax-exempt organization or any unauthorized use of this certificate by any individual constitutes a serious violation and will lead to revocation. Willful misuse of this Certification of Exemption is subject to criminal sanctions of up to one year in prison and \$10,000 (\$50,000 for corporations) in fines. (See reverse side.)

SOMERVILLE HISTORICAL SOCIETY
1 WESTWOOD ROAD
SOMERVILLE MA 02143

EXEMPTION NUMBER
046 079 655
 ISSUE DATE
04/23/13
 CERTIFICATE EXPIRES ON
04/23/23

90

PRESERVATION RESTRICTIONS

11/17/86 09:05 TR 7 RE 10.00

The parties to this agreement are the COMMONWEALTH OF MASSACHUSETTS, by and through the MASSACHUSETTS HISTORICAL COMMISSION, which has an office at 80 Boylston Street, Boston, Massachusetts, 02116, hereinafter referred to as the Commission, and the Somerville Historical Society and any successor owner of the below-described premises, hereinafter referred to as the Grantor.

For good and valuable consideration the Commission imposes and the Grantor accepts the following preservation restrictions which shall be recorded with and affect those premises described in a certain deed dated January 25, 1922, from Adelbert B. Carpenter to the Somerville Historical Society, recorded with the Middlesex South Registry of Deeds at Book 4489, Page 435.

These preservation restrictions are set forth so as to ensure the preservation of the architectural and historical integrity of the Somerville Historical Museum, so called, located at One Westwood Road, Somerville, Massachusetts 02143, which premises have been listed on the State Register of Historic Places. Architectural and historical integrity shall be defined as those significant characteristics which originally qualified the building for entry in the State Register of Historic Places.

PRESERVATION RESTRICTIONS

1. Maintenance of Premises: The Grantor agrees to assume the total cost of continued maintenance, repair, and administration of the premises so as to preserve the architectural and historical integrity of the features, materials, appearance, workmanship, and environment for a period in perpetuity from the date of execution of this instrument in a manner satisfactory to the Commission. Nothing herein shall prohibit the Grantor from seeking financial assistance from any sources available to him.

2. Maintenance of Grounds: The Grantor agrees that the grounds around said building be maintained in a landscaped environment consistent with the historical character of the building. Nothing herein shall prohibit the parking on part of the premises of registered operating motor vehicles in use by the owner or occupants or visitors to the premises.

3. Inspection: The Grantor agrees that the Commission may inspect the premises from time to time during the length of the restrictions to ensure that the Grantor is in compliance with reasonable standards of maintenance and administration.

4. Alteration: The Grantor agrees that no alteration shall be made unless (a) clearly of minor nature and not affecting architectural and historical values, (b) the Commission has previously determined that it will not seriously

impair architectural and historical values after reviewing plans and specifications submitted by the Grantor, or (c) required by casualty or other emergency promptly reported to the Commission.

5. Other Provisions: The Palladian window, which will be crated and stored is to be reinstalled in a location approved by the Commission on the rear wall of the Somerville Historical Museum. Reinstallation of the window will occur at a future date when and if an elevator is installed in the Somerville Historical Museum.

IN WITNESS WHEREOF, the Grantor has hereunto set its hand and seal this 18th day of June, 1986.

SOMERVILLE HISTORICAL SOCIETY

By: Paul M. Kelley
Paul M. Kelley, President

COMMONWEALTH OF MASSACHUSETTS

Middlesex, SS

Then personally appeared the above-named Paul M. Kelley, the President of the Somerville Historical Society, and acknowledged the foregoing instrument to be the free act and deed of said Society, before me.

June 18, 1986

Regina H. Pisci
Notary Public
My Commission expires: 1/26/90

to be recorded herewith. We agree that all furnaces, heaters, ranges, and electric light fixtures, and all other fixtures of whatever kind and nature at present contained in said buildings or hereafter installed therein are to be considered as annexed to and forming a part of the freehold, that we will keep all the insurance upon the buildings now or hereafter standing on said premises for the benefit of and first payable in case of loss to the holder of this mortgage after satisfying the holder of the prior mortgage, and shall keep said buildings insured against fire for a sum satisfactory from time to time to such holders, and will keep all the policies for such insurance deposited with such holders; that we will not commit or suffer any violation of any law or ordinance affecting the mortgaged premises; that in default thereof we will on demand pay to such holder all such sums as she shall reasonably pay for taxes, insurance and other assessments; that if the debt secured hereby shall not be paid when due, the holder hereof shall be entitled to thirty days' notice in writing before payment unless foreclosure proceedings have been begun; that in case any default in the condition of this mortgage or said prior mortgage shall exist for more than thirty days the entire mortgage shall become due at the option of the holder hereof; that in case of a foreclosure sale the holder hereof shall be entitled to retain one per cent. of the purchase money in addition to the costs, charges, and expenses allowed under the statutory power of sale, and in case proceedings to foreclose have been begun, the holder of this mortgage shall be entitled to collect all costs, charges and expenses, up to time of payment. This mortgage is upon the statutory condition, for any breach of which the mortgagee shall have the statutory power of sale. WITNESS our hands and seals this twenty sixth day of January A.D. 1922. Richard Keushkerian (seal) Mrs. Lucy Keushkerian (seal) COMMONWEALTH OF MASSACHUSETTS. Middlesex ss. January 26, A.D. 1922. Then personally appeared the above named Lucy Keushkerian and acknowledged the foregoing instrument to be her free act and deed, before me, William J. Kurth, Justice of the Peace. - - - - - Middlesex ss. Jan. 26, 1922. 10h. 40m. A.M. Rec'd & Recorded.

I, Adelbert B. Carpenter, of Somerville, Middlesex County, Massachusetts, for consideration paid, grant to Somerville Historical Society a corporation duly established by law and having an usual place of business in said SOMERVILLE, with WARRANTY COVENANTS, the land in said SOMERVILLE, bounded and described as follows:- A certain parcel of land, being

CARPENTER
to
SOMERVILLE
HISTORICAL
SOCY.

Stamps
33.00
A.P.C.
Jan. 25,
22

lot one (1) on a plan of land in SOLERVILLE owned by Fannie I. Bradshaw and Reuben P. Benton, George A. Kimball, surveyor, dated September 12, 1894, and recorded with Middlesex South District Deeds at end of Book 2318, and bounded: beginning at the corner of Central Street and Westwood Road and thence running northeasterly by Central Street fifty (50) feet to land formerly of Charlotte M. Carpenter; thence turning and running Northwesterly by land of said Charlotte M. Carpenter, ninety two and 39/100 (92.39) feet to land now or formerly of Elizabeth D. Sibley, thence turning and running Southwesterly by land of said Elizabeth D. Sibley, forty nine and 94/100 (49.94) feet to Westwood Road and thence turning and running Southeasterly by Westwood Road, ninety (90) feet to the point of beginning. Containing forty five hundred and fifty four (4554) square feet. Being the same premises conveyed to me by deed of Fannie I. Bradshaw, dated July 14, 1902, and recorded with said Deeds Book 2979, Page 191. Said premises are conveyed subject to the following restrictions which shall be and remain in force for the term of ten (10) years from the date hereof; no permanent building shall be erected or placed on said premises within twenty (20) feet of said Central Street nor within five (5) feet of the house lot next adjoining on said Central Street. I, Edith E. Carpenter, wife of said grantor, release to said grantees all rights of DOWER AND HOMESTEAD and other interests therein. WITNESS our hands and seals this twenty fifth day of January 1922. Adelbert B. Carpenter (seal) Edith E. Carpenter (seal) COMMONWEALTH OF MASSACHUSETTS. Middlesex ss. January 26, 1922. Then personally appeared the above named Adelbert B. Carpenter and acknowledged the foregoing instrument to be his free act and deed, before me, Edwin D. Sibley, Justice of the Peace. My commission expires March 25, 1925. - - - Middlesex ss. Jan. 26, 1922. 11h. 23m. A.M. Rec'd & Recorded.

Assignment B316223 P546

HOLIAN
to
EAS. CAMBRIDGE
SAVS. BK.

KNOW ALL MEN BY THESE PRESENTS, that I, Helen Holian, single woman, of Cambridge, Middlesex County, Massachusetts, for consideration paid, hereby grant to the East Cambridge Savings Bank, a corporation organized under the laws of the Commonwealth of Massachusetts and having its usual place of business in Cambridge, County of Middlesex, said Commonwealth, with MORTGAGE COVENANTS, to secure the payment of twenty hundred dollars in one year with interest thereon at the rate of six per centum per annum, payable quarterly on the first days of March, September and December in each year at the office of said Bank in Cambridge, as provided in a certain note of even date herewith, and

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COMMONWEALTH OF MASSACHUSETTS
MIDDLESEX, S.S. 3/23/12
SOUTH DIST. REGISTRY OF DEEDS
CAMBRIDGE, MA

I HEREBY CERTIFY THE FOREGOING
IS A TRUE COPY OF A PAPER.
RECORDED IN:

BOOK 4489 PAGE 435-436

Eugene C. Brune
REGISTER

COMMUNITY SUPPORT

These have been submitted with previous grant applications; the project hasn't changed and so the letters and support are still relevant

- Letter of support from the Somerville Open Studios

- Joint letter of support from Representatives

Denise Provost, Timothy Toomey and Christine Barber

December 1, 2015

To Whom it May Concern,

We are writing this letter in support of the Somerville Museum, who has been an invaluable partner for Somerville Open Studios for over 15 years.

The Somerville Museum has hosted the Artist's Choice Show for Somerville Open Studios for many years. The Artist's Choice Show features the work of over 200 Somerville artists and is the best opportunity for the community to preview the work before the SOS event weekend. The Somerville Museum's central location is an ideal unifying location, which not only draws in the art interested public, but then leaves them with a sincere appreciation for the lovely, light filled, historic space, that is a treasure for Somerville.

We view the Somerville Museum as a valuable partner in the community, but it is imperative that SOS event locations be inclusive and accessible to all, which is why we support the Somerville Museum's efforts to make the space ADA compliant.

Everyone should be able to appreciate the wonderful resource that is the Somerville Museum.

Thank you,

Gena Folts, Somerville Open Studios Coordinator 2016

Suzanne Lubeck, Somerville Open Studios Board of Directors, President



The Commonwealth of Massachusetts
House of Representatives
State House, Boston 02133-1054

TIMOTHY J. TOOMEY, JR.
STATE REPRESENTATIVE
26TH MIDDLESEX DISTRICT
SOMERVILLE - CAMBRIDGE
ROOM 238, STATE HOUSE
TEL: (617) 722-2380
FAX: (617) 722-2847
Timothy.Toomey@MAhouse.gov

COMMITTEES:
VICE CHAIR, REVENUE

December 1, 2015

The Honorable Michael A. Capuano, Chairman
Somerville Community Preservation Committee
93 Highland Avenue
Somerville, MA 02143

RE: Somerville Museum's Application for CPA Funds

Dear Chairman Capuano,

We are writing in support of the Somerville Museum's application for funds under the Community Preservation Act. If funded, this grant will allow the Museum to accomplish what has been a major challenge over the past several years: the installation of an elevator in the building that will meet the requirements of the Massachusetts Architectural Access Board. Once installed, the building will comply with the standards set by the American Disabilities Act (ADA), and be accessible for all.

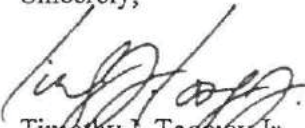
The Museum is currently compromised in its role as an important public venue because it is unable to accept federal funding, such as grants from the Institute of Museum and Library Services, the National Endowment of the Arts, and the National Endowment for the Humanities if it is not ADA compliant. These funds are critical to the Museum's future as a cultural resource.

On the other hand, with the ADA work completed, the future is bright. The Museum has revitalized its Board of Trustees, has updated its strategic plan, and greatly succeeded in fundraising, community participation and membership growth, through its project to replace the original slate roof. Since 2011, the Museum has raised over \$555,000 for this and other related projects, such as repair of the Museum's exterior windows and weatherization of the interior. There is a new Advisory Board bringing more energy and ideas to the museum for exhibitions, programming, and for making the collections more accessible to all. The City of Somerville is an arts-oriented community, and having the Museum host such activities is a big draw for cultural tourism.

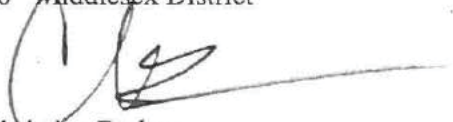
The Museum's elegant interior with its 1792 Bulfinch staircase makes it a perfect location for musical performances, lectures, exhibitions and more. However, the Museum cannot fund these projects without the help of programs such as the Community Preservation Act. The Museum is supported by membership dues, has a very small endowment at present, and receives no regular City funding. The Somerville Museum is asking for approximately \$375,000 in CPA funds, which will go towards the design and construction of an addition and elevator, to conduct an inventory of the historical collections (needed for the next phase), to secure the collections with updated security equipment and cameras, and to support the work of designing the next phase of the Museum's capital strategic plan – climate control and updated access and storage of collections. With the help of the CPA, the Somerville Museum will be transformed into a great 21st Century cultural institution that serves the people of Somerville well.

Thank you for your consideration on this matter, and we sincerely hope the Community Preservation Committee will look favorably upon this request.

Sincerely,



Timothy J. Toomey Jr.
26th Middlesex District



Christine Barber
34th Middlesex District



Denise Provost
27th Middlesex District

HISTORIC RESOURCES

- Massachusetts Historical Commission (MHC) Inventory Form 2013
- Photos of current property conditions

FORM B – BUILDING

Assessor's Number USGS Quad Area(s) Form Number

MASSACHUSETTS HISTORICAL COMMISSION
MASSACHUSETTS ARCHIVES BUILDING
220 MORRISSEY BOULEVARD
BOSTON, MASSACHUSETTS 02125

Map 43, Block F, #14	Boston North	AT, AP, AY	Smv.14
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LHD 3/11/1985, NRMRA 9/18/1989, NRDIS 9/18/1989, PR 11/14/1986

Town/City: Somerville

Place: (*neighborhood or village*): Westwood Road
Local Historic District

Address: 1 Westwood Road, Somerville, MA 02143

Historic Name: Somerville Historical Society (SHS)

Uses: Present: Cultural Center and Museum

Original: SHS meeting place and library

Date of Construction: 1925-1929

Source: Carole Zellie, Landscape Research, 1980
Gretchen Schuler. MHC. 1988

Style/Form: Federalist

Architect/Builder: William Dykeman

Exterior Material:

Foundation: Stone

Wall/Trim: Brick/Wood

Roof: Slate

Outbuildings/Secondary Structures: none

Major Alterations (with dates): 1986: The rear entrance was remodeled. 2012: Slate roof replaced with North Country Black slate; all copper replaced with copper; wooden elements repaired or replaced in kind.

2013: Exterior wooden windows, doors and trim repaired,

Condition: (Exterior): Good

Moved: no yes **Date:**

Acreeage: less than 1 acre

Setting: residential

Photograph



Locus Map



Somerville Museum is #14 on the 'F' block.

Recorded by: Barbara Mangum, President of the Trustees

Organization: Somerville Museum

Date (month / year): July, 2013

INVENTORY FORM B CONTINUATION SHEET

SOMERVILLE

1 WESTWOOD ROAD

MASSACHUSETTS HISTORICAL COMMISSION

220 MORRISSEY BOULEVARD, BOSTON, MASSACHUSETTS 02125

Area(s) Form No.

AT, AP, AY	Smv.14
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Recommended for listing in the National Register of Historic Places.

If checked, you must attach a completed National Register Criteria Statement form.

Use as much space as necessary to complete the following entries, allowing text to flow onto additional continuation sheets.

ARCHITECTURAL DESCRIPTION:

Describe architectural features. Evaluate the characteristics of this building in terms of other buildings within the community.

The Museum building is a two-story Federal Revival building, executed in red brick, with brick quoins at the corners of the museum. A line of quoins defines a flat pavilion at the rear of the Westwood façade. This façade has its own enclosed pediment above the continuous cornice. A slate roof, whose ridge runs front to back covers the building. The front façade has an enclosed pediment, with a circular window in the middle. The centrally placed double entry doors on Central Street are surmounted by a fanlight with interlaced mullions and has a Federal Revival pedimented surround. Two square-headed 12/12 double-hung windows flank the entry. The second floor of the Central Street façade has an 8/8 double-hung window over the entry and is flanked by two round-headed double-hung windows with interlaced mullions. The two long sides have four bays of double-hung windows running back from the front façade. The upper windows have round heads, while the first floor windows have square heads. The rear of the Northside wall is blank, while the rear pavilion on the Westwood façade has three bays. A single-leafed door is centered in the first floor of the pavilion and is flanked by two square-headed windows. Three square-headed windows are arranged above these openings on the second floor. The rear façade has an open pediment, with the main cornice returning across the rear quoins. There are six off-center, 8/8 double-hung windows on this facade. The lower windows each have a short transom.

The main exhibition hall of the Museum includes Charles Bulfinch's "Flying Double Staircase," which Bulfinch had designed for the Joseph Barrell Mansion (later the McLean Asylum) in 1792. The Society acquired the staircase from the Shaw family of Wayland in the late 1940's, after the Shaws had saved it from demolition in 1892. The front doors, steps and foyer, which formed the original entry to the Museum are from the City's original public library built by George Loring. The main entry was changed to the Westwood Road door in 1986. Before this change, the first floor of the rear pavilion contained a door in the last bay and a small Palladian window to its right. The Palladian window was removed and the current configuration was built. The slate roof was replaced with new slates in 2012. The Central St. doors were painted green in the late 1980s and were scraped and painted white in the restoration that occurred in 2013, in which the windows were also repainted.

The Museum is situated within the Westwood Road Historic District. The street is lined with intact late 19th to early 20th century high quality architect-designed, Shingle Style, Queen Anne, and Colonial Revival houses. Of the twenty-one homes in the district (excluding the outbuildings), nearly all were designed for single-family use. A variety of original materials are still evident including shingles, fieldstone, leaded glass, and wrought iron work.

HISTORICAL NARRATIVE

Discuss the history of the building. Explain its associations with local (or state) history. Include uses of the building, and the role(s) the owners/occupants played within the community.

This building is the home of the Somerville Historical Society, renamed the Somerville Museum in 1986. In 1897, a group of professionals, businessmen, religious, social, cultural, educational and municipal leaders came together to found the Somerville Historical Society. Many of these founding members were descendants of the original settlers.

Continuation sheet 1

INVENTORY FORM B CONTINUATION SHEET

SOMERVILLE

1 WESTWOOD ROAD

MASSACHUSETTS HISTORICAL COMMISSION

Area(s) Form No.

220 MORRISSEY BOULEVARD, BOSTON, MASSACHUSETTS 02125

AT, AP, AY	Smv.14
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They donated their private archives and historical artifacts to the Society and met and published papers, called the "Historical Leaves" recalling their earlier experiences. These have proven over time to be an invaluable asset to the Museum. Between 1925 and 1929, the building was built as place for the members to meet and organize their artifacts and library. The Museum is the only cultural facility constructed by the community since its founding as a town in 1842, and remains a unique institution to this day supported by its members.

The Museum changed its focus (and name) in 1986 to accommodate and encourage the development of arts and culture in Somerville, as well as history. The Somerville Museum now presents exhibitions featuring local visual arts, history and culture in the context of neighborhoods and community, as well as musical and dramatic performance series; develops hands-on history learning projects in collaboration with the Somerville Public School Department; and is available as a meeting place for local historical and cultural organizations.

BIBLIOGRAPHY and/or REFERENCES

Somerville Historical Society, *Historic Leaves: Society Members, 1898 to 1908*.

Dykeman, William, *Plans for the Somerville Historical Society (blueprints)*, (1925).

Fuller, Constance B., Lee, Jeffrey E., *Massachusetts Preservation Projects Fund Project Completion Report* (1986).

Schuler, Gretchen G., *Massachusetts Inventory Form-B* (September, 1988).

INVENTORY FORM B CONTINUATION SHEET

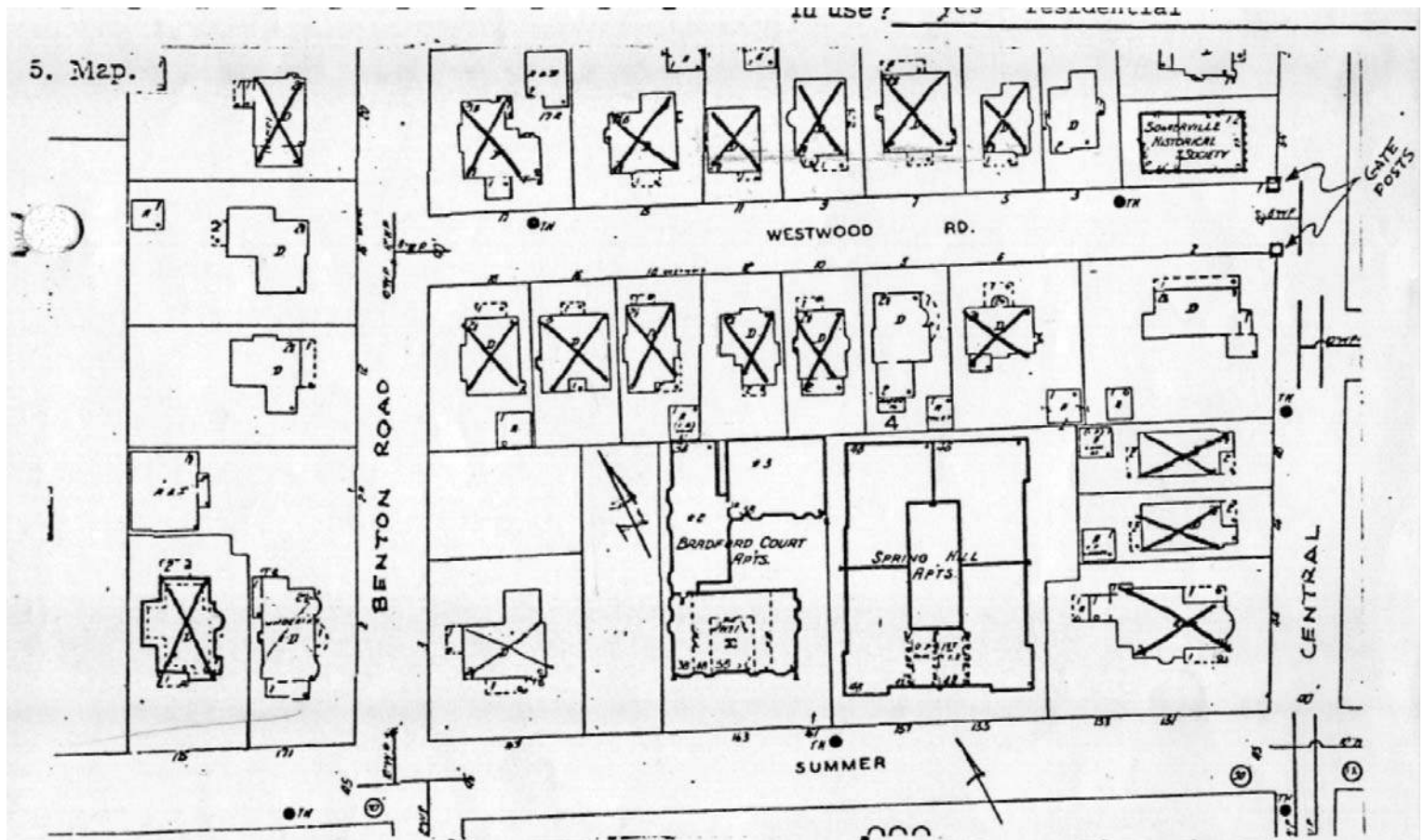
SOMERVILLE

1 WESTWOOD ROAD

MASSACHUSETTS HISTORICAL COMMISSION
220 MORRISSEY BOULEVARD, BOSTON, MASSACHUSETTS 02125

Area(s) Form No.

AT, AP, AY	Smv.14
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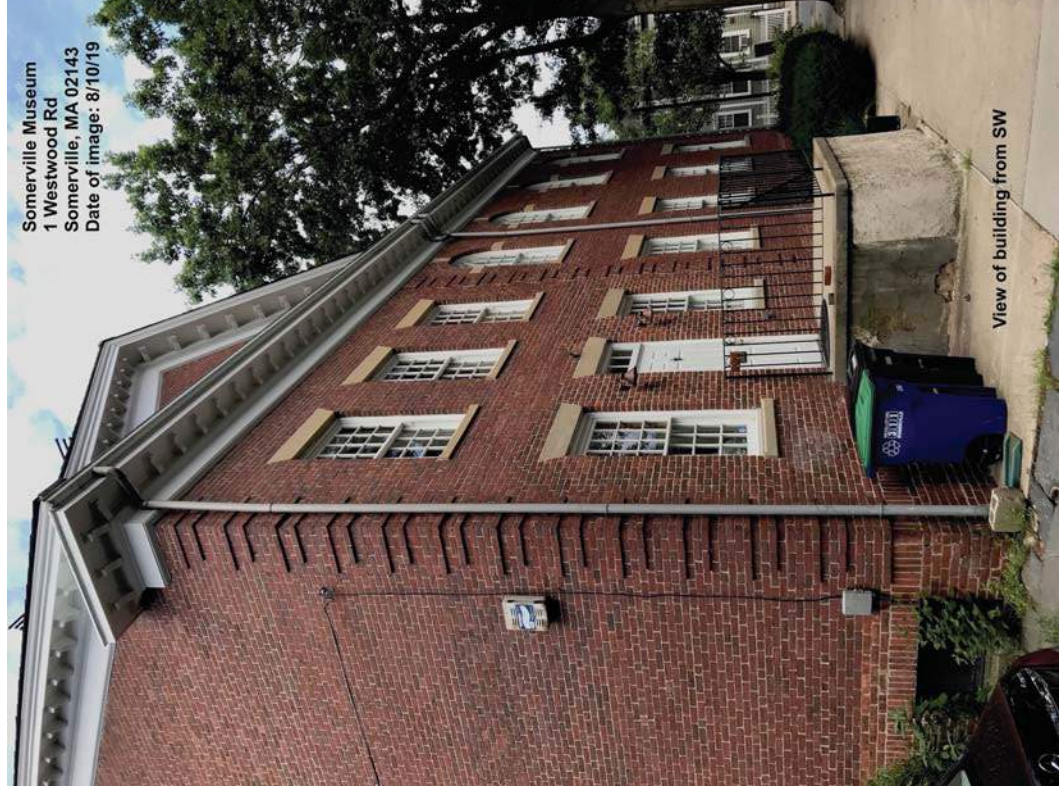


Assessor's Plan from 1985 showing the location of the Somerville Historical Society building, now the Somerville Museum within the locus of the Westwood Rd. Historic District.

EXISTING CONDITIONS



EXISTING CONDITIONS



Somerville Museum
1 Westwood Rd
Somerville, MA 02143
Date of image: 8/10/19

View of building from SW

PLANS + REPORTS

- Building Code Reports (ADA)
(included: Original Report 2011 (digital version only) and Revised Report 2015)

- MAAB letters (3 total)

DIGITAL VERSIONS (available upon request)

- Peter Quinn Architects, Plans and Elevations (July 2016)
- Peter Quinn Architects, Bid Set (July 2016)
- Peter Quinn Architects, Project Manual (April 2019)



TO: Barbara Magnum, Chair Somerville Museum Board of Trustees
FR: A. Vernon Woodworth FAIA, AKF Group
RE: Somerville Museum Accessibility
AKF Project No. B150222-000
DT: 9/22/15



INTRODUCTION

This memo reviews the accessibility requirements of the Rules and Regulations of the Massachusetts Architectural Access Board (521 CMR). While the Somerville Museum is also subject to the requirements of the Americans with Disabilities Act (ADA), this Federal legislation is not enforced by the local Building Official or the Mass. AAB.

"All additions to, reconstruction, remodeling, and alterations or repairs of existing public buildings or facilities, which require a building permit or which are so defined by a state or local inspector, shall be governed by all applicable subsections in 521 CMR 3.00: JURISDICTIONS." (521 CMR 3.3)

"If the work being performed costs less than \$100,000, then only the work being performed is required to comply with 521 CMR. If the work costs \$100,000 or more, then the work being performed is required to comply, and, in addition, an accessible public entrance and an accessible toilet room,



Re: Somerville Museum Accessibility
AKF Project No. B150222-000

telephone and drinking fountain (if toilets, telephones and drinking fountains are provided) shall also be provided in compliance with 521 CMR." (521 CMR 3.3.1)

An exception states that "whether performed alone or in combination with each other, the following types of alterations are not subject to 521 CMR 3.3.1, unless the cost of the work exceeds \$500,000 or unless work is being performed on the entrance or the toilet:

- a) Curb cuts
- b) Alteration work which is limited solely to electrical, mechanical, or plumbing systems, to abatement of hazardous materials; or retrofit of automatic sprinklers and does not involve the alteration of any elements or spaces required to be accessible under 521 CMR. Where electrical outlets and controls are altered, they must comply with 521 CMR.
- c) Roof repair or replacement, window repair or replacement, repointing and masonry repair work.
- d) Work relating to septic system repairs, site utilities and landscaping."

If the work performed, including the exempted work, amounts to 30% or more of the full and fair cash value of the building the entire building is required to comply with 521 CMR. (521 CMR 3.3.2)

When the work performed on a building is divided into separate phases or projects or is under separate building permits, the total cost of such work in any 36 month period shall be added together in applying 521 CMR 3.3, Existing Buildings. (521 CMR 3.5)

The City of Somerville Assessing database describes the assessed value of the Somerville Museum located at 1 Westwood Rd. as \$1,050,100. 30% of this amount is \$315,030. If this amount is spent in any three-year period the building will be required to be fully accessible in accordance with 521 CMR. Note that the exempt items described above for the \$100,000 threshold are not exempt from the calculation of the 30% threshold.

An historic building or facility that is listed or is eligible for listing in the National or State Register of Historic Places or is designated as historic under appropriate state or local laws may be granted a variance by the Board to allow alternate accessibility. If a variance is requested on the basis of historical significance, then consultation with the Massachusetts Historical Commission is required in order to determine whether a building or facility is eligible for listing or listed in the National or State Register of Historic Places. The Massachusetts Historical Commission may request a copy of the proposed variance request and supporting documentation to substantiate the variance request and its effect on historic resources. A written statement from the Massachusetts Historical Commission is required with the application for a variance. (521 CMR 3.9)

The requirements described below apply only if work is performed either on the elements described, or as triggered by the thresholds described above.



Re: Somerville Museum Accessibility
AKF Project No. B150222-000

ACCESSIBLE ROUTE

The Somerville Museum is located on a street corner with public entrances on both streets. The public sidewalk is compliant for running and cross slope along both sides of the building. There is no off-street parking associated with the Somerville Museum.

PUBLIC ENTRANCES

All public entrances of a building or tenancy within a building must be accessible. Public entrances do not include entrances that serve solely as service entrances, loading entrances, or entrances restricted to employee use only (521 CMR 25.1). The approach to an accessible entrance must be a paved walkway or ramp that is uninterrupted by steps. Entrances must have a level landing on the interior and exterior of the entrance doors (521 CMR 25.2).

Between any two hinged or pivoted doors there must be a minimum of 48 inches plus the width of any door swinging into the space (521 CMR 25.3). This applies to all doors in series and vestibules.

Neither public entrance to the Somerville Museum is currently accessible. While plans to install an elevator have been developed for the side entrance, the historic character of the front entrance would be compromised by a lift or a ramp. There are interior as well as exterior steps at this location, and a vestibule which is not compliant with the requirements for doors in series. The handrail in the picture below can be retrofitted with a compliant handrail and an additional compliant handrail added on the far wall.

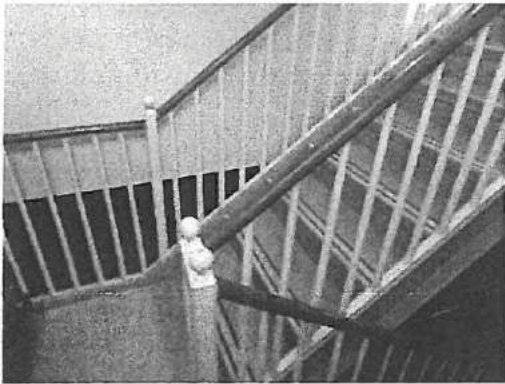




Re: Somerville Museum Accessibility
AKF Project No. B150222-000

STAIRS

Stairways shall have continuous handrails at both sides of all stairs. The inside handrail on switchback or dogleg stairs shall always be continuous (521 CMR 27.4.1). Where handrails terminate at the top and bottom of a stair run, they shall have extensions that comply with the following: a. At the top extend at least 12" beyond the top riser and parallel with the floor or ground surface. a. At the bottom extend at least 12" plus the width of one tread beyond the bottom riser. The handrail shall continue to slope for a distance of the width of one tread from the bottom riser, the remainder of the extension shall be horizontal. c. Handrail extensions need not extend if it would cause a safety hazard or if space does not permit. (521 CMR 27.4.3)



The exterior stair handrail at the side entrance and the new interior stair handrails do not have the required extensions. The new interior stair handrails are also not continuous without interruption. This condition can be corrected with the installation of new continuous handrails with extensions. The "Bulfinch" Stair is not available for use and should be considered more as an historical artifact than a means of circulation.

SIGNAGE

Signage is required to be installed only when the 30% threshold is reached. Where permanent identification is provided for rooms and spaces, signs must be installed on the wall adjacent to the latch side of the door. Where there is no wall space to the latch side of the door, including at double leaf doors, signs shall be placed on the nearest adjacent wall (521 CMR 41.2). Signs must be mounted in a location that allows a person to approach within three inches of the signage without encountering protruding objects or standing within the swing of a door (521 CMR 41.2.1). Mounting height must be 60 inches when measured vertically from the floor to the centerline of the sign (521 CMR 41.2.2).

Letters and numerals on signs must be raised from the background. The background must be of an eggshell, matte, or other non-glare finish. Characters and symbols must contrast with the background (521 CMR 41.5.1 & 41.6). The sign must also include Braille to accompany all letters and/or numerals on the sign (521 CMR 41.5.2).



Re: Somerville Museum Accessibility
AKF Project No. B150222-000

In a building where not all entrances or toilet and bathing facilities are accessible, the accessible entrances and bathing facilities must be provided with signage with the International Symbol of Accessibility (521 CMR 41.1.3).

Accessible signage can be installed indicating the locations of the accessible entrance and other accessible features.

PUBLIC TOILET ROOMS

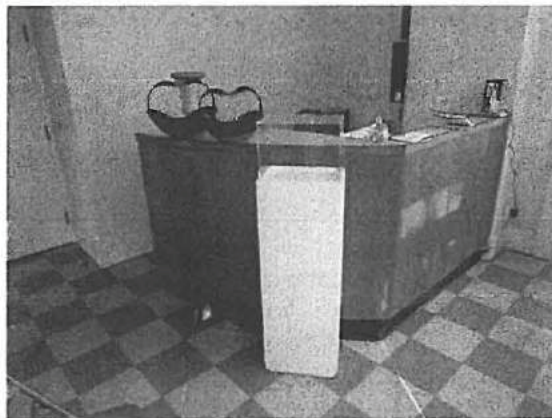
Where public toilet rooms are provided in a building, at least one water closet and one sink in each location must be accessible (521 CMR 30.1.a). Otherwise, a separate accessible unisex toilet room must be provided at each location. The installation of a unisex toilet room in lieu of a fully accessible men's and women's room is permitted, provided it is located in the same area as the other toilet rooms (521 CMR 30.1.1 & 30.2). Accessible toilet rooms must be located along an accessible route. Accessible toilet rooms must comply with 521 CMR 30.00.

An accessible public toilet room can be provided at the first floor. There are no restrooms on the mezzanine and the basement currently is provided with partially accessible restrooms for both men and women that can be adapted to achieve full compliance.

SERVICE COUNTERS

Where a counter is present in building or location where services are provided, a portion of the counter or an auxiliary counter must be accessible. The accessible portion must be located along an accessible route. The accessible portion of the counter or auxiliary counter must be at least 36 inches in length and have a height not exceeding 36 inches above the finished floor (521 CMR).

The counter of the reception desk at the Somerville Museum exceeds 36" in height. An accessible reception desk can be provided.





Re: Somerville Museum Accessibility
AKF Project No. B150222-000

DOOR WIDTH

All doorways and openings that are required to be accessible shall have a clear opening of not less than 32" (521 CMR 26.5).

Both doors from the "Great Room", one of which leads to the reception area and the other of which leads to a smaller gallery exhibit space, are less than 32" in clear width (31"). New doors and frames can be installed with compliant widths.

DOOR HARDWARE

Handles, pulls, latches, locks, and other operating devices on accessible doors shall have a shape that is easy to operate with one hand and that does not require tight grasping, tight pinching, or twisting of the wrist to operate (521 CMR 26.11.1).

All door hardware in the Somerville Museum is noncompliant. The existing hardware on doors required for public access will be removed and replaced with accessible hardware.

MANEUVERING CLEARANCES

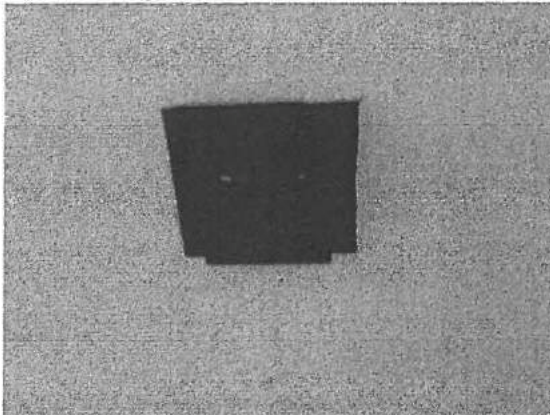
A minimum clear floor area shall be provided on both sides of all doors and gates (521 CMR 26.6). This clear area differs for "push" versus "pull" sides, and is exempted for doors equipped with automatic door opening devices (521 CMR 26.6).

The required maneuvering clearances are missing at several locations within the Somerville Museum, including both doors leading from the reception area into the remainder of the building. These can be corrected with the installation of automatic door openers.

FIRE ALARM NOTIFICATION

Where fire alarm notification appliances are provided, the visual alarm signals must have photometric features in accordance with NFPA 72 – the National Fire Alarm and Signaling Code (521 CMR 40.3.2). NFPA 72 requires a clear lens and no longer permits the installation of frosted strobes.

The fire alarm notification devices do not meet the requirements of NFPA 72. These can be upgraded.





Re: Somerville Museum Accessibility
AKF Project No. B150222-000

HEADROOM

Walks, halls, corridors, passageways, aisles, or other circulation spaces shall have a minimum of 80" clear headroom. If vertical clearance of an area adjoining an accessible route is reduced to less than 80", a barrier shall be provided to warn blind or visually impaired persons of reduced headroom. (521 CMR 20.7)

The area under the "Bulfinch" stair has headroom of less than 80" and requires a 'cane detection' barrier. This can be provided.



VARIANCES

Based on our audit of this building we recommend that variances be sought from the Architectural Access Board for the following items:

1. Front entrance, including vestibule (521 CMR 25.00 and 20.00)
2. Bulfinch stair, including nosings, uniform treads and risers, and handrails (521 CMR 27.0)





Somerville Museum
One Westwood Road
Somerville, Massachusetts 02143
(617) 666-9810

Evelyn Battinelli, Exe. Director
Barbara Mangum, President
Stephen Mackey, Vice-President
Lawrence Willwerth III, Secretary
Dyan Blewett, Treasurer
Mayor Eugene Brune
Prof. David Guss
Michael Dacey
Regina Pisa, Esq.
City Counselor William White

June 28, 2019

Architectural Access Board
One Ashburton Place, Room 1310
Boston, MA 02108

Attn: Mr. William Joyce, Compliance Officer

Re: Somerville Museum

Dear Mr. Joyce:


As agreed to at our recent meeting with the AAB, this letter provides a description of current and future compliance with 521 CMR for the Somerville Museum located at 1 Westwood Road in Somerville, MA. A previous letter from the Museum Board to the AAB described our efforts to provide full accessibility beyond the variances previously granted. Now that the legal challenges to our efforts have been dismissed, the Museum expects to be moving rapidly forward in accordance with the following:

- The initial application anticipated triggering the 30% threshold for full accessibility with the cost of the new accessible entrance and prior roof repairs. Because this application was filed more than 36 months ago and because the new entrance has yet to be permitted the building has yet to trigger the requirement for full accessibility.
- The intent is to construct an elevator addition to include a new accessible grade level entry and a four-stop elevator that provides access to the basement where the restrooms are located, as well as to the main first floor level and to the small second floor office level. The Museum is working to have funds in place to begin construction later this year, at which time full compliance with 521 CMR will be required.
- As of the date of this letter all interior doors which are not provided with compliant maneuvering clearances will be propped open during Museum hours of operation.
- Upon completion of the new accessible entrance the Museum will undertake to make the existing public restrooms fully accessible (see current and proposed plans attached).

We believe that this approach meets the full intent of 521 CMR. We would like to thank the Board for their patience as the long process of reaching this point has played out. Our intent is to keep the Board fully informed until the work described above is completed.

Please let me know if you have any questions regarding these matters. I can be reached directly at bmangum411@aol.com or 617-331-7726.

Sincerely yours,

A handwritten signature in black ink, appearing to read "Barbara Mangum". The signature is fluid and cursive, with a long horizontal stroke at the end.

Barbara Mangum
President of the Board

cc: FPC
cc: AKF
cc: PQA



CHARLES D. BAKER
GOVERNOR

KARYN E. POLITO
LIEUTENANT GOVERNOR

MIKE KENNEALY
SECRETARY OF HOUSING AND
ECONOMIC DEVELOPMENT

**Commonwealth of Massachusetts
Division of Professional Licensure
Architectural Access Board**

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EDWARD A. PALLESCHI
UNDERSECRETARY OF CONSUMER
AFFAIRS AND BUSINESS
REGULATION

DIANE M. SYMONDS
COMMISSIONER, DIVISION OF
PROFESSIONAL LICENSURE

COMMONWEALTH OF MASSACHUSETTS

SUFFOLK, ss.

**ARCHITECTURAL ACCESS BOARD
Docket No. V15-194**

_____)
In re)
)
Somerville Museum)
1 Westwood Street)
Somerville)
_____)

BOARD DECISION

Procedural History

This matter was originally before the Architectural Access Board ("Board") based on an Application for Variance submitted, pursuant to 521 CMR¹ 4.00, by Peter S. Quinn, AIA, authorized representative of the Somerville Historical Society (the "Petitioner"), and received by the Board on July 17, 2015. The application sought a variance from the requirements of 521 CMR 28.12.3 (LULA² specifications).

The Board initially reviewed the application on August 10, 2015 and voted to deny a variance for the proposed LULA because it determined that the Petitioner had not established impracticability as required under 521 CMR 5.00. The Board also voted to require the Petitioner to meet with Board staff to discuss the project. The written Notice of Action was issued on August 12, 2015.

Following discussions with Board staff, the Petitioner submitted an updated request which was received on November 12, 2015. Therein, it noted a new plan with a straight on/straight off LULA design and also added the following sections of 521 CMR in its request for relief: 25.3 (vestibules); 26.5 (door width); 26.6 (maneuvering clearance); 27.2 (stair treads and

¹ Code of Massachusetts Regulations.

² I.e. limited use and limited application elevators. Cf. G.L. c. 143, § 71E.

risers); 27.4.1 (handrail location); 27.4.3 (handrail extensions); 30.00 (public toilet rooms); and 41.1.3 (signage). The Board reviewed the updated information on November 30, 2015 at which time it voted to grant variances as requested, with the exception of the requests for the lack of maneuvering clearances at existing doors (521 CMR 26.6) and the lack of compliant toilet rooms (521 CMR 30.1). Regarding these two latter issues, the Board granted the Petitioner until July 1, 2016 to submit a plan for compliance or additional variance requests, having found insufficient evidence of impracticability to warrant full variances for them. The written Notice of Action was issued on December 23, 2015.

On March 18, 2019, the Board received correspondence from the Petitioner's director, Barbara Mangum, wherein she requested an extension to the July 1, 2016 action date previously ordered. Because of the Petitioner's failure to meet that prior date, the Board scheduled a hearing on the matter which was held on May 20, 2019 in accordance with M.G.L. c. 30A, §§ 10 and 11; 801 CMR 1.02 *et seq.*; and 521 CMR 4.00. All interested parties were provided the opportunity to testify and present evidence to the Board. The following individuals appeared on the Petitioner's behalf: A. Vernon Woodworth, AIA; Ms. Mangum; Richard Graf, RA, project manager; and Katrina Sousa of Peter Quinn Architects. Also appearing were Michael Muehe of the Boston Center for Independent Living and William Joyce, the Board's compliance officer. The witnesses were sworn in by the Board Chair. The instant decision now memorializes the determinations made at that time.

Applicable Laws & Regulations

Pursuant to 521 CMR 3.3.2, "[i]f the work performed, including the exempted work, amounts to 30% or more of the *full and fair cash value* (see **521 CMR 5[]**) of the *building* the entire *building* is required to comply with 521 CMR."

Per 521 CMR 3.9, "[a]n historic *building* or *facility* that is listed or is eligible for listing in the National or State Register of Historic Places or is designated as historic under appropriate state or local laws may be granted a *variance* by the *Board* to allow alternate accessibility. If a variance is requested on the basis of historical significance, then consultation with the Massachusetts Historical Commission is required in order to determine whether a building or facility is eligible for listing or listed in the National or State Register of Historic Places. The Massachusetts Historical Commission may request a copy of the proposed variance request and supporting documentation to substantiate the variance request and its effect on historic resources. A written statement from the Massachusetts Historical Commission is required with the application for variance."

521 CMR 25.3 mandates that, "[b]etween any two hinged or pivoted doors, there shall be a minimum of 48 inches (48" = 1219mm) plus the width of any door swinging into the space."

— With respect to doorway width, 521 CMR 26.5 states that "[a]ll doorways and openings that are required to be *accessible* shall have a *clear* opening of not less than 32 inches (32" = 813mm). *Clear* opening of a door is measured from the face of the stop on the latch side to the face of the door when the door is open 90 degrees. For door types such as bifold, accordion, and pocket, the *clear* opening is measured when the door is in its most fully open position."

Per 521 CMR 26.6, “[a] minimum *clear* floor area shall be provided on both sides of all doors and gates. Exception: Doors equipped with automatic opening devices are exempt from 521 CMR 26.6.3, 26.6.4 and 26.8.”

521 CMR 27.2 requires that, “[o]n any given flight of stairs, all steps shall have uniform riser heights and uniform tread widths. Open risers are not permitted.”

521 CMR 27.4 requires that handrails “shall have the following features: 27.4.1 Location: Stairways shall have continuous handrails at both sides of all stairs. The inside handrail on switchback or dogleg stairs shall always be continuous. 27.4.2 Height: Top of handrail gripping surface shall be mounted between 34 inches (34” = 864mm) and 38 inches (38” = 965mm) above stair nosings. Handrails shall be measured vertically from the top of the gripping surface of the handrails to the stair nosing. 27.4.3 Extensions: Where handrails terminate at the top and bottom of a stair run, they shall have extensions that comply with the following: a. At the top, extend at least 12 inches (12” = 305mm) beyond the top riser and parallel with the floor or ground surface. ... b. At the bottom, extend at least 12 inches (12” = 305mm) plus the width of one tread beyond the bottom riser. The handrail shall continue to slope for a distance of the width of one tread from the bottom riser; the remainder of the extension shall be horizontal. ... c. Handrail extensions need not extend if it would cause a safety hazard or if *space* does not permit. Extensions shall comply with **521 CMR 20.6, Protruding Objects**. 27.4.4 Size: Handrails shall have a circular cross section with an outside diameter of 1¼ inches (32mm) minimum and two inches (51mm) maximum. 27.4.5 Shape: The handgrip portion of the handrail shall be round or oval in cross-section. 27.4.6 Surface: The gripping surface shall be continuous so that a hand can move from end to end without interruption by newel posts or other obstructions, and shall be free of any sharp or abrasive *elements*. 27.4.7 Clearance: When a handrail is mounted adjacent to a wall, the *clear space* between the handrail and the wall shall be 1½ inches (1½” = 38mm). Handrails may be located in a wall recess if the recess is a maximum of three inches (3” = 76mm) deep and extends at least 18 inches (18” = 457mm) above the top of the rail.”

Pursuant 521 CMR 28.1, “[i]n all multi-story buildings and facilities, each level including mezzanines, shall be served by a passenger elevator. If more than one elevator is provided, each passenger elevator shall comply with 521 CMR 28. Accessible elevators shall be on an *accessible route* and located within the *space* with which it is intended to serve.”

521 CMR 28.12 and its subsections describe the various requirements related to platform lift devices, including general requirements for *accessible routes* (28.12.1), vertical wheelchair lifts (28.12.2), limited use elevators (28.12.3), inclined wheelchair lifts in lieu of elevators along *accessible routes* (28.12.4), and inclined wheelchair lifts generally (28.12.5). In particular, 521 CMR 28.12.3 requires that “[l]imited use elevators shall comply with the following: a. The cab size shall be a minimum of 36 inches wide by 60 inches deep (36” by 60” = 914mm by 1524mm) with the door opening on the 36 inch (36” = 914mm) side. b. The interior elevator door or gate shall be automatic. c. The exterior doors shall comply with **521 CMR 26.00: DOORS AND DOORWAYS**. d. The elevator meet all other requirements of **521 CMR 28.2 through 28.6** and **521 CMR 28.8 through 28.11.**”

Regarding public toilet rooms generally, 521 CMR 30.1 states that “[e]ach public toilet room provided on a *site* or in a *building* shall comply with 521 CMR. a. In each adult public toilet room, at least one water closet and one sink in each location shall be *accessible* to persons in wheelchairs, or a separate *accessible* unisex toilet room shall be provided at each location. Adult water closets shall comply with the provisions of **521 CMR 30.1 through 30.13.**”

Finally, signage requirements are explicated in 521 CMR 41.00. Particularly, per 41.1, “[s]igns that designate permanent rooms and *spaces* shall comply with **521 CMR 41.2, 41.5 and 41.6.** These include toilet room signs, room numbers, stair signs, etc.” 41.1.1. Additional requirements are noted in 41.1.2 and 41.1.3. Also, the section includes specifications relating to character proportion, stating that “[l]etters and numbers on signs shall have a width-to-height ration between 3:5 and 1:1, and a stroke-width-to-height ration between 1:5 and 1:10.” 41.3.

Exhibits

The following documentation was entered into evidence:

- Exhibit 1: Board Packet AAB 1-56, including the Application for Variance, correspondence, building plans, photographs and related documentation.
- Exhibit 2: Revised proposed plans (40 pages), dated April 9, 2019, produced by Peter Quinn Architects.

Factual Findings

The following findings of fact and conclusions of law are supported by substantial evidence, based on the credited testimony of the witnesses, documents admitted into evidence and AAB records. M.G.L. c. 30A, § 11(2), § 14(7).

- 1) The subject building includes a basement and two stories above grade. AAB 53.
- 2) The building has a total approximate area of 7,068 ft² including 2,356 ft² per floor. AAB 53.
- 3) The building is listed on the National Register of Historic Places and the State Register of Historic Places and is located in a registered historic district. AAB 53.
- 4) The total anticipated construction costs, including work performed in the 36 months preceding initial filing of the application, is \$243,000. AAB 54.
- 5) The building’s assessed value at the time of the submission of the application was \$471,800. AAB 54.
- 6) Few interior doors have clearances that comply with 521 CMR 26.6, including both doors leading from the reception area into the building. AAB 19, 21, 34, 35.
- 7) Existing restrooms do not comply with 521 CMR 30.1. AAB 18, 22, 33.

Discussion

The Board’s jurisdiction is established pursuant to 521 CMR 3.3.2, which states that, “[i]f the work performed, including the exempted work, amounts to 30% or more of the *full and fair cash value* (see **521 CMR 5[]**) of the *building* the entire *building* is required to comply with 521 CMR.” At an estimated cost of \$243,000, the proposed renovations are significantly more than 30% of the full and fair cash value of the building (i.e. \$471,800 x 30% = \$141,540). Consequently, the entire facility must be brought into full compliance with the applicable requirements of 521 CMR. The Petitioner concedes that the Board had jurisdiction.

However, pursuant to 521 CMR 4.1, an “owner or an owner’s representative or tenant who thinks that full compliance with 521 CMR is *impracticable* may apply to the Board for a *variance* from 521 CMR.” Impracticability is defined to mean either that compliance with 521 CMR “would be technologically unfeasible” or that it would “result in excessive and unreasonable costs without any substantial benefit to persons with disabilities.” 521 CMR 5.00. Further, 521 CMR 3.9 states that “[a]n historic *building* or *facility* that is listed or is eligible for listing in the National or State Register of Historic Places or is designated as historic under appropriate state or local laws may be granted a *variance* by the Board to allow alternate accessibility.”

As noted above, the Board previously issued an order granting the Petitioner until July 1, 2016 to submit a plan for compliance with respect to maneuvering clearances at existing doors (521 CMR 26.6) and public toilet rooms (521 CMR 30.1). However, only on March 18, 2019 did it receive correspondence requesting additional time for such a submittal. Therein, Ms. Mangum explained that the Petitioner’s failure to abide by the Board’s order was because of “a number of factors, primarily being that the Museum was sued by its abutting neighbors ... to stop construction of the elevator addition on September 12, 2016. The Museum is run by volunteers and in order to address the lawsuit and save money on plans that might not be built, the Museum Trustees decided to stop all work associated with the building project until the outcome of the lawsuit was determined. This meant that we were unable to avail ourselves of the professional advice of our architects ... as well as our code consultant”

At the hearing, Ms. Mangum added that the Petitioner’s failure to timely submit the required materials was due to simple oversight. Once the Petitioner realized that it had missed the deadline, it acted in good faith by contacting the Board to address the issue and seek a remedy. Ms. Mangum further noted that the Petitioner has now modified its prior plans and is in process of seeking bids in order to proceed with renovations, including the necessary compliance. As those bids that it has already received are higher than anticipated, it now seeks additional time from the Board to address the two currently non-accessible conditions.

The Board considers the Petitioner to have failed to comply with its prior order. However, it finds Ms. Mangum’s testimony credible and concludes that the Petitioner’s failure was based upon a misunderstanding of its responsibilities to the Board. The error is not irremediable and the Board appreciates the Petitioner’s proaction in advising it of the lapse. Given the Petitioner’s continued willingness and inclination to comply with the regulations and to ensure accessibility for persons with disabilities, additional time should be provided in this particular circumstance.

Conclusion and Order

In light of the foregoing, the Board votes as follows:

- to **GRANT** the Petitioner until the close of business on Monday, July 1, 2019 to submit a plan for compliance or, alternatively, additional variance requests with respect to the lack of maneuvering clearances at existing doors (*cf.* 521 CMR 26.6, as noted in AAB 21) and the lack of compliant toilet rooms (*cf.* 521 CMR 30.1, as noted in AAB 22).
- the Board reserves its right to review this matter as necessary.

A true copy attest, dated: May 28, 2019

ARCHITECTURAL ACCESS BOARD

By:



Walter White, Chair



Jane Hardin, Vice Chair



Raymond Glazier, Executive Office of Elder Affairs, Designee



Jeffrey Dougan, Massachusetts Office on Disability, Designee



Patricia Mendez, Member

Andrew Bedar, Member (Not present)



Dawn Guarriello, Member

Harold Rhodes, Member (Not present)

David Johnson, Member (Not present)

A complete administrative record is on file at the office of the Architectural Access Board.

This constitutes an order of the Architectural Access Board. In accordance with M.G.L. c. 30A, §14 and M.G.L. c. 22, §13A, any person aggrieved by this decision may appeal to the Superior Court of the Commonwealth of Massachusetts within thirty (30) days of receipt of this decision.



CHARLES D. BAKER
GOVERNOR

KARYN E. POLITO
LIEUTENANT GOVERNOR

JAY ASH
SECRETARY OF HOUSING AND
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CHARLES BORSTEL
COMMISSIONER, DIVISION OF
PROFESSIONAL LICENSURE

THOMAS HOPKINS
EXECUTIVE DIRECTOR

AMENDED NOTICE OF ACTION

Docket Number V15 194

RE: Somerville Museum, 1 Westwood Road, Somerville

- An application for variance was filed with the Board by Peter S. Quinn, AIA (Applicant) on July 17, 2015.
- The applicant has requested variances from the following sections of the 2006 Rules and Regulations of the Board:
- | <u>Section:</u> | <u>Description:</u> |
|-----------------|---|
| 26.6 | Petitioner proposes to hold all doors with noncompliant clearances open during any time the Museum is open to public use. |
- The submittal was reviewed by the Board on Monday, July 29, 2019
 - After reviewing all materials submitted to the Board, the Board voted as follows:

GRANT relief to 26.6 as proposed in the Petitioner's July 12, 2019 submission.
submit a plan for compliance or additional variance requests for those two variances requested.

Any person aggrieved by the above decision may request an adjudicatory hearing before the Board within 30 days of receipt of this decision by filing the attached request for an adjudicatory hearing. If after 30 days, a request for an adjudicatory hearing is not received, the above decision becomes a final decision and the appeal process is through Superior Court.

cc: Local Building Inspector, Local Disability Commission,
Independent Living Center

Walter White T.H.

Chairperson, Architectural Access Board

Date: December 23, 2015

Amended 7/29/19

MATERIALS

- Polystone (lifetime warranty)
- Pella Architect Series Windows
(this can be reviewed online at:
<https://www.pella.com/windows/double-hung-windows/architect-series/>)

*These will be approved first by the SHPC



CHADSWORTH COLUMNS



POLYSTONE® COLUMNS – WARRANTY

LIMITED LIFETIME WARRANTY

Chadsworth's 1.800.COLUMNS® warrants our PolyStone® Columns to be free from defects in material and workmanship provided that the columns have been properly installed according to our instructions. We will replace or repair, at our option, any column that has failed as a result of defective material or workmanship. Our warranty does not cover labor or any failures resulting from alterations to the product after purchase. This warranty applies to the original owner of the structure to which they are attached and terminates upon the sale of the structure.

This warranty specifically excludes any and all non-defect damage; any and all damage, injuries and losses arising from unreasonable product use; damages caused by attempts to repair the product by anyone other than an authorized Chadsworth's 1.800.COLUMNS representative; any and all labor and disposal charges that are incurred for removing or reinstalling a replacement product; any and all damage, injuries and losses caused by improper installation; any and all damage injuries and losses resulting from the use of a product that involves the application of weight to the product which exceeds the specified weight limitations for that product, and freight charges. In addition, products sold by Chadsworth's 1.800.COLUMNS that are manufactured by an outside supplier are ultimately the responsibility of the outside supplier and the warranty specified herein will be honored by that supplier.

Chadsworth's 1.800.COLUMNS hereby expressly disclaims any and all other warranties, including without limitation THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. This warranty pertains to the original builder/ homeowner only and is not transferrable.

No representative or person is authorized to assume for Chadsworth's 1.800.COLUMNS any responsibility which would be either an alternative or in addition to the express warranty above. This warranty gives you specific legal rights that may vary from state to state. Some states do not allow the exclusion or limitation on how long an implied warranty lasts, so the preceding limitation may not apply to you. If you desire to make a claim under this warranty, you must notify the builder or retailer from whom the product was purchased within thirty (30) days of the date after you have, or reasonably should have, discovered the defect, and not more than twelve (12) months of the date of shipment. In the event the builder or retailer does not provide service under this warranty, send a written notification to Chadsworth's 1.800.COLUMNS – 277 North Front Street – Wilmington, NC 28401. If a warranted defect exists, Chadsworth's 1.800.COLUMNS will supply a replacement product of the same characteristics as originally furnished. Where replacement products are required and the defective product has been discontinued or is no longer available, Chadsworth's 1.800.COLUMNS reserves the right to select and supply a similar product of equal or greater value. The warranty period shall not be extended by reason of the replacement or repair of defective parts pursuant to this warranty.

Your sole and exclusive remedy in respect of any claim against Chadsworth's 1.800.COLUMNS for breach of warranty or in respect of any claim against Chadsworth's 1.800.COLUMNS based on or relating to any defect in any product delivered by Chadsworth's 1.800.COLUMNS, whether such claim sounds in contract, tort, strict liability or negligence and whether such claim is for property damage, personal injury, commercial loss or other monetary loss shall be, at Chadsworth's 1.800.COLUMNS' option, the repair or replacement of the defective part, or, if in Chadsworth's 1.800.COLUMNS' judgment, remedying the warranted defect by repair or replacement would be commercially impractical, the refund to you of that part of the invoice price for the defective part which has been theretofore paid by you.

CHADSWORTH'S 1.800.COLUMNS SHALL NOT, UNDER ANY CIRCUMSTANCES, BE RESPONSIBLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES WHATSOEVER, including any lost profits, interruption of operations, personal injury, property damage, labor, shipping or other costs incurred by you as a result of such defect or incident to the repair or replacement of, or inability to use, any product of Chadsworth's 1.800.COLUMNS. No employee, agent or other person is authorized to give any warranties on behalf of Chadsworth's 1.800.COLUMNS in addition to or different from those herein given or to assume for Chadsworth's 1.800.COLUMNS any other liability in connection with any of its products except in writing which is signed by an officer of Chadsworth's 1.800.COLUMNS and expressly and intentionally gives such warranties or assumes such liability.

This warranty constitutes the full extent of Chadsworth's 1.800.COLUMNS' responsibility and is in lieu of all other express warranties. NO OTHER WARRANTY, WHETHER EXPRESS, IMPLIED OR STATUTORY, INCLUDING ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE SHALL EXIST IN CONNECTION WITH ANY OF THE GOODS OR SERVICES SUPPLIED HEREUNDER, AND ALL SUCH WARRANTIES ARE HEREBY EXPRESSLY EXCLUDED.

All sales of Chadsworth's 1.800.COLUMNS' products are made pursuant to Chadsworth's 1.800.COLUMNS' Terms and Conditions of Sale, which are adopted and incorporated herein by this reference. In the event of any conflict between the terms of this Limited Warranty and Chadsworth's 1.800.COLUMNS' Terms and Conditions of Sale, the Terms and Conditions of Sale shall control.

ADDENDUM

SHPC Project Notification Approval

ZBA Project Notification Approval

MCH Project Notification Approval (via email)



2016 JUN 23 P 2:45

CITY CLERK'S OFFICE
SOMERVILLE, MA

CITY OF SOMERVILLE, MASSACHUSETTS
OFFICE OF STRATEGIC PLANNING & COMMUNITY DEVELOPMENT
JOSEPH A. CURTATONE
MAYOR

MICHAEL F. GLAVIN
EXECUTIVE DIRECTOR

HISTORIC PRESERVATION COMMISSION

June 23, 2016

Somerville Historical Society
Somerville Museum
1 Westwood Road
Somerville, MA 02143

Barbara Mangum
9 Josephine Avenue
Somerville, MA 02144

Re: HPC 2015.073 R4 – 1 Westwood Road

Certificate of Appropriateness

Ms. Mangum,

The Historic Preservation Commission (HPC) received your application (dated October 28, 2015) for a Historic District Property Certificate on October 28, 2015. After a review of the application, Staff made a determination that the alteration of the Westwood Road entry to meet ADA requirements is within the jurisdiction of the Commission and are subject to their review. Therefore, the alteration was reviewed by the HPC at their public hearings on Tuesday, November 17, 2015, and June 21, 2016. In accordance with the application for an alteration to 1 Westwood Road and the Historic District Ordinance, the HPC grants a Certificate of Appropriateness to the Applicant, Barbara Mangum for the Somerville Historical Society, Owner.

This Certificate of Appropriateness is contingent upon the following conditions:

1. All appropriate building permits shall be obtained prior to the start of any work.
2. If the approval differs from the plans, new plans shall be submitted to Historic Staff prior to commencing the work.
3. The Westwood Road entry porch and stairs shall be demolished.
4. An approximately 6'3" by 22'3" addition with new entries and elevator shall be constructed as per plans by Peter Quinn Architects dated SHPC REV-2 dated May 31, 2016 with the following changes:
 - a. The arched transom over the ADA entry shall have multiple decorative divisions.
 - b. The sills of the arched shuttered 'window' shall be the same size as the adjacent windows.
 - c. All as yet undetermined external lighting fixtures shall be approved by the Historic Preservation Staff.



CITY HALL • 93 HIGHLAND AVENUE • SOMERVILLE, MASSACHUSETTS 02143
(617) 625-6600 EXT. 2500 • TTY: (617) 666-0001 • FAX: (617) 625-0722

www.somervillema.gov


- d. All trim, casings, pilasters and other similar elements shall be wood.
 - e. The ventilator oculus shall be the smallest size necessary for the ventilation of the elevator equipment and as close to the size and configuration as the oculus on the front gable as possible.
 - f. Bricks and mortar shall match the existing building as closely as possible.
5. Only the amount of brick masonry necessary to accommodate the needed changes shall be removed or installed to accommodate the installation of the LULA elevator on three floors: basement, ground and second floors as well the necessary allowance for the open passage between the areas noted in the plans.
 6. The Palladian window shall be relocated to the rear of the building facing the parking area as per MHC Preservation Restriction.
 7. Historic Staff shall issue a sign-off upon completion of the project that this was done in accordance with the Certificate and approved plans and prior to the Somerville Historical Society receiving Inspectional Service Division sign off.

This Certificate of Appropriateness is in accordance with the Somerville Historic District Ordinance Section 6.d.1, *Commission Powers and Duties*, which states, “[i]f the Commission determines that the construction or alteration for which an application for a certificate of appropriateness has been filed will be appropriate for or compatible with the preservation and protection of the historic district, the Commission shall cause a certificate of appropriateness to be issued to the Applicant.”

This Certificate is granted upon the condition that the work authorized herein is commenced within one year after the date of issue. If the work authorized by this Certificate is not commenced within one year after the date of issue, or if work is suspended in significant part for a period of one year after it has begun, this Certificate shall expire.

Please take this letter to Somerville Inspectional Services located at DPW, 1 Franey Road to determine if a Building Permit is required for this approval.

Sincerely,



Kristenna P. Chase
Preservation Planner, Planning Division
Mayor's Office of Strategic Planning & Community Development

Cc: Paul Nonni, Sr. Building Inspector, Inspectional Services Division.
George Proakis, Director, Planning Division
Hans Jensen, Zoning Review Planner
John Long, City Clerk



CITY OF SOMERVILLE, MASSACHUSETTS
MAYOR'S OFFICE OF STRATEGIC PLANNING & COMMUNITY DEVELOPMENT
JOSEPH A. CURTATONE
MAYOR

MICHAEL F. GLAVIN
EXECUTIVE DIRECTOR

PLANNING DIVISION

ZONING BOARD OF APPEALS MEMBERS

ORSOLA SUSAN FONTANO, CHAIRMAN
RICHARD ROSSETTI, CLERK
DANIELLE EVANS
ELAINE SEVERINO
JOSH SAFDIE
ANNE BROCKELMAN, (ALT.)

Case #: ZBA 2016-04
Site: 1 Westwood Road
Date of Decision: August 17, 2016
Decision: Petition Approved with Conditions
Date Filed with City Clerk: August 22, 2016

ZBA DECISION

Applicant Name:	Evelyn Battinelli, Somerville Musuem
Applicant Address:	24 Hudson Street, Somerville, MA 02143
Property Owner Name:	Somerville Historical Society
Property Owner Address:	1 Westwood Road, Somerville, MA 02143
Agent Name:	Richard Graf, RA
Agent Address:	11 Franklin Avenue, Chelsea, MA 02151

Legal Notice: Applicant, Somerville Museum under Barbara Mangum, seeks a Special Permit under §4.4.1 of the SZO to increase the FAR, and substantially alter the building to install an elevator in order to meet ADA requirements.

<u>Zoning District/Ward:</u>	RA zone/Ward 3
<u>Date of Application:</u>	January 28, 2016
<u>Date(s) of Public Hearing:</u>	August 17, 2016
<u>Date of Decision:</u>	August 17, 2016
<u>Vote:</u>	5-0

Appeal #ZBA 2016-04 was opened before the Zoning Board of Appeals at Somerville City Hall on August 17, 2016. Notice of the Public Hearing was given to persons affected and was published and posted, all as required by M.G.L. c. 40A, sec. 11 and the Somerville Zoning Ordinance. After one hearing of deliberation, the Zoning Board of Appeals took a vote.



DESCRIPTION:

In order to comply with the Americans with Disabilities Act (ADA), the Museum must install an elevator that will provide access to all levels of the building. The Museum has been through the MAAB process and, as a single building Local Historic District (LHD), has obtained the approval of the Somerville HPC for the design of the addition housing the elevator. There is a preservation restriction on the Museum that is held by the Massachusetts Historical Commission (MHC) which requires that the Museum re-install a specific, historic, Palladian window on the rear elevation of the building at the same time as an elevator is installed. The Palladian window will be installed as part of this project.

FINDINGS FOR SPECIAL PERMIT (SZO §4.4.1):

In order to grant a special permit, the SPGA must make certain findings and determinations as outlined in §4.4.1 of the SZO. This section of the report goes through §4.4. in detail.

1. **Information Supplied:****Regarding SZO §4.4.1:**

- The Board finds that the information provided by the Applicant conforms to the requirements of §4.4.1 of the SZO and allows for a comprehensive analysis of the project with respect to the required Special Permits.

2. **Compliance with Standards: The Applicant must comply "with such criteria or standards as may be set forth in this Ordinance which refer to the granting of the requested special permit."****Regarding SZO §4.4.1:**

- The non-conformities affected by this proposal are front setback, FAR, ground coverage and use.
- This structure is located in the RA zone where only one- and two-family residential structures are allowed. However, the property's non-conforming use has lawfully existed on this site since the 1920s.
- The maximum FAR allowed in the RA zone is .75. The building in question is already non-conforming with regard to FAR at 1.17. The ADA-compliant addition will add minimal additional usable area to the structure, only bringing the FAR up to 1.21.

Section 4.4.1 states that Lawfully existing non-conforming structures other than one- and two-family dwellings may be enlarged, extended, renovated or altered only by special permit authorized by the SPGA in accordance with the procedures of [Article 5](#). The SPGA must find that such extension, enlargement, renovation or alteration is not substantially more detrimental to the neighborhood than the existing nonconforming building. In making the finding that the enlargement, extension, renovation or alteration will not be substantially more detrimental, the SPGA may consider, without limitation, impacts upon the following: traffic volumes, traffic congestion, adequacy of municipal water supply and sewer capacity, noise, odor, scale, on-street parking, shading, visual effects and neighborhood character.

Regarding SZO §4.4.1:

- In considering a Special Permit under §4.4.1 of the SZO, the Board finds that the alterations proposed to the Museum are not substantially more detrimental to the neighborhood than the



existing, non-conforming building. Staff finds that the proposed addition is in keeping with the general character of the surrounding neighborhood and that the style, design, massing and materials of the addition are compatible with these existing characteristics of the original Museum building.

- The style, design, massing and materials of the addition are also in keeping with the character of the Westwood Road neighborhood which contains numerous properties dating from the 1890s through the early 1920s. This surrounding neighborhood contains multiple gable-ended, shingle style, gambrel, and Queen Anne style structures. The Classical Revival elements of the addition are compatible with the Classical Revival style of the original Museum structure.

When providing an ADA building access, the ADA-compliant entrance/exist cannot be secondary to an entrance/exist utilized by able-bodied individuals. The proposed addition will allow the Museum to provide both ADA-compliant and non-ADA compliant building access at the same location on the site.

The proposed addition will reduce the front setback from the already non-conforming 6.4 feet to +/- 0.1 feet. Essentially, the ADA-compliant addition will rest right at the front property line without encroaching on City property.

This is a rare case where the Board would recommend this extensive encroachment into a setback. However, taking into consideration the need to provide ADA access and that the proposed location of the addition provides the best possible access to all portions of the building, including the basement restrooms, Staff finds that the proposed addition and its location will not be substantially more detrimental to the structure or to the surrounding neighborhood.

- The existing ground coverage conditions are 50.77%. The ADA addition will increase this ground coverage by a further 5.1% the Board finds that this increase in ground coverage will not be significantly more detrimental to the site or surrounding neighborhood. As the Museum finds itself in a situation whereby it must become compliant in order to hold public functions, this additional ground coverage is necessary to accommodate an appropriately sized, scaled, and designed ADA-compliant entrance/exit.

3. Consistency with Purposes: *The Applicant has to ensure that the project "is consistent with (1) the general purposes of this Ordinance as set forth in Article 1, and (2) the purposes, provisions, and specific objectives applicable to the requested special permit which may be set forth elsewhere in this Ordinance, such as, but not limited to, those purposes at the beginning of the various Articles."*

Regarding SZO §4.4.1:

- The proposal is consistent with the general purposes of the Ordinance as set forth under §1.2, which includes, but is not limited to promoting the health, safety, and welfare of the inhabitants of the City of Somerville; to secure safety from fire, panic and other dangers...
- Though not a housing unit, the Museum and its addition are consistent with a subsidiary purpose of the RA district which is to provide uses that are "... both compatible with and convenient to the residents of such districts."

4. Site and Area Compatibility: *The Applicant has to ensure that the project "(i)s designed in a manner that is compatible with the characteristics of the built and unbuilt surrounding area, including land uses."*



- The style, design, massing and materials of the addition are also in keeping with the character of the Westwood Road neighborhood which contains numerous properties dating from the 1890s through the early 1920s. This surrounding neighborhood contains multiple gable-ended, shingle style, gambrel, and Queen Anne style structures. The Classical Revival elements of the addition are compatible with the Classical Revival style of the original Museum structure.

5. Housing Impact: *Will not create adverse impacts on the stock of existing affordable housing.*

- The proposal is for a museum building and has no impact on the stock of affordable housing.

6. SomerVision Plan: *Complies with the applicable goals, policies and actions of the SomerVision plan, including the following, as appropriate: Preserve and enhance the character of Somerville's neighborhoods, transform key opportunity areas, preserve and expand an integrated, balanced mix of safe, affordable and environmentally sound rental and homeownership units for households of all sizes and types from diverse social and economic groups; and, make Somerville a regional employment center with a mix of diverse and high-quality jobs. The areas in the SomerVision map that are designated as enhance and transform should most significantly contribute towards the SomerVision goals that are outlined in the table below. The areas marked as conserve are not expected to greatly increase the figures in the table since these areas are not intended for large-scale change.*

- The proposal is for a museum building and has no impact on the SomerVision Plan.



DECISION:

Present and sitting were Members Orsola Susan Fontano, Richard Rossetti, Elaine Severino, Josh Safdie and Anne Brockelman voting with Danielle Evans absent. Upon making the above findings, Richard Rossetti made a motion to approve the request for a Special Permit. Josh Safdie seconded the motion. Wherefore the Zoning Board of Appeals voted **5-0** to **APPROVE** the request. In addition the following conditions were attached:

#	Condition	Timeframe for Compliance	Verified (initial)	Notes								
1	Approval is for the construction of an addition to house and elevator to address ADA access.	BP/CO	ISD/ Plng.									
	<table border="1"> <thead> <tr> <th>Date (Stamp Date)</th> <th>Submission</th> </tr> </thead> <tbody> <tr> <td>January 28, 2016</td> <td>Initial submission to City Clerk</td> </tr> <tr> <td>July 1, 2016</td> <td>Updated plans submitted to OSPCD</td> </tr> <tr> <td>July 26, 2016</td> <td>Final plans submitted to OSPCD.</td> </tr> </tbody> </table>				Date (Stamp Date)	Submission	January 28, 2016	Initial submission to City Clerk	July 1, 2016	Updated plans submitted to OSPCD	July 26, 2016	Final plans submitted to OSPCD.
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	January 28, 2016				Initial submission to City Clerk							
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July 26, 2016	Final plans submitted to OSPCD.											
Any changes to this project must be submitted to Planning Staff for review prior to their implementation.												
Construction Impacts												
2	The Applicant shall, at their expense, replace any existing equipment (including, but not limited to street sign poles, signs, traffic signal poles, traffic signal equipment, wheel chair ramps, granite curbing, etc.) and the entire sidewalk immediately abutting the subject property if damaged as a result of construction activity. All new sidewalks and driveways must be constructed to DPW standard.	CO	DPW									
3	The applicant shall post the name and phone number of the general contractor at the site entrance where it is visible to people passing by.	During Construction	ISD/Plng.									
4	All construction materials and equipment must be stored onsite. If occupancy of the street layout is required, such occupancy must be in conformance with the requirements of the Manual on Uniform Traffic Control Devices and the prior approval of the Traffic and Parking Department must be obtained. Construction equipment shall NOT be stored on City property.	During Construction	T&P/ ISD									
Design												
5	The design shall be executed exactly as rendered on the plan set submitted on July 26, 2016 (identified in item 1 above), including the re-installation of the Palladian window.	CO	ISD/Plng									
Site												



6	Lighting for the signage board shall be downcast only and shall be of a design and material approved by Planning/Preservation Staff.	Perpetual	Plng. / ISD	
7	Lighting for the signage board shall not extend from the building such that it overhangs onto the city sidewalk.	Perpetual		
8	The signage board shall be lit only during the hours when specific events are taking place. They shall be extinguished immediately thereafter.	Perpetual	Plng. / ISD	
9	The site shall be landscaped and maintained post-construction.	Perpetual	Plng. / ISD	
Miscellaneous				
10	The Applicant, its successors and/or assigns, shall be responsible for maintenance of both the building and property.	Perpetual	ISD/Plng	
11	Any changes to the materials used for this project must first receive the approval of Planning/Preservation Staff and/or HPC prior to their installation.	Perpetual	Plng	
Public Safety				
12	The Applicant or Owner shall meet the Fire Prevention Bureau's requirements.	CO	FP	
Final Sign-Off				
13	The Applicant shall contact Planning Staff at least five working days in advance of a request for a final inspection by Inspectional Services to ensure the proposal was constructed in accordance with the plans and information submitted and the conditions attached to this approval.	Final sign off	ISD/Plng.	

Attest, by the Zoning Board of Appeals:

Orsola Susan Fontano, *Chairman*
 Richard Rossetti, *Clerk*
 Elaine Severino
 Josh Safdie
 Anne Brockelman (Alt.)

Attest, by the Administrative Assistant:

Dawn M. Pereira

Copies of this decision are filed in the Somerville City Clerk's office.
 Copies of all plans referred to in this decision and a detailed record of the SPGA proceedings are filed in the Somerville Planning Dept.



CLERK’S CERTIFICATE

Any appeal of this decision must be filed within twenty days after the date this notice is filed in the Office of the City Clerk, and must be filed in accordance with M.G.L. c. 40A, sec. 17 and SZO sec. 3.2.10.

In accordance with M.G.L. c. 40 A, sec. 11, no variance shall take effect until a copy of the decision bearing the certification of the City Clerk that twenty days have elapsed after the decision has been filed in the Office of the City Clerk and no appeal has been filed, or that if such appeal has been filed, that it has been dismissed or denied, is recorded in the Middlesex County Registry of Deeds and indexed in the grantor index under the name of the owner of record or is recorded and noted on the owner’s certificate of title.

Also in accordance with M.G.L. c. 40 A, sec. 11, a special permit shall not take effect until a copy of the decision bearing the certification of the City Clerk that twenty days have elapsed after the decision has been filed in the Office of the City Clerk and either that no appeal has been filed or the appeal has been filed within such time, is recorded in the Middlesex County Registry of Deeds and indexed in the grantor index under the name of the owner of record or is recorded and noted on the owner’s certificate of title. The person exercising rights under a duly appealed Special Permit does so at risk that a court will reverse the permit and that any construction performed under the permit may be ordered undone.

The owner or applicant shall pay the fee for recording or registering. Furthermore, a permit from the Division of Inspectional Services shall be required in order to proceed with any project favorably decided upon by this decision, and upon request, the Applicant shall present evidence to the Building Official that this decision is properly recorded.

This is a true and correct copy of the decision filed on _____ in the Office of the City Clerk, and twenty days have elapsed, and

FOR VARIANCE(S) WITHIN

_____ there have been no appeals filed in the Office of the City Clerk, or
_____ any appeals that were filed have been finally dismissed or denied.

FOR SPECIAL PERMIT(S) WITHIN

_____ there have been no appeals filed in the Office of the City Clerk, or
_____ there has been an appeal filed.

Signed _____ City Clerk Date _____



From: Holtz, Paul (SEC) <paul.holtz@state.ma.us>
To: 'Barbara Mangum' <bmangum411@aol.com>
Subject: RE: Receipt of the Somerville Museum's Project Notification Form?
Date: Tue, Sep 17, 2019 10:03 am

Hi Barbara

Yes, I have received and reviewed the PNF regarding the Somerville Museum elevator addition project. You can consider the plans to be approved under the terms of the Preservation Restriction (M.G.L. Chapter 184, Section 31-33). I will also provide a written letter confirming this PR approval.

Paul Holtz

MHC

From: Barbara Mangum [mailto:bmangum411@aol.com]
Sent: Tuesday, September 17, 2019 9:59 AM
To: Holtz, Paul @ SEC
Subject: Receipt of the Somerville Museum's Project Notification Form?

Dear Paul,

I hope you are doing well. Earlier this summer, I sent a project notification form to the MHC regarding moving ahead with the elevator addition project at the Somerville Museum. Could you let me know if you have received this and whether you have any questions? I am currently working on a request for funds to our local CPA and would like to include this in the narrative.

My best,

Barbara Mangum

President of the Board

Somerville Museum

1 Westwood Road

Somerville, MA 02143