

# Request for Expressions of Interest

dcr  
Massachusetts



Historic  
Curatorship  
Program



SUPERINTENDENT'S  
HOUSE

BEARTOWN STATE RESERVATION  
MONTEREY

c. 1800



The **Department of Conservation and Recreation** is steward of one of the largest state parks systems in the country. Its over 450,000 acres is made up of forests, parks, greenways, historic sites and landscapes, seashores, lakes, ponds, reservoirs and watersheds. DCR's mission statement is:

*To protect, promote and enhance our common  
wealth of natural, cultural and recreational  
resources for the well-being of all*

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Conservation and Resource Stewardship  
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Ethan Parsons, *Program Manager*

# INTRODUCTION

The Massachusetts Department of Conservation and Recreation's (DCR) is pleased to release a **Request for Expressions of Interest** for a historic property eligible for DCR's **Historic Curatorship Program**.

The purpose of this document is to identify parties interested in the unique opportunity to write the next chapters in the long and rich history of this historically significant property. It is also an opportunity for neighbors and other stakeholders to provide commentary and input regarding the potential leasing of the property to an outside party.

The **Historic Curatorship Program** is a national model and has helped DCR preserve many of its underutilized but historically significant properties by partnering with outside parties who exchange rehabilitation, management and maintenance services for credit towards a long term lease. Curators are selected through an open and competitive process and work must be performed according to the Secretary of the Interior's Standards for Historic Rehabilitation.

A range of building types and styles have been preserved through the program for many different types of reuses. Those reuses include residential, youth and health oriented non-profits, for-profit hospitality, museum, and artist lofts. In preserving these valuable but threatened historic resources, Curators not only assist DCR in fulfilling its mission "To protect, promote and enhance our common wealth of natural, cultural and recreational resources for the well-being of all," it injects new life into long forgotten landmarks, and often introduces new programs and services to park visitors.

## **The purpose of this RFEI is to:**

- Present the opportunity provided by the Historic Curatorship Program
- Stimulate interest from potential public-private partners
- Identify development concerns, challenges and questions from potential Curators
- Assist in the development of a formal Request for Proposals (RFP)
- Offer the neighbors and the surrounding communities the opportunity to provide comments, concerns, feedback and ideas regarding the leasing of the property to an outside party

If DCR receives substantial interest in any of these properties, they may choose to release a formal Request for Proposals. At that time, interested parties will have the opportunity to further inspect the property.

*This document is a general description and call for interest and **not a request for formal proposals**. Any party with a creative and compatible idea for the rehabilitation, management and long term maintenance of any of the properties is encouraged to respond to this RFEI. Submission of an Expression of Interest will not be a prerequisite for submitting a formal proposal, nor will DCR consider information submitted at this time to be binding on the respondent. This Request does not require DCR to release a subsequent Request for Proposals.*



# HISTORIC CURATORSHIP PROGRAM

Since 1994, DCR's Historic Curatorship Program has preserved 25 of its unused historic properties and leveraged over \$32 million in outside investment

Within the Commonwealth's 450,000 acres of State and Urban Parks are a number of unused, historically significant buildings. Over time, these properties have fallen prey to the elements and vandalism. The **Historic Curatorship Program** was established in to preserve these properties through a unique public-private partnership.



Glendledge Cottage, Halibut Point State Park, Rockport, Before and After



House tour, Barton House, F. Gilbert Hills State Park, Foxboro

Through the program, DCR partners with a Curator who agrees to rehabilitate, manage and maintain a historic property in return for a long-term lease. As a result, DCR secures the long-term preservation of threatened historic sites and Curators exchange their hard work and unique skills for the opportunity to live or work in a one-of-a-kind location. Curatorship properties are preserved through a wide range of reuses – residential, non-profit, for profit, hospitality and museums.

Curators are selected through an open and competitive process and proposed reuses must be compatible with the historic and natural character of the park or forest. Proposals are evaluated according to the experience of the applicant, the quality of the reuse plan, proof of sufficient resources to undertake the project, and level of public benefit beyond providing biannual public access. Average lease terms range from 20 to 30 years.



Bradley Palmer Mansion (Willowdale Estate), Bradley Palmer State Park, Topsfield



**Horseneck Point Lifesaving Station, Horseneck Beach State Reservation, Westport,  
Before and After**

**PROBLEM:** Dozens and dozens of unused state-owned historic properties sit under-used and under-maintained

**SOLUTION:** 1994 - State creates program that allows outside parties to rehabilitate, manage and maintain these invaluable resources in return for a long term lease

**OPPORTUNITY:** Curators contribute their investment, skills, and hard work and live or work in a one of a kind property in a one of a kind location.

**RESULT:** Eyesores and liabilities transformed into valuable assets that complement or enhance the visitor experience at little cost to the citizens of the Commonwealth

#### **PROGRAM BY THE NUMBERS**

**61** - Properties eligible under legislation

**25** - Properties under Agreement:

12: residential

4: non-profit

3: municipality in partnership  
w/non-profit

6: for-profit

**OUTSIDE INVESTMENT** (as of 11/20)

**\$23,148,455.86:** Actual invested to date

**\$31,894,069.54:** Leveraged over lease terms

**\$7** of outside investment for every  
**\$1** invested by DCR



**Visitors enjoy a meal at Bascom Lodge, Mt. Greylock State  
Reservation, Adams**

For more information on the program,  
please contact: [HCP.Requests@mass.gov](mailto:HCP.Requests@mass.gov)

or VISIT: [tinyurl.com/ma-curators](http://tinyurl.com/ma-curators)



**Volunteers help raise a timber frame addition to the  
Wilbur House, Borderland State Park, Easton**

# SUBMISSION REQUIREMENTS

The Commonwealth invites all parties to respond to this Request for Expressions of Interest by submitting a brief narrative of the proposed reuse concept, a statement of qualifications and a brief outline of the feasibility of the proposed project. Response should not exceed three (3) pages.

**DCR will continue to accept responses to this document until a Request for Proposals is issued or another reuse is found for the building**

Submissions should be e-mailed to:

**HCP.Requests@mass.gov**

Emailed responses will be accepted if under 5 MB.

Responses to the RFEI are public documents and will be utilized by DCR to develop the Request for Proposals (RFP) for the property. Respondents understand that information provided may be used in whole or in part by the Commonwealth. Response to this RFEI does not legally bind the respondent to the Historic Curatorship Program or DCR in any way. Conversely, response to the RFEI is not a prerequisite for submission of a proposal through the RFP process.

All respondents to this RFEI will receive a copy of a Request for Proposals, if released, unless DCR is notified otherwise.

If you are not submitting a response to this request but would like to be on the Curatorship Program's notification list to be informed of any new Requests for Expressions of Interest or Requests for Proposals, please send your contact information to the mailing address above or to [HCP.Requests@mass.gov](mailto:HCP.Requests@mass.gov). If applicable, please note a specific property or particular region of interest (Boston area, Northeast, Southeast, Central Mass or the Berkshires).



# SUPERINTENDENT'S HOUSE

## Beartown State Forest, Monterey

The Headquarters House is a 2-story, Federal era farmhouse located at a quiet wooded crossroads within Beartown State Forest. The site is significant to for its connections to over 200 years of agricultural and forest history in Monterey. The original section of the house, a post-and-beam structure built in 1799, includes a full basement with a concrete floor and mortared fieldstone walls. A one-story rear wing was added when the Civilian Conservation Corps (CCC) converted the former farmhouse into a forest headquarters in the 1930s for CCC Forest Superintendent John Lambert. This post-and-beam structure consists of one large room and a large rustic fieldstone fireplace at the east gable end. The interior of the house is characterized by exposed timbers and purlins and plank wall paneling on the second floor. The house features Craftsman-style built-ins such as map files, a hutch and a linen closet, all dating from the 1930s. The house interior invokes its past both as a rural early American farmhouse and as a CCC-designed forest headquarters.

**DCR is not considering residential reuses at this time.**

## BUILDING STATISTICS

### Square Footage

2,300 square feet (additional 800 s.f. in basement) including 4 bedrooms and 2 bathrooms

### Sanitary system

Title V compliant septic system that has not been used in a number of years and will need to be tested and reconnected to the house.

### Plumbing System

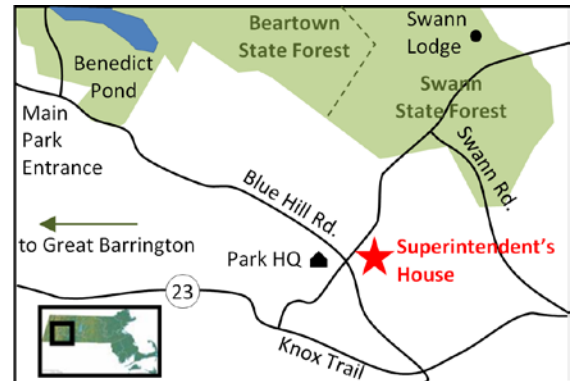
Entire plumbing system will likely need to be replaced. Water connection is from a well shared by the adjacent headquarters building.

### Electric System

Will require a completely new service and system.

### Roof

A new roof was installed in 2018.



### Structure

The structural integrity of the building is compromised. DCR repaired much of the sill and stabilized the basement walls and floor, and will perform additional structural repairs in 2020/2021.

### Interior Elements

The house retains many of its historic interior finishes, including some flooring, wood paneling and built-in furniture.

### Exterior elements

The exterior of the house will need to be scraped, painted and will require some clapboard repair. All of the windows frames are in poor condition and will need to be repaired. The sash are currently being restored but will need to be reinstalled.



## **REHABILITATION COST ESTIMATES (2020)**

Please note on the cost estimates, that they are for reference only and represent the cost to DCR to perform the same work. Most Curators are able to leverage sweat equity towards these rehabilitation costs.

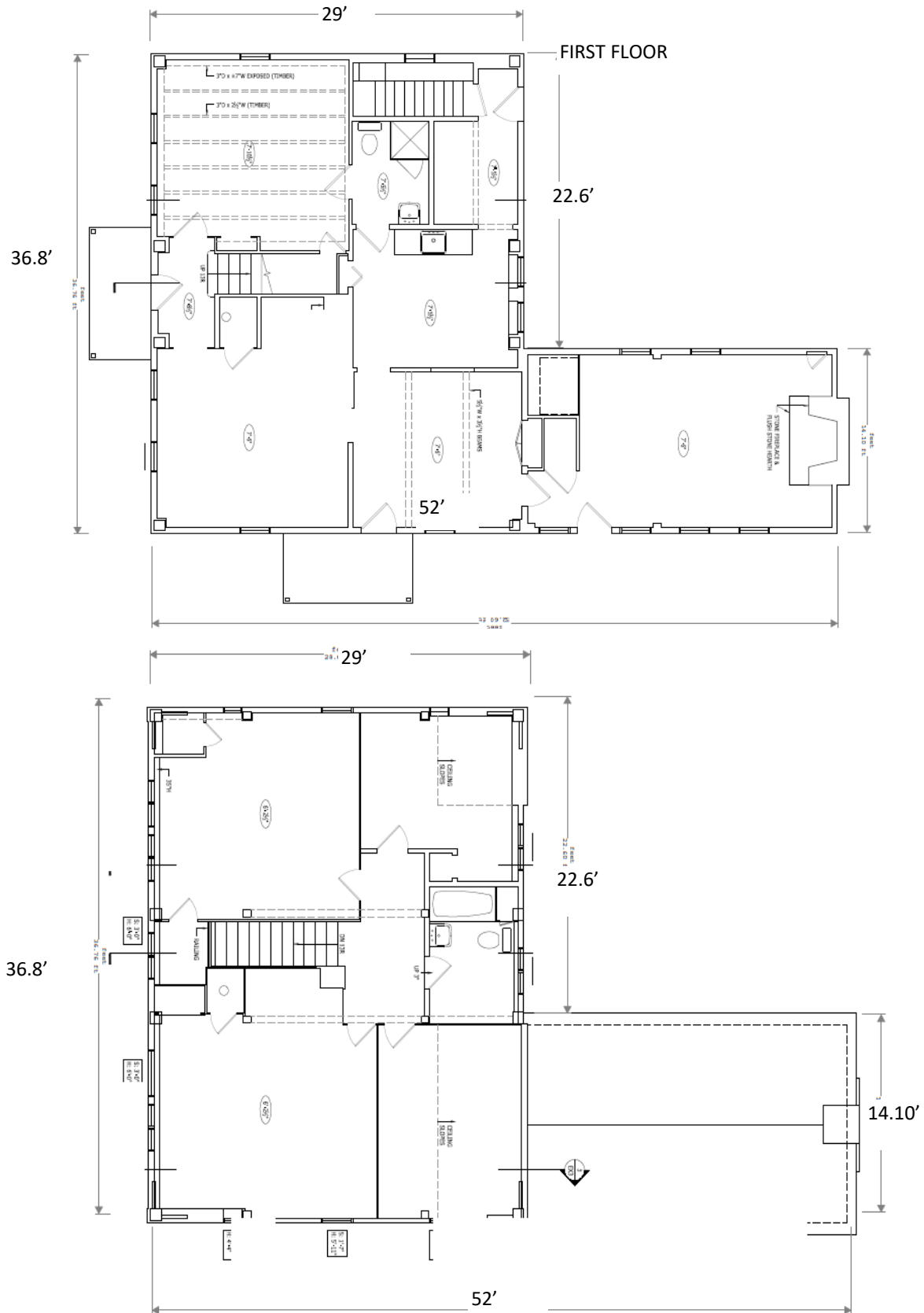
Demolition	\$14,314
Structural	\$15,610
Exterior elements	\$21,260
Windows + Doors	\$5,599
Chimney	\$23,446
Finishes	\$17,915
Plumbing	\$54,197
HVAC	\$115,596
Electrical	\$47,371
General Requirements	\$41,609
<b>Total</b>	<b>\$356,917</b>



## **REUSE CONSIDERATIONS**

- The ceilings on the second floor are very low (approx. 6 feet)
- DCR has stabilized the sill of the main house and replaced the roof, and plans to perform additional structural and site work in 2020.
- The house sits on a cleared area of approximately 1 acre





# FREQUENTLY ASKED QUESTIONS

## **What is the Historic Curatorship Program?**

Within the thousands of acres of the Commonwealth's Forests and Parks are many historically significant buildings with great potential for adaptive reuse. Without direct public funding, these mansions, houses and cottages have fallen prey to the elements and vandalism. Under the Historic Curatorship Program, DCR enters into a long term lease with a Curator who pays rent in the form of services, specifically the rehabilitation and maintenance of the property. The reuse of these significant properties must be compatible with the surrounding community while enhancing the visitor's experience of the public park.

## **Why Become a Curator?**

- Curators have the opportunity to live and/or work in a unique natural setting, often surrounded by acres of undeveloped property.
- Curators with the requisite skills and experience can leverage the value of their "sweat equity" towards rehabilitation costs.
- Curators are part of a one-of-a-kind community and contribute to the preservation of the Commonwealth's rich history.

## **Is a Curatorship *really* "rent free"?**

According to the Historic Curatorship Program's Enabling Legislation, (Section 44, Chapter 85, Acts of 1994 (amended)) DCR must establish a *Fair Market Rent* value for the lease. The Fair Market Rent is determined through a number of methods, including third party appraisals and publically maintained rent indices. Work on the property is then deducted from this rent amount. In most cases, Curators will accrue much of the rent for the term in the first three to five years. No cash rent is collected during the base lease term as long as the Curator continues to fulfill the obligations under the lease and the Work Plan.

## **Which properties are eligible for the program?**

DCR's Curatorship Program includes properties within the State Park system that have been approved via special legislation for long term lease through the Historic Curatorship Program by the State Legislature. Properties are selected based on a number of criteria, including its historic / architectural significance, present condition, DCR reuse potential and potential public interest. New properties can be added through additional amendments, but they require a 2/3 approval of the Legislature. While a number of properties are eligible for the Curatorship Program, unsolicited applications are not accepted.

## **How do I become a Curator?**

Based on a number of factors, including historic significance, level of threat, and public interest, DCR issues Requests for Proposals (RFP) for one or more eligible properties at a time. The RFP describes the submission requirements and provides detailed information on the property, including a conditions assessment and cost estimates. Interested parties respond to the RFP by submitting a proposal for competitive review by DCR. Successful proposals outline a viable reuse concept, public benefit, rehabilitation approach and implementation schedule and demonstrate relevant experience and sound financial qualifications for tenancy. Submission deadlines are usually 8-10 weeks after the release of the RFP and an open house is held for interested parties to examine the interior of the property. Check the website for notices for new RFPs.

## **What are the criteria for selecting a Curator?**

Selection criteria include:

- Quality of proposed reuse
- Impact of reuse on the park, park staff and the surrounding community
- Scope and nature of public benefit element
- Strength of rehabilitation plan
- Experience and qualifications
- Financial capability
- Overall proposal presentation and organization

### **How long is a lease term?**

The most common lease term is twenty-five to thirty years. Terms must reflect the amount of work required for rehabilitation, management and maintenance in relation to the Fair Market Rent. Generally, the more investment required the longer the lease term offered. An applicant may propose an alternative term if there is a justification for a longer lease.

### **What types of reuses are possible?**

Reuse proposals are judged on their compatibility with the historic property as well as with the context of the park and surrounding community. While approximately half of the current Curators occupy their properties as residences, other Curatorships include a wedding and events center, a mountaintop lodge, museums, rental cottages, a market / café, an artist loft complex and non-profits. DCR encourages reuse ideas that first and foremost provide for the preservation and maintenance of the historic resource and discourages any reuse that could potentially add to DCR's management responsibilities for the park. In general, reuses other than residential will trigger additional improvements required by building code, including compliance with the Americans with Disabilities Act, fire protection, public water supply regulations, bathroom and septic system requirements and structural upgrades for more intense usage.

### **What are the financial requirements of a Curator?**

The Building Conditions Assessment is the basis for determining the approximate cost of rehabilitating a property. Cash, or sweat-equity, the non-monetary investment of time and labor, are both accepted methods of capital investment and credit towards rent. While most Curators apply sweat equity to much of the work, access to adequate capital for materials, work by licensed contractors and management costs is required.

### **Do I have to pay property tax on the Curatorship property?**

The Curator is responsible for paying all applicable taxes and fees which may be associated with the property for the duration of the lease. It is up to the individual city/town in which the property is located to determine whether it will levy property taxes. While most cities and towns currently do not levy property taxes on Curatorship properties, DCR cannot guarantee that they will not attempt to do so in the future.

### **What type of insurance do I have to take out on the property?**

The Curator is responsible for maintaining in full force sufficient fire and casualty insurance to cover costs of rehabilitating any partial damage or destruction of the property. Comprehensive liability insurance must also be maintained for all activities allowed under the lease. Most Curators also carry personal property insurance on those items not secured to the property. In the case of a partial loss by fire or other damage, the Curator has the option to apply insurance proceeds towards rebuilding. In the case of a total loss, DCR reserves the right to determine whether rebuilding is in the best interest of the program.

### **What will happen if the Curator is unable to fulfill the requirements of the lease?**

DCR understands that a Curator's life is subject to unforeseen changes which may prevent them from continuing with the Curatorship of a property. In this situation each case will be reviewed on an individual basis with DCR



reserving decision making authority. The Curator, however, should not anticipate reimbursement for restoration work already performed on the property under any circumstances. DCR also has the right to terminate the lease if the Curator fails to comply with the terms and conditions of the lease agreement, abandons the premises, or declares bankruptcy. Curators may be liable for the balance of accrued rent minus the value of the investment to that point in the lease term.

### **What types of changes can I make to the property?**

In the application process, the prospective Curator submits a proposed Rehabilitation Plan, based on the guidelines of the RFP. In consultation with DCR and the Massachusetts Historical Commission, the plan will become the framework for the rehabilitation. In the occasion of a proposed change outside the agreed-upon scope of work, projects must be reviewed by DCR in consultation with the Massachusetts Historical Commission to determine whether the change is compatible with the historic character of the property. DCR discourages the construction of new substantial buildings. Minor additions to existing buildings and the addition of accessory outbuildings are more commonly approved alterations. More flexibility is normally allowed on building interiors, as long as historic finishes and features are retained. Any new construction, exterior alteration or addition must be reviewed and approved by DCR and the Massachusetts Historical Commission.

### **Do I have to restore the property right away, or can I phase the work over several years?**

The Rehabilitation Plan schedule does not require a Curator to complete all required work in any specific period of time. However, it is expected that life-safety issues and major work, such as structural stabilization, and exterior improvements be performed early in the lease. The efficiency of the implementation schedule is a factor in the Curator selection process. Curators are required to invest the equivalent of the determined Fair Market Rent.

### **When can I have access to the property? Can I live in the house while restoring it?**

Under a Provisional Lessee Designation, the selected Curator is required to perform certain tasks, including securing insurance for the property, beginning any necessary permitting processes and confirming financial information. During this period a lease is negotiated. Prior to the execution of a lease, a Curator may work on the property under a Memorandum of Understanding, issued by DCR. Any investment made before a lease is executed, however, is done at the designated Curator's own risk. Once a lease is executed, Curators can live in the house during restoration as long as the property receives a Certificate of Occupancy from the State Building Inspector.

### **How often will the property have to be open to the public?**

As stated in the enabling legislation for the Historic Curatorship Program, [Section 44, Chapter 85, Acts of 1994 (amended)], the property must be opened to the public no less often than twice each year "for the purpose of providing public access to the historic quality of the property." The timing of opening the property as well the determination of which areas would be open for public viewing will be determined by the Curator and laid out in the work schedule attached to the lease.

### **What is meant by "public benefit"?**

As stated above, the Historic Curatorship Program enabling legislation requires a minimum level of public access to the property. One of the criteria for the selection of a Curator is whether the reuse concept will have any benefit to the public beyond the physical rehabilitation of the property. While the preservation of the property is the first priority for a Curator, public benefit can be a service or activity that is compatible with the site and benefits the park visitors or the surrounding community. Additional public benefit above and beyond the two required public access events is used by DCR when evaluating proposals with comparable levels of experience and resources. Some past examples of possible public benefit include:

- Coordinating a senior's garden and farm tour
- Sponsoring bi-annual tours of the property
- Partnering with the park on a public event or project (Great Park Pursuit, Park Serve Day, etc)
- Opening a garden to a local group
- Holding a demonstration class highlighting preservation carpentry
- Allowing a local group to use the property for meeting or event space